

Dear Friend of LC Nature Park,

Each spring, Trillium flowers emerge along our woodland paths—nature's reminder that the most meaningful gifts take time to flourish. These cherished wildflowers spend years establishing roots before blooming faithfully for decades, creating a legacy that extends far beyond a single season.

Your planned gift to LC Nature Park follows this same principle. Like the patient Trillium, a legacy gift plants seeds today that will bloom generosity for generations.

Why Consider a Legacy Gift?

As a 100% supporter-funded park, we depend on generous individuals like you. While annual gifts sustain daily operations, legacy gifts create the foundation for our long-term mission—ensuring future generations will continue to experience nature's wonder and learn environmental stewardship.

Legacy giving also offers you meaningful benefits:

- **Flexibility** - Structure your gift to meet your financial goals and family needs
- **Tax advantages** - Potentially reduce estate taxes while maximizing your philanthropy
- **Lasting recognition & gratitude** - Become a member of our Trillium Society

Your Legacy Blooms Forward

Whether you choose a simple bequest, establish a charitable trust, or explore other planned giving options, your legacy gift ensures that LC Nature Park will continue welcoming visitors, protecting wildlife habitat, and fostering environmental education for decades to come.

The pages that follow outline various ways to structure your legacy gift, complete with sample language to share with your attorney or financial advisor. We're here to help you plant the seeds of conservation that will flourish for generations.

Thank you for considering how your legacy can help nature's story continue.

With gratitude,



Kelly Borgmann
Executive Director



Erin Ward, CFRE
Development Director

Bequest Information:

Our legal name and address are:

LC Nature Park, Inc. | 9744 Aboite Rd, Roanoke, IN 46783

Our Tax ID is:

#83-3990133

Contact Information:

Kelly Borgmann

Executive Director

260.999.3153

Kelly@LCNaturePark.org

Erin Ward, CFRE

Development Director

260.999.3153 EXT 3

Erin@LCNaturePark.org

SAMPLE LANGUAGE:

The sample statements below can be used for unrestricted bequests. If you would like more specific language that would align with interests you have, please let us know.

Sample #1: Percentage Bequest

"I give, devise and bequeath to LC Nature Park, Inc. (tax identification number 83-3990133), a charitable corporation located at 9744 Aboite Rd Roanoke, IN 46783, _____% of the rest and residue of my estate."

Sample #2: Residuary Bequest

"I give, devise and bequeath to LC Nature Park, Inc. (tax identification number 83-3990133), a charitable corporation located at 9744 Aboite Rd Roanoke, IN 46783, the rest and residue of my estate."

Sample #3: Bequest for a Specific Amount

"I give and bequeath to The LC Nature Park (tax identification number 83-3990133), a charitable corporation located at 9744 Aboite Rd Roanoke, IN 46783, the sum of \$_____."

Sample Bequest #4 Contingent Bequest

"In the event that (name or names; i.e., spouse, children, sibling, heirs) shall not survive me, or shall die during the administration of my estate, within ____ days from the date of my death, or as a result of a common disaster, then I give, devise and bequeath those beneficiaries' shares of my estate to The LC Nature Park (tax identification number 83-3990133), a charitable corporation located at 9744 Aboite Rd Roanoke, IN 46783"

Ways to Make Your Impact Today and Forever

You can use the following assets to fund a bequest:

- 1. Cash** - Cash is one of the most popular ways to support us during and after your lifetime through a specified sum or percentage of your estate. Options include:
 - **Outright gift** - Check, credit card, or money order for immediate needs
 - **Payable on death (POD) account** - Bank account or CD naming us as beneficiary
 - **Gift in will or trust** - Specific amount or percentage of your estate
 - **Charitable gift annuity** - Provides fixed payments for life while supporting our mission
 - **Donor advised fund** - Easy contribution via check or credit card
 - **Memorial/tribute gifts** - Honor someone whose life was touched by LC Nature Park or designate memorials in your name be directed to LC Nature Park
- 2. Appreciated Securities** - Securities in your will or trust often allow larger gifts than during your lifetime, with tax benefits when held over one year. Uses include:
 - **Outright gift** - Transfer through broker or mail certificates with stock power separately
 - **Transfer on death (TOD) account** - Designate percentage; beneficiary has no rights until after your lifetime
 - **Gift in will or trust** - Maintain flexibility while receiving dividends and voting rights
 - **Charitable gift annuity** - Reliable payments plus financial benefits
 - **Charitable remainder trust** - Sell assets without capital gains tax
 - **Charitable lead trust** - Freeze asset value while appreciation passes tax-free to heirs

3. Real Estate - Avoid administrative hassles by giving real estate through a bequest. Options include:

- **Outright gift** - Federal tax deduction equal to fair market value for property owned over one year
- **Gift in will or trust** - Flexibility to change your mind
- **Deferred charitable gift annuity** - Tax deduction when established (unmortgaged property preferred)
- **Bargain sale** - Sell for less than market value; difference counts as gift
- **Charitable remainder unitrust** - Income stream for life or up to 20 years
- **Charitable lead trust** - Transfer property to family tax-free while benefiting us
- **Endowed gift** - Creates perpetual support through annual distributions
- **Donor advised fund** - Avoid capital gains while receiving tax deduction

4. Tangible Personal Property Antiques, collections, or artwork can make suitable gifts. Tax benefits depend on mission-related use. Gifts over \$5,000 require qualified appraisal. Options include:

- Outright gift
- Gift in will or trust
- Bargain sale
- Memorial/tribute gift
- Charitable gift annuity

5. Closely Held Stock* - Stock gifts can be made anytime or through estate plans. Consult advisors for tax advantages. Examples include:

- **Outright gift** - Business documentation must permit additional owners and be debt-free
- **Benefits checklist** - You're majority shareholder, want to remove retained earnings without double taxation, maintain control, avoid capital gains, receive full deduction, and support our mission
- **Gift in will or trust** - Estate tax deduction if estate exceeds exemption
- **Charitable gift annuity** - Fixed payments plus benefits (requires appraisal over \$10,000)
- **Charitable remainder trust** - Annual payments for life or term of years
- **Charitable lead trust** - Estate/gift tax deduction for charitable portion

*Closely held stock requires special handling—consult legal or tax advisors first.



Trillium SOCIETY LC NATURE PARK



BEQUEST INTENTION LETTER & MEMBERSHIP ACCEPTANCE FORM

I/We wish to be recognized with membership in the **Trillium Society** and would like to join with other members to ensure the continued growth of LC Nature Park by leaving a lasting legacy gift.

NAME(s) _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

TELEPHONE _____ EMAIL(s) _____

I/We have provided for the future of LC Nature Park in the following manner:

- Bequest through will or trust
- Bequest of retirement plan assets
- Charitable lead trust
- Attached please find a copy of the page or paragraph that describes my future gift provision.
- Gift of life insurance
- Charitable remainder trust
- Other: _____

The estimated value (\$ or %) of my gift is/will be: _____ (optional)

My gift is to be used as follows: _____

If designation is not specified, estate gifts will be applied in accordance with the Park's Gift Acceptance Policy.

RECOGNITION DETAILS

Please list my/our name in the Trillium Society in the following manner:

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- You have my permission to include my name recognizing the **Trillium Society** membership.
 - I prefer that you do not include my name in public lists recognizing the **Trillium Society members. Please consider me an anonymous donor.**
 - You have my permission to use my name in publications (such as articles, newsletters, website) describing my gift and its positive impact on the future of LC Nature Park.

Investing in the future of LC Nature Park gives me/us great satisfaction in knowing that my/our gift will help create a better future.

Signature: _____ Signature: _____

Print: _____ Print: _____

Date: _____ Date: _____

When designating LC Nature Park in your estate plan, please use our legal name "LC Nature Park, Inc." IRS Tax ID 83-3990133.

Return form to LC Nature Park; Attn: Donor Relations Department; 9744 Aboite Rd. Roanoke, IN 46783 or contact Erin Ward at Erin@LCNaturePark.org or 260.999.3153 EXT 3.

