



Nathan Frank Society  
Forest Park Forever

# LEGACY GIFTS TO FOREST PARK FOREVER

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A GUIDE TO PLANNED GIVING

Prairie Boardwalk near Steinberg Skating Rink

# FOREST PARK


## A Civic Treasure Beloved By Families

Can you imagine St. Louis without Forest Park?

Over the past 140 years, **generations of St. Louisans** have considered these magnificent grounds their own backyard — a place to gather with family and friends, to connect with nature, to stay fit and healthy, to explore art, science, history and more.

First opened in 1876, Forest Park gained international prominence when the 1904 World's Fair came to its grounds. More than 20 million visitors from around the world took in the sights from the same Grand Basin we enjoy today.

While Forest Park fell into disrepair during the second half of last century, because of its **extraordinary rebirth** in the early 2000s it is again an incomparable destination in St. Louis — and one of the greatest urban parks in the world.



Did you know? Forest Park was recently voted the #1 City Park in the country by readers of *USA Today*!



# BEAUTIFUL & FOREVER

## Because of Generous Donors Like You



Since its founding in 1986, **Forest Park Forever** has led the Park's comeback, raising more than \$190 million through gifts large and small for its restoration, maintenance and endowment. Our team — which includes trained horticulturists and ecologists — partners with the City of St. Louis to care for the Park each day, while also raising funds necessary to ensure its future for generations to come.

As a nonprofit organization, Forest Park Forever depends entirely on **generous members and donors**. Contributed dollars go toward caring for thousands of trees and planting thousands of flowers each year, completing ongoing maintenance and special capital projects, educating teachers on how Forest Park can be their classroom and so much more.

The Forest Park Forever donor family includes generous individuals who provide **legacy gifts** through planned giving and membership in the **Nathan Frank Society**. Because Forest Park Forever is focused on the very long term — our work will impact our children's children — legacy gifts are essential. They are the bridge to Forest Park's next generation of visitors.

# What Legacy Do You Want to Leave?

There are a range of planned gift opportunities — or legacy gifts — for supporting Forest Park Forever, including:

## Bequests

With just a few sentences in your will or trust, you can designate a portion of your estate or make a specific bequest by giving a certain amount of cash, securities or property to the Park. Bequests are a simple and popular way to make a planned gift.

## Beneficiary Designations for Life Insurance or Retirement Plans

You can name Forest Park Forever as a beneficiary of a retirement plan or life insurance policy. Your plan or policy may be worth more to the Park than to your heirs because of income and estate taxes.

## Charitable Gift Annuities

Make a donation in exchange for a fixed annuity payment each year for life.

## Charitable Trusts

By creating a charitable trust, you can provide long-term benefits to the Park and, depending on the type of trust, a partial or full amount will be deducted from your estate base and may save income taxes.

**Request Information:** If you would like more information about these or other planned giving opportunities, please contact us today. Learn how to reach us on the inside back cover.



*“We must continue to maintain and improve this oasis for future generations to enjoy, as we have. Our bequest to Forest Park Forever is our small way to contribute to the continual funding needed to meet this promise.”*

— Mary & Tom DeBenedetti  
Nathan Frank Society Members

# Matching a Goal to a Gift

Understanding that each family may have a unique goal in mind when making a planned gift to Forest Park Forever (FPF), we offer this matrix charting goals to benefits:

GOAL	STRATEGY	BENEFITS
Support the Park's future without affecting your current cash flow or portfolio.	Put a <b>bequest</b> in your will or living trust (cash, specific property).	Give a gift that has no current cost to you, while ensuring a future estate tax deduction.
Donate a tax disadvantaged asset.	Name FPF as a beneficiary of your <b>retirement plan</b> , leaving other assets to family.	Eliminate income tax on retirement plan assets and free up other property to pass on to heirs.
Get an income stream from the assets you give to FPF.	Create a <b>charitable gift annuity</b> or a <b>charitable remainder trust</b> .	Receive lifetime income and a charitable deduction.
Pass assets to your children and grandchildren on a tax-favorable basis.	Create a <b>charitable lead trust</b> , which supports FPF for a fixed period and then goes to your family.	You reduce gift and estate taxes and freeze the taxable value of assets before they pass to your family.

Disclaimer: Forest Park Forever does not provide legal or tax advice. You should consult with your attorney or tax advisor to determine the benefits and risks of any planned gift. This document and other information about gifts to Forest Park Forever are not intended to be used to avoid tax liability.

# Planned Gifts FAQ

— John O’Gorman,  
Senior Vice President, Development



## What is a planned gift?

A planned gift is a major gift, made during life or at death, generally as part of the donor’s overall financial, tax and/or estate planning.

Planned gifts are usually gifts of assets, as opposed to income, and often allow donors to make larger gifts to Forest Park than they normally could make from income.

## What is a deferred gift and how is it different from a planned gift?

A deferred gift is a type of planned gift. Deferred gifts are planned gifts designed to benefit the Park in the future.

## Why is it important that I notify Forest Park Forever when I include the Park in my estate plan?

We are honored by each donor who includes Forest Park in an estate plan, and we value the opportunity to recognize and thank these generous individuals. For this purpose, Forest Park Forever created the Nathan Frank Society, comprised of donors who have made provisions for the Park in their estate plans. We would like all such donors to have the opportunity to participate in this meaningful giving society that is securing Forest Park’s future.

## Even though my gift is deferred, will I be able to specify how my gift is to be used?

Yes. At the time the gift is planned, our staff will work with you to make sure that your gift is used according to your wishes.

### Forest Park Forever Planned Giving Advisory Committee

- Martin E. Galt III, Chairman, The Commerce Family Office
- Paul Higgins, Managing Director, Stifel Financial Corp
- Julie Thomas Sward, J.D., AEP®, CFP®, Partner, The Moneta Group
- Jason P. Thein, J.D., Partner, Thompson Coburn LLP
- Chris Williams, Head of Private Wealth: Missouri, The PrivateBank

# How to Join

## the Nathan Frank Society and Give a Gift

The team at Forest Park Forever will make it easy for you to join the Nathan Frank Society and leave a planned gift to support the Park's future:



### ONLINE

**[forestparkforever.org/planned-giving](https://forestparkforever.org/planned-giving)**

Securely join the Society online and tell us more about your gift plans.



### CALL US

**314.367.7275**

Ask to speak with John O'Gorman,  
Senior Vice President, Development



### IN PERSON

#### **Forest Park Forever Office**

Dennis & Judith Jones Visitor  
and Education Center  
5595 Grand Drive in Forest Park  
St. Louis, MO 63112

Our regular office hours are 8:30 a.m. - 5:00 p.m., Monday through Friday (excluding holidays). If you plan to visit in person, phoning John O'Gorman ahead of time will ensure a productive meeting.

## More Questions?

Contact John O'Gorman, Senior Vice President, Development,  
at 314.367.7275 or email us at [plannedgiving@forestparkforever.org](mailto:plannedgiving@forestparkforever.org).  
All requests for information will remain confidential.

## Thank you!

Your financial support will ensure that Forest Park remains  
beautiful and accessible for generations to come.





Forest  
Park  
Forever™

Restoring, maintaining and sustaining  
Forest Park — now and forever.

[forestparkforever.org](http://forestparkforever.org)

Victorian Bridge