Your giving helps further our mission!

The Dawes Arboretum…

- Was founded in 1929 by Beman and Bertie Dawes
- Spans more than 1,800 acres
- Offers more than 12 miles of trails
- Sees more than 250,000 visitors each year
- Reaches more than 18,000 people through educational programs
- Maintains over 16,000 labeled trees and shrubs within our collections
- Is open from 7am – sunset, 362 days a year (closed New Year’s, Thanksgiving and Christmas days)

- John Muir

“When a man plants a tree, he plants himself. Every root is an anchor, over which he rests…”

7770 Jacksontown Rd.
Newark, OH 43056
www.dawesarb.org
800.44.DAWES
The Dawes Arboretum was established by Beman and Bertie Dawes in 1929 through a planned gift—a charitable trust. You can help The Arboretum spread its “Roots” by following in their footsteps and leaving a legacy of your own to support our mission to increase the love and knowledge of trees, history and the natural world. By making a planned gift to The Arboretum, you become a part of our Roots Club, which comes with acknowledgement in our newsletter and invitations to special events in addition to the satisfaction of knowing you will leave the type of impact you desire in the world.

It is important to consult your attorney with questions about estate and tax benefits associated with your unique plans. While there are many other giving options that an estate planner can help you explore, some of the easiest methods for leaving the gift of a lifetime to The Arboretum are described below.

Types of Gifts

**Wills**

Having a will or revocable trust provides the peace of mind that comes from knowing you have taken care of the people you love and the causes in which you believe. Wills can typically be changed at any time. We offer the following bequest language as an example only. Your circumstances may require additional consultation from an estate planner. “I bequeath to The Dawes Arboretum, a nonprofit organization, formed and existing under the laws of the State of Ohio, with tax identification number 31-4379601, (written amount or percentage of estate) to be used for (unrestricted purposes or restricted for a particular program or area of The Arboretum).” If you are thinking about a restricted gift, we request that you or your attorney speak with The Arboretum’s Director of Development to ensure that we will be able to fulfill your wishes.

**Life Insurance**

Life insurance can be a convenient gift vehicle. The simplest option is to name The Arboretum as a beneficiary (primary or contingent). Changing beneficiaries is an easy process—just contact your insurance carrier to request a beneficiary form and list The Arboretum’s tax identification number (31-4379601) in place of a social security number. As with many bequests, you have the freedom and flexibility to change your mind—and your beneficiaries—at any time. Policy payments remain the responsibility of the donor.

**Retirement Assets**

If you pass away with retirement assets [from an IRA, 401(k), 403(b), pension or other tax deferred plan], those assets are subject to income taxes. As a non-profit organization, The Arboretum is often eligible to receive assets without tax obligations—giving you greater control to choose the legacy you want to leave. Often, donors elect to give such highly taxed assets to charity and less tax-burdened assets to heirs. To make beneficiary changes, just request the appropriate form from your employer or plan administrator.

**Other Types of Gifts**

The Arboretum can consider gifts of real estate under certain circumstances. The Arboretum does not have the capacity to administrate life income gifts (such as a gift annuity or charitable remainder trust), but encourages donors to work with a financial institution and name The Arboretum as a beneficiary of such assets. Contact us to further discuss your unique circumstances.

**Contact Us**

Should you arrange a planned gift to The Arboretum, please let us know! You need only provide information you are comfortable sharing. We would love to add you to our Roots Club and ensure that we are able to fulfill any unique wishes or designations you apply to your gift. Please contact the Development Office at 800.44.DAWES or development@dawesarb.org. The detachable panel to the right may be returned to The Arboretum as substantiation of your commitment for the Roots Club.

Thank you for leaving the gift of a lifetime to The Dawes Arboretum and welcome to the Roots Club! We are honored to help you ensure a legacy rooted in nature.

Name (as you prefer to be called):

Name (for recognition purposes, if different than above):

Address:

City, State & ZIP:

Phone:

Email:

Birthdate:

Have you designated your gift for a specific purpose? Please explain.

Your commitment qualifies you for our Roots Club. To inspire others to make planned gifts, we like to list club donors occasionally in publications, please select a preference.

☐ My name may be listed

☐ I prefer this gift remain anonymous

☐ I prefer all my giving remain anonymous

**Optional Information**

While you needn’t provide the following information, we find it helpful in understanding our donors and their wishes. Nothing you disclose is legally binding.

**Type of Gift (check all that apply):**

☐ Will ☐ Insurance Policy ☐ Retirement Plan

☐ Other Asset (please specify):

Estimated value of gift, as of today:

Gifts may be contingent on survival of other beneficiaries. Please list any contingency details:

We understand circumstances can change—please let us know if yours do.

Signature: _____________________________ Date: ______

Please return completed form to: The Dawes Arboretum 7770 Jacksontown Road Newark, OH 43056