

**Hoyt Arboretum Friends  
Planned Giving Form**  
*Confidential*

Thank you for notifying us that you have included Hoyt Arboretum Friends in your estate plans. Your gift is an important commitment to maintain and improve Hoyt Arboretum and its collection for all people.

We welcome you to Hoyt Arboretum Friend's (HAF) Sequoia Legacy Society Program. (Inclusion is without obligation). With your permission, we would like to recognize you in HAF publications. Please let us know how you prefer to be listed by checking one of the boxes below:

*Please list my/our names as I/we have printed them here:*

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*Please list me/us as "Anonymous"*

**About Your Future Gift:**

We have included the following two sections to help us honor your wishes when the time comes. The following section is optional.

1) "I have made the following charitable gifts to the Hoyt Arboretum Friends in my:" (please check all that apply.)

- Will (dated\_\_\_\_\_)
- Living Trust (dated\_\_\_\_\_)
- Life Insurance policy
- IRA or other pension fund
- Real Estate
- Charitable Trust
- Trust created in my will
- Other (Please describe)



2) We recognize that unanticipated events can result in life changes. By informing us of the current value of your gift, the HAF Board of Directors will be in a better position to plan for Hoyt Arboretum's future. This section is optional.

Description of Gift:

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Approximate Current Value of Gift

\$ \_\_\_\_\_

Special Instructions:

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**All information about your plans will be retained in the Hoyt Arboretum Friends' confidential files. Please note: this is NOT a legal document or binding pledge.**

Date \_\_\_\_\_

Donor

Signature(s) \_\_\_\_\_

Donor

Birthdate(s) \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_



**To leave a gift in your will, simply share the following sentence with your attorney or financial planner:**

*"I bequeath \$\_\_\_\_\_ or \_\_\_\_\_% of my estate to Hoyt Arboretum Friends, 4000 SW Fairview Blvd, Portland Oregon 97221, USA. Tax ID Number: 93-09-19495"*

Thank you again for your gift and intentions. If you have any questions about this form or would like to discuss your plans, we would be happy to assist you. Please call Anna Goldrich, executive director at:  
503-823-1648 or [Anna@hoytarboretum.org](mailto:Anna@hoytarboretum.org).

