



**“GIVING OPENS THE WAY FOR RECEIVING.”**  
**FLORENCE SCOVEL SHINN**

### Bequests

Interested in helping Schedel Gardens with our mission but feel overwhelmed by the thought of writing another check or giving up your assets today? A simple, flexible and versatile way to ensure we can continue our work for years to come is a gift in your will or living trust, known as a charitable bequest. By including a bequest to the Schedel Foundation in your will or living trust, you are ensuring that we can continue our mission for years to come. Your gift also entitles your estate to an unlimited federal estate tax charitable deduction.

### Insurance or Pension Gifts

Passionate about supporting Schedel Gardens with our mission even after your lifetime? It's not only possible, it's easy to do with a beneficiary designation. Just name the Schedel Foundation as a beneficiary to receive assets such as retirement plans and life insurance policies after you're gone. You simply fill out a form that is entirely separate from your will – which makes this approach an easy way to give. Not only is it an easy way to give, but it's also flexible – you aren't locked into the choices you make today. You can review and adjust beneficiary designations anytime you want.

*Please check with your personal financial advisor for what is best for you!*



[schedel-gardens.org](http://schedel-gardens.org)

## GIVING OPPORTUNITIES



  
**SCHEDEL**  
ARBORETUM & GARDENS

## Giving to Schedel Gardens

Every gift makes a difference at Schedel Arboretum and Gardens. Since our beginning in 1991, gifts of varied forms and sizes have helped to shape the Gardens into the outstanding botanical gardens it is now. Whether the gift is one dollar or one million, donors always choose whether to share an undesignated monetary gift or support to specific funds.

## Gifts can be made to Schedel Gardens using

**Cash:** A one-time investment via check or cash.

**Recurring Bank Transfers:** A scheduled contribution directly from your savings or checking account.

**Credit Cards:** A simple way to give by phone, mail or online.

**Securities & Mutual Funds:** Whether these funds are offered via paper or electronic transfer, any depreciated securities should be sold before gifting to realize the loss for tax purposes.

*No matter the size or form of your investment, the Schedel Foundation staff will help you to make the greatest possible impact with your investment. There are many different types of charitable giving tools to stretch your investment.*

**Matching Gifts** can more than double a gift if the donor's or spouse's employer offers such a benefit. Often, the process begins with a simple form from the employer's human resource or public relations office.

**Charitable Gift Annuities & Charitable Remainder Trusts** empower a donor to transfer a gift of cash, securities or property in exchange for a lifetime income.

**Charitable Lead Trusts** offer income to the Schedel Foundation for a set number of years, after which the remaining funds may be transferred back to the donor or heirs.

**Bequests** through a will or living trust enable a donor to commit a substantial gift after his or her lifetime. Such gifts should use the foundation's legal name, the Joseph J. and Marie P. Schedel Foundation.

**Insurance or Pension Gifts or Retirement Assets** are another option for making a significant impact, when donors name the Schedel Foundation as a direct or contingency beneficiary.

**Gifts-In-Kind** are tangible items such as plants, trees, fertilizer, sheds, event items, equipment, trucks, mowers, etc.

*Please contact Schedel Gardens at 419.862.3182 for more information about any of these gifting options.*

## Charitable Gift Annuities

When you are looking for ways to help Schedel Gardens with our mission, you shouldn't feel like you are choosing between your philanthropic goals and financial security. One gift that allows you to support the Schedel Foundation's work while receiving fixed payments for life is a charitable gift annuity. Not only does this gift provide you with regular payments and allow us to further our work, but when you create a charitable gift annuity with the Schedel Foundation you can receive a variety of tax benefits, including a federal income tax charitable deduction.

## Charitable Remainder Trusts

Looking for a way to give the Schedel Foundation a significant gift? If you have built up a sizeable estate and are also looking for ways to receive reliable payments, you may want to check out the advantages of setting up a charitable remainder trust.

**Benefits of a charitable remainder trust include:**

- A partial charitable income tax deduction
- Potential for increased income
- Up-front capital gains tax avoidance

**There are two ways to receive payments with charitable remainder trusts:**

The annuity trust pays you, each year, the same dollar amount you choose at the start. Your payments stay the same, regardless of fluctuations in trust investments. The trust pays you, each year, a variable amount based on a fixed percentage of the fair market value of the trust assets. The amount of your payments is redetermined annually. If the value of the trust increases, so do your payments. If the value decreases, however, so will your payments.

