



BELLEVUE BOTANICAL  
GARDEN  
SOCIETY

## PLANNED GIVING

Make a lasting contribution toward ensuring the Bellevue Botanical Garden and the Bellevue Botanical Garden Society are here for future generations. The Society brings life to the Garden through education, events, and Garden development.

There are many types of planned gifts, including outright gifts, bequests by will, charitable trusts, life income agreements, gift annuities and life insurance. As a donor, it can be confusing to determine which vehicle (if any) is most beneficial to your circumstances. While the Bellevue Botanical Garden Society is ever-grateful for planned gifts, it is important for us to know that you have consulted an attorney or financial advisor. Please note that the Bellevue Botanical Garden Society is not engaged in giving legal or financial advice.

## PLANNED GIFT OPTIONS

- **Gift Annuity:** In exchange for your gift to charity, you or 1-2 other annuitants receive a fixed sum each year for life.
- **Deferred Gift Annuity:** In exchange for your gift to charity, you or 1-2 other annuitants receive a fixed sum each year for life starting at the date of first payout.
- **Charitable Remainder Unitrust:** Your unitrust pays a fixed percentage of its value, determined each year, to you or others you name for life or a term of years. The remaining assets then go to charity.
- **Charitable Remainder Annuity Trust:** Your trust pays a fixed dollar amount each year to you or others you name for life or a term of years. The remaining assets then go to charity.

- **Retained Life Estate:** You deed your home or farm to charity, but retain the right to live in it for the rest of your life, a term of years, or a combination of the two.
- **Charitable Lead Unitrust:** Your unitrust pays a fixed percentage of its value, determined each year, to charity for a term of years or one or more lifetimes. The accumulated assets then go back to you or others you name.
- **Charitable Lead Annuity Trust:** Your trust pays a fixed dollar amount each year to charity for a term of years or one or more lifetimes. The accumulated assets then go back to you or others you name.

## Gifts that Pay You Income

### **Charitable Gift Annuity**

In exchange for a gift of cash, stocks or bonds, the Bellevue Botanical Garden Society will pay you or a loved one a fixed income for life. The payments are based on the amount of the gift, whether one or two individuals will receive payments and those individuals' ages when the annuity is created.

**Charitable Remainder Trust**  
You and the Bellevue Botanical Garden Society enter into a trust agreement. You contribute assets to the trust for a purpose you designate, the Bellevue Botanical Garden Society manages the trust's assets for your benefit and you receive income from the trust each year for life or a term of years. When the trust ends, the remaining trust assets benefit the purpose you have chosen.

### **Pooled Income Fund**

Your gift to the Bellevue Botanical Garden Society's Pooled Income Fund is combined with the contributions of others. You receive annual payments based on the fund's performance and your share of the pool. At your death, the Bellevue Botanical Garden Society withdraws your share of the fund's assets to support your chosen purpose.

## **Gifts that the Bellevue Botanical Garden Society Can Use Today**

### **Outright gifts**

You can make an outright gift of real estate, publicly traded securities, closely held stock, a paid up life insurance policy and other property of value.

### **Tangible personal property**

The Bellevue Botanical Garden Society encourages gifts of tangible personal property, such as artwork, books, manuscripts, coin and stamp collections, boats and airplanes.

### **Bargain sale**

If you sell an asset such as real estate to the Bellevue Botanical Garden Society for less than its current fair market value, you will make a “bargain sale” gift. The difference between the fair market value and the sale price constitutes a charitable gift.

### **Charitable Lead Trust**

A lead trust makes payments to the Bellevue Botanical Garden Society for a designated period of time to support the purpose you choose. When the trust ends, the remaining assets are paid to you or other beneficiaries. A lead trust helps the Bellevue Botanical

Garden Society now and can reduce the tax cost of transferring valuable assets to family members.

## **Gifts for the Future**

### **Bequests**

You can include a gift to the Bellevue Botanical Garden Society in your will or trust.

### **Retained Life Estates**

You can contribute your residence, vacation home or farm now, while retaining the

right to use and occupy the property for life. At your death, the Bellevue Botanical Garden Society will own the property in its entirety.

**Life Insurance or Retirement Assets**

You can name the Bellevue Botanical Garden Society as the beneficiary of a life-insurance policy, your retirement account or IRA, and direct your future gift to a part of the garden of your choice.