



Invest in the
future of

Vermont's
past



Give the gift of history to future generations . . .



I believe most of us leave our legacy through strengthening institutions that project our values, what we hold important, and secure them for future generations. For that reason, Carol and I have named the Vermont Historical Society as a beneficiary of a Charitable Remainder Unitrust. We want to assist those who follow us to understand their heritage as part of valuing and understanding themselves, and in Vermont, the Society does that the best.



—H. Nicholas Muller, VHS Trustee

Then, I thought that with the few assets I've managed to accumulate, what better way to use them than for an organization that will be here forever, that will be here permanently and that meets the tenets of preserving, collecting and utilization.



—Alan Weiss, VHS Member

Each of us leaves a legacy through a lifetime of words, deeds and accomplishments. Your own legacy will live well beyond your lifetime, providing for your needs and your loved ones.



The Vermont Historical Society Legacy Circle

When your will or estate plan includes the Vermont Historical Society, you may, if you wish, become a member of the Vermont Historical Society Legacy Circle.

Benefits:

- A Vermont Historical Society Legacy Circle membership certificate
- Invitations to special Circle programs
- Inclusion in Legacy Circle member list
 - You'll inspire others to give the gift of history to future generations.

Your legacy will live on.

Thank you!





You may include the Vermont Historical Society in your estate plans in many ways. The best option for you depends on your goals:

- remove taxable assets from your estate
- generate income for you
- reduce your taxes
- make it possible to support the VHS more than you can during your lifetime

Bequest

Making a bequest is easy. You can amend an existing will or draft a new one, leaving some or all of your estate to VHS, reducing estate taxes and preserving our heritage beyond your lifetime.

A bequest is simple wording in your will, such as: *"I give, devise, and bequeath to Vermont Historical Society, Inc. a nonprofit organization in Barre, Vermont, the sum of \$_____ (or describe any real or personal property) to be used for general purposes."*

Thank you for your consideration.

Gift of Retirement Plan

You can name the Vermont Historical Society as the beneficiary of your IRA, 401(k) or 403(b) or other retirement plan. Simply contact your plan administrator for a change of beneficiary form. There will be no tax due on the distribution that comes to VHS.

Gift of Life Insurance

You can name the Vermont Historical Society as a full or partial beneficiary of your life insurance policy. Simply contact your plan administrator for a change of beneficiary form. Or, if it's a policy you no longer need, you can make VHS the owner of the policy by filing a change of ownership form. You will receive a tax deduction for the policy's cash surrender value or replacement cost. Premiums you pay after making VHS the owner of the policy are also tax-deductible.

**To discuss any of these options,
please contact Jane Campbell at
(802) 479-8516
or jane.campbell@state.vt.us.**

There is no obligation, and your inquiry will be kept confidential.

Please consult with your attorney or financial advisor to ensure that the option you choose is the best for you.



Gifts that provide income

\$ Charitable Gift Annuities

When you set up an annuity, you receive a fixed amount of income annually for the rest of your life, some of which is tax-free—you also receive a charitable deduction and save on estate taxes. At the end of the annuity, the remaining principal passes to the VHS or generates income for the VHS.

You also may consider a “deferred gift annuity,” which gives you annuity income at a future date, perhaps in your retirement, to receive the annuity income at a higher rate of return.

\$ Charitable Remainder Trust

With this trust, you and/or other beneficiaries receive a fixed annual sum or fixed percentage of the trust’s value each year. The income can be for life or a term of years, with the remaining assets eventually benefiting the VHS. When you establish the trust, you can receive a tax deduction for part of your gift.

\$ Charitable Lead Trust

Perhaps you wish to support VHS while passing assets to your children with reduced or no transfer taxes. If you have assets you don’t need to meet your annual needs, you could use them to fund a charitable lead trust which would make annual payments to VHS during the term of the trust, then pass the remaining assets to your children or other loved ones. By carefully constructing the trust payout and term, you can greatly reduce or even eliminate all transfer taxes on your gift to the children, including any unrealized appreciation the trust might have on its holdings.



Please return this form to:
Jane Campbell, Director of Development
Vermont Historical Society
60 Washington Street
Barre, VT 05641

Name(s) _____

Address _____

City, _____ State _____ Zip _____

Daytime phone _____

Email _____

I/We have included the Vermont Historical Society in my will or estate plan.

I/We would like to be included in the Vermont Historical Society Legacy Circle.

Please use the following name(s) in all acknowledgments: _____

I/We wish to remain anonymous.

I/We would like more information about planned giving opportunities at the VHS. Please contact me.

Comments or Special Requests:



Mission

The Vermont Historical Society engages both Vermonters and “Vermonters at heart” in the exploration of our state’s rich heritage.

Our purpose is to reach a broad audience through our outstanding collections, statewide outreach and dynamic programming.

We believe that an understanding of the past changes lives and builds better communities.



Since 1838

Vermont History Center
60 Washington Street • Barre, VT 05641

Vermont History Museum
109 State Street • Montpelier, VT 05609

www.vermonthistory.org/plannedgift
(802) 479-8500

*The Vermont Historical Society
is a tax-exempt 501(c)(3) nonprofit.*