



Leaving Your Legacy as a Bequest

Each individual situation is unique; therefore, these examples include only some of the possible gift opportunities. We encourage you to discuss your intentions with us to ensure that your wishes will be properly followed and recognized. The following language, provided to your attorney, is the simplest way to leave a legacy at your Gardens.

To give a specific bequest for unrestricted purposes

"I give and bequeath ___ % /the sum of \$_____ in cash/ _____ shares of _____ stock from my estate to Bok Tower Gardens, Inc., a nonprofit organization, 1151 Tower Blvd., Lake Wales, FL, 33853, to be used for the Gardens' general purposes."

To designate the Gardens as a contingent beneficiary

"If any or all of my heirs named herein under have predeceased me, I give and bequeath the portion of my estate reserved for that person or persons to Bok Tower Gardens, Inc., a nonprofit organization, 1151 Tower Blvd., Lake Wales, FL, 33853, to be used for the Gardens' general purposes as determined by the Board of Directors."

Designating the Purpose of Your Bequest

Unrestricted: The most useful type of bequest is unrestricted, allowing the funds to be allocated wherever the need is greatest and taking into account that changes (programs, laws, etc.) may necessitate a use that cannot be anticipated at the time of the gift.

It is the policy of the Gardens' Board of Directors to allocate all unrestricted gifts made through bequests to the general-purpose endowment. The Bok Tower Gardens endowment fund is managed to provide an income to support the Gardens in perpetuity.

Restricted: You may designate your bequest to support a special program or purpose that reflects your interests (specific departments, endowment, or programs).

If the bequest is restricted to a specific purpose, it is important that contingency wording be added to ensure that, in the remote possibility a specified purpose may cease to need funds in the future, an alternate use for the bequest may be determined.

To give a specific amount for specific purposes

"I give and bequeath the [sum of \$_____ in cash (or _____ shares of ____ stock)] from my estate to Bok Tower Gardens, Inc., a nonprofit organization, 1151 Tower Blvd., Lake Wales, FL, 33853, to be used for _____ at Bok Tower Gardens.

"If changed circumstances should at some future time make it impractical to continue administering the fund for the purpose designated, then the Bok Tower Gardens Board of Directors may redesignate the purpose—provided the terms adhere as closely as possible to my original intent."

To establish an endowed fund (\$500,000 minimum)

"I give and bequeath the [sum of \$_____ in cash (or _____ shares of ____ stock)] from my estate to Bok Tower Gardens, Inc., a nonprofit organization, 1151 Tower Blvd., Lake Wales, FL, 33853, to be used for the Gardens' general purposes to establish the _____ Endowed Fund. The portion of this fund available for spending each year shall be used to _____. Contributions may be added to the Fund at any time.

"If changed circumstances should at some future time make it impractical to continue administering the fund for the purpose designated, then Bok Tower Gardens Board of Directors may redesignate the purpose—provided that the terms adhere as closely as possible to the original intent."

Please contact Melissa Tyrone, Director of Philanthropy, at (863) 734-1213 with any questions, to discuss your intentions, and to share the news of your future gift.

Thank you!