



The Gift of a Lifetime

Planned Giving is one of the ways that, simply by signing your name, you can help steward and strengthen Glen Helen for present and future generations. When you include the Glen Helen Association in your estate plans, you provide resources that carry the Glen into the future.

Glen Helen itself is the legacy of Hugh Taylor Birch, who cared so deeply for this wooded Glen that he sought to forever preserve it as a memorial to his daughter, Helen.

Today, a special community of supporters called the Glen Helen Legacy Society has made the ultimate commitment to carry on this legacy through Planned Giving. Your support helps ensure a healthy future for Glen Helen, including the plants and animals who call the Glen home and the generations of visitors who experience nature here.

It is important to consult with your attorney with questions about estate and tax benefits associated with your unique plans. While there are many other giving options that an estate planner can help you explore, some of the easiest methods for leaving a legacy gift to Glen Helen are described below.

Types of Gifts

Wills

Having a will or revocable trust provides the peace of mind that comes from knowing you have taken care of the people you love and the causes in which you believe. Wills can typically be changed at any time. We offer the following bequest language as an example only. Your circumstances may require additional consultation from an estate planner. "I bequeath to the Glen Helen Association, a nonprofit organization, formed and existing under the laws of the State of Ohio, with tax identification number 31-0963193, (written amount or percentage of estate) to be used for (unrestricted purposes or restricted for a particular program or area of Glen Helen)." If you are thinking about a restricted gift, we request that you or your attorney speak with the Glen Helen Association's Development Manager, Tracey Tackett, at 937-769-1902 or ttackett@glenhelenassociation.org, to ensure that we will be able to fulfill your wishes.

Life Insurance

Life insurance can be a convenient gift vehicle. The simplest option is to name the Glen Helen Association as a beneficiary (primary or contingent). Changing beneficiaries is an easy process – just contact your insurance carrier to request a beneficiary form and list the Association's tax identification number (31-0963193) in place of a social security number. As with many bequests, you have the freedom and flexibility to change your mind – and your beneficiaries – at any time. Policy payments remain the responsibility of the donor.

Retirement Assets

If you pass away with retirement assets [from an IRA, 401(k), 403(b), pension, or other tax deferred plan], those assets are subject to income taxes. As a nonprofit organization, the Glen Helen Association is often eligible to receive assets without tax obligation, giving you greater control to choose the legacy you want to leave. Often donors elect to give such highly taxed assets to charity and less tax-burdened assets to heirs. To make beneficiary changes, just request the appropriate for from your employer or plan administrator.

CDs, Bank Accounts, and Brokerage Accounts

Naming Glen Helen as the beneficiary of a certificate of deposit, a checking or savings bank account, or a brokerage account is one of the easiest ways to help protect the Glen. To name the Glen as beneficiary, ask your bank or credit union for the appropriate form.

Other Types of Gifts

The Glen Helen Association can consider gifts of real estate under certain circumstances. The Association does not have the capacity to administrate life income gifts (such as a gift annuity or charitable remainder trust), but encourages donors to work with a financial institution or community foundation and name the Glen Helen Association as a beneficiary of such assets. Contact us to further discuss your unique circumstances.

More Information

The Glen Helen Association team welcomes the opportunity to talk with you about ways to live a legacy rooted in nature. Our Development Manager, Tracey Tackett, can be reached at ttackett@glenhelenassociation.org, or 937-769-1902.