

Because you have chosen to include MSHS in your legacy planning, you are invited to join the **MSHS Heirloom Circle** as our way of thanking you. As a member, you will receive special invitations and recognition, and your membership will be an inspiration to others.

### Member Information

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone: Home \_\_\_\_\_

Cell \_\_\_\_\_

Email \_\_\_\_\_

This letter of intent is an expression of my/our current plans. I/we understand that these plans may be modified or revoked at any time; this form is not a legal obligation binding on me/us or my/our estate.

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

\_\_\_\_\_ Date: \_\_\_\_\_

Please mail this form to:

Minnesota State Horticultural Society  
2705 Lincoln Drive  
Roseville, MN 55113  
Attn: Rose Eggert  
Chief Executive Officer

If you have any questions about this form, please contact Rose Eggert: 651-643-3601 ext. 201 or [roseeg@northerngardener.org](mailto:roseeg@northerngardener.org).

### Heirloom Circle Benefits

MSHS is pleased to recognize Heirloom Circle members by offering:

- Invitations to special events.
- Recognition in MSHS publications (unless you prefer to be anonymous).
- Special gatherings of Heirloom Circle members with MSHS board and staff leadership.
- **But, most of all, the satisfaction of knowing that you have made a significant contribution to the future of MSHS and new generations of gardeners.**

*If you are considering a legacy gift to MSHS or have already included the Society in your legacy planning, please return the enclosed reply form so that we can include you in the MSHS Heirloom Circle. Your gift will assist MSHS with its planning and inspire others to consider an investment in the Society's future.*

*Informing MSHS of your gift will allow us to recognize you for your generosity. Too often, legacy gifts go unrecognized because they come at the end of a donor's life. The Heirloom Circle provides a way for MSHS to recognize and thank legacy donors during their lifetime and to involve them more intimately in the Society's work.*

MINNESOTA STATE  
HORTICULTURAL  
SOCIETY

# Heirloom Circle

*Planting seeds that flourish  
for generations to come.*

MINNESOTA STATE  
HORTICULTURAL  
SOCIETY

2705 Lincoln Drive, Roseville, MN 55113  
651-643-3601 • 1-800-676-6747  
[www.northerngardener.org](http://www.northerngardener.org)





*The Minnesota State Horticultural Society  
Serving northern gardeners through  
education, encouragement and community.*

**M**SHS was founded in 1866 by visionary horticulturalists who sought a way to help northern gardeners be successful. Since that time, the Society has inspired, educated and connected gardeners and promoted community greening efforts. Like heirloom plants and tools, MSHS has been carefully nurtured and passed on to us by past generations of gardeners. Today, we benefit from their gifts.

Through the **MSHS Heirloom Circle**, you can continue this legacy – planting seeds that will flourish for generations to come. Heirloom Circle gifts provide ongoing revenue for programs, operational needs and special opportunities. Legacy gifts provide MSHS with long-term financial stability to inspire, educate and connect tomorrow’s gardeners, carrying a long tradition of service into a new age.

### *Gift Opportunities*

There are a variety of ways to make a legacy gift to MSHS and become a member of the Heirloom Circle.

#### **Wills/Charitable Bequests:**

After providing for your loved ones, you can make a bequest to MSHS through your will. Bequests can take many forms; the simplest is a general bequest naming MSHS as a beneficiary of some amount or percentage of your estate. Unrestricted gifts will best enable MSHS to use your gift to meet changing needs over time. However, if you wish to restrict your gift to a specific purpose, please contact us to discuss your intent.

#### **Retirement Assets:**

You can name MSHS as a beneficiary of all or a portion of your retirement funds. Since the tax burden on these assets can be substantial, using retirement fund assets to make legacy gifts is an attractive strategy for many donors.

#### **Life Insurance:**

The simplest way is to make MSHS the beneficiary of your life insurance policy. You can also make a gift of an existing or new policy, or create an irrevocable life insurance trust.

#### **Trusts and Annuities:**

Trusts can be set up to provide income to a charity such as MSHS over a specified period of time, with assets remaining at the end of this period distributed to the donor or other named beneficiaries. Trusts and annuities can also be established to provide income to the donor for some period, with assets remaining at the end period distributed to a charity such as MSHS.



Please contact your financial advisor to determine what is best for your circumstances.

In designating MSHS as a beneficiary, please use our full name: Minnesota State Horticultural Society.

**Our tax ID number is 410635199.**

To discuss any of these options or what you hope your gift will do for MSHS, please return the reply form or contact Rose Eggert, Chief Executive Officer at 651-643-3601 ext. 201 or [rose@northerngardener.org](mailto:rose@northerngardener.org).

## *Planting Seeds That Flourish for Generations to Come*

### **MSHS Heirloom Circle**

#### Confidential Declaration of Intent

The Minnesota State Horticultural Society (MSHS) is grateful for your commitment to our mission through your legacy gift. To ensure that our records represent your intentions, we appreciate any information that you are comfortable sharing with us. This form is revocable and nonbinding.

YES! I/we declare our intention to make a legacy gift to MSHS. By making this gift, I/we are supporting the future of MSHS and encouraging others to follow our leadership example.

Please check one of the following:

I/we give MSHS permission to publicly recognize my/our membership in the MSHS Heirloom Circle in printed materials. Please use my/our name as it is listed on this form.

I/we prefer to remain anonymous. Please do not list my/our name in your publications.

My/our legacy gift is in the form of a (please check all that apply):

- Will
- Trust
- Retirement Plan
- Life Insurance Policy
- Other: \_\_\_\_\_

