

## QUESTIONS TO CONSIDER

As you plan for the future and consider your legacy, here are a few questions to contemplate and help you prepare:

1. *Is the organization's mission important to me?*

Satisfaction is tied to the cause you believe in and value. Before making a gift, make certain it rests well in your heart. Then plan your gift to fit the mission you are most passionate about.

2. *Can I afford to make a planned gift?*

There are many ways to make a gift and accomplish your desired goals. Some planned gifts allow you to retain control of assets throughout your lifetime and modify your plans if your circumstances change. Making a gift of any type is a personal decision with which you and your family must be comfortable.

3. *What kind of assets can I give?*

For many this may be as simple as writing a check. However, securities or real estate may make more financial sense. Life insurance, amounts in an IRA or other retirement account might be most prudent. Look at each of your assets and not just income before giving.

4. *Which asset is best?*

Legacy gifts don't have to be made immediately. A gift using a trust or will that allows more flexibility for one's future needs may be more advantageous and practical.

For more information on making an important gift to Lauritzen Gardens, contact Rosemary at 402-346-4002 ext. 222, or use the reply form below.

5. *Are there tax benefits and consequences I should consider?*

When we think about the tax benefits when giving, it is important to look at the entire picture. Timing certain gifts, as well as giving assets that have a long-term capital gain, may work best. With proper planning, goals that seemed out of reach may be within reason.

6. *Who can help me develop a plan?*

Any gift that is important to you needs qualified legal and financial advice. Such gifts need the proper documentation and review by a professional to make sure your intentions are fulfilled. A Certified Public Accountant or estate-planning attorney can assure this.

7. *Is there someone at Lauritzen Gardens that I can visit with about this?*

Lauritzen Gardens has a gift planning office to help you when considering the variety of ways that you can support your favorite garden or program. Rosemary Lebeda, our director of gift planning can assist you.



(Please complete and return this form)

- Please send me more information on planned giving opportunities at Lauritzen Gardens.
- I/we have included Lauritzen Gardens in my estate plans wish to be included in *FloraVitae*.
- For recognition purposes, I/we wish to be listed as \_\_\_\_\_ as a member of *FloraVitae*.
- I/we wish to remain anonymous.
  
- Please contact me (us) via e-mail. My e-mail address is \_\_\_\_\_
- Please contact me (us) by phone at \_\_\_\_\_ The best time to call is \_\_\_\_\_

Name \_\_\_\_\_  
Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

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