



Cornell Botanic Gardens  
Cornell University  
124 Comstock Knoll Drive  
Ithaca, New York 14850-2799  
[cornellbotanicgardens.org](http://cornellbotanicgardens.org)

## How to Establish a Bequest or Beneficiary Designation for Cornell Botanic Gardens

### STEP 1:

**Contact us about your gift intentions.** When you name Cornell Botanic Gardens in your Will or as the beneficiary of another asset, you decide how we should use your support. Of course, an unrestricted gift or a gift to be added to our general endowment will provide the greatest flexibility to meet our future needs. We can assist you in determining how to direct your gift so that it is most meaningful for you, and provide you or your attorney with suggested language. Contact Lynn Swain (607-255-7416 or email [lswain@cornell.edu](mailto:lswain@cornell.edu)), if you would like to explore opportunities to support a specific place or program at the Botanic Gardens.

### STEP 2:

**Bequest:** Create a new Will or trust and include a bequest for Cornell Botanic Gardens, or modify your present Will by adding a codicil. (*See sample language on next page.*)

**Beneficiary Designation:** Include Cornell Botanic Gardens as a beneficiary of your retirement plan, life insurance, or investment account. Here is the information you will need:

- Beneficiary: Cornell Botanic Gardens, Cornell University, Federal Tax ID: 15-0532082
- Mailing address: 130 E. Seneca St, Suite 400, Ithaca, NY 14850

Often, the plan documents will only allow the name and tax ID for a beneficiary organization. In that case, we typically also draft a Letter of Agreement to ensure that your future gift will be directed to the Botanic Gardens when it is realized. Call 800-481-1865 or e-mail [gift\\_planning@cornell.edu](mailto:gift_planning@cornell.edu) if you need assistance in obtaining and filling out the forms provided by your plan administrator.

### STEP 3:

**Notify Botanic Gardens or the Office of Trusts, Estates and Gift Planning about your intentions.** This gives us the opportunity to thank you now for your foresight and generosity. You will also be invited to join the Cayuga Society, which honors donors who have made planned gift commitments for Cornell. Of course, we will keep all specific information about your plans entirely confidential.

### STEP 4:

**Provide Botanic Gardens or the Office of Trusts, Estates and Gift Planning with a copy of your Will or beneficiary designation** (or the section that references your gift). This will allow us to ensure that your intentions are documented in our records, so that your gift will be administered as you intend when it is realized.

## Professional Assistance

The gift officers in Cornell's Office of Trusts, Estates and Gift Planning are charitable planning specialists, and will work closely with you and your advisors to achieve your philanthropic goals. Their services are confidential, collaborative, and provided without cost or obligation. Call 800-481-1865 or email: [gift\\_planning@cornell.edu](mailto:gift_planning@cornell.edu).

## BEQUESTS for Cornell Botanic Gardens: Sample Language for Your Will

### Bequest for an outright unrestricted gift:

"*{...dollars} {...percent} {all the rest, residue, and remainder of my estate}* to Cornell Botanic Gardens, a unit of Cornell University, an educational corporation in Ithaca, New York, for its general operating support."

### Bequest to create a permanent endowment for general operating support:

"... to Cornell Botanic Gardens, a unit of Cornell University, an educational corporation in Ithaca, New York, to establish an endowment fund to be known as the *{name of fund}*, the income from which shall be for the unrestricted use of Cornell Botanic Gardens."

### Bequest for a specific use:

... to Cornell Botanic Gardens, a unit of Cornell University, an educational corporation in Ithaca, New York, to be used for *{state purpose, e.g., ...development and maintenance of the horticultural collections –or– preservation and protection of the natural areas –or– educational programming...}*."

### Bequest for an endowment for a specific purpose:

... to Cornell Botanic Gardens, a unit of Cornell University, an educational corporation in Ithaca, New York, to establish an endowment fund to be known as the *{name of fund}*, the income from which shall be used for *{state purpose, e.g., development and maintenance of the horticultural collections –or– preservation and protection of the natural areas –or– educational programming...}*."

### If a specific use is stated, the addition of the following language will make certain that your gift will continue to support Cornell Botanic Gardens:

"If, in the judgment of the Trustees of Cornell University, changed circumstances should at some future time render the designated use of this gift no longer appropriate, then the Trustees shall direct use of the gift to further the objects and purposes of Cornell Botanic Gardens, giving consideration to my special interest as evidenced by the purpose described above."

## FOR MORE INFORMATION, PLEASE CONTACT

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