



Jessica Anderson
Major and Planned Giving Officer
(630) 725-2146
janderson@mortonarb.org
4100 Illinois Route 53
Lisle, IL 60532

Advisor's Guide for Planned Giving

Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name The Morton Arboretum in your will or trust please use the following suggested language:

I, [name], give to The Morton Arboretum, an Illinois not-for-profit trust in Lisle, IL, the sum of [written dollar amount, or percentage of the estate, or description of property] for its general support, as determined by its Board of Trustees or President and CEO.

For more specific bequest language please consider the following:

I, [name], give to The Morton Arboretum, an Illinois not-for-profit trust in Lisle, IL, the sum of [written dollar amount, or percentage of the estate, or description of property] designated for [the support of an Arboretum program]. If it is ever impossible, impracticable, or inadvisable to use my gift in the manner set forth above, in the opinion of the Board of Trustees or the President and CEO of The Morton Arboretum, then my gift shall be used for alternative purposes that honors as closely as practical my original intentions.

Gifts of Appreciated Securities:

Please contact the Development Department for a stock transfer form.

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to the Development Department.

Legal name: The Morton Arboretum

Federal tax ID number: Please contact us for our federal tax ID number.

Located in: 4100 Illinois Route 53, Lisle, IL 60532-1293

Note to Attorneys, Accountants and other professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please call Jessica Anderson, (630) 725-2146, janderson@mortonarb.org.