

# THERE ARE MANY REASONS AND WAYS TO GIVE

## MAKE A PLAN

Your long-standing support for the Society has likely been through cash gifts. You may wish to also consider making a planned gift to the Society that avoids use of assets now that you and your loved ones might need in the future. A variety of planned options offered by the Wisconsin Historical Foundation, the funding arm of the Society, are described inside.

## MAKE A DIFFERENCE

When you include the Society in your estate plans, you help ensure that the priceless evidence of the past is available for future generations. Planned gifts provide the long-term financial stability necessary to maintain the level of excellence that has earned the Society a position of national prominence.

## CREATE A LEGACY

The Society is charged with documenting the history of Wisconsin and it has been fulfilling this mission since 1846—your commitment to the Society’s long-term success deepens your roots in our state. Your planned gift to the Society makes your legacy the preservation of Wisconsin’s legacy.

 **LOOK INSIDE TO UNCOVER PLANNED GIFT OPTIONS AND THE BENEFITS THEY OFFER TO YOU AND THE WISCONSIN HISTORICAL SOCIETY.**

“Since the 1850s the Society has been funded by a combination of public and private funds. As an emeritus member of the Society’s Board of Curators, I understand how important it is to provide an ongoing, continuous private funding stream for the Society. The bequest Janet and I have set aside will carry on our involvement in the Society long into the future.”

—Mark and Janet Gajewski



“I have proudly contributed to the Wisconsin Historical Society for years. I also created a plan to provide an added legacy of support through a bequest in my will. I did this as a sign of the deep regard I have for all that the Society staff and volunteers do to collect, preserve and share our state’s stories. I believe passionately in the value of history and the need to share these stories for many generations to come. My planned gift will provide reliable future support for the Society and ensure resources are available for the organization to maintain the high level of excellence it has achieved throughout its long history.”

—John Evans



*“If you don’t know history...you are a leaf that doesn’t know it is part of a tree.”*

—Michael Crichton

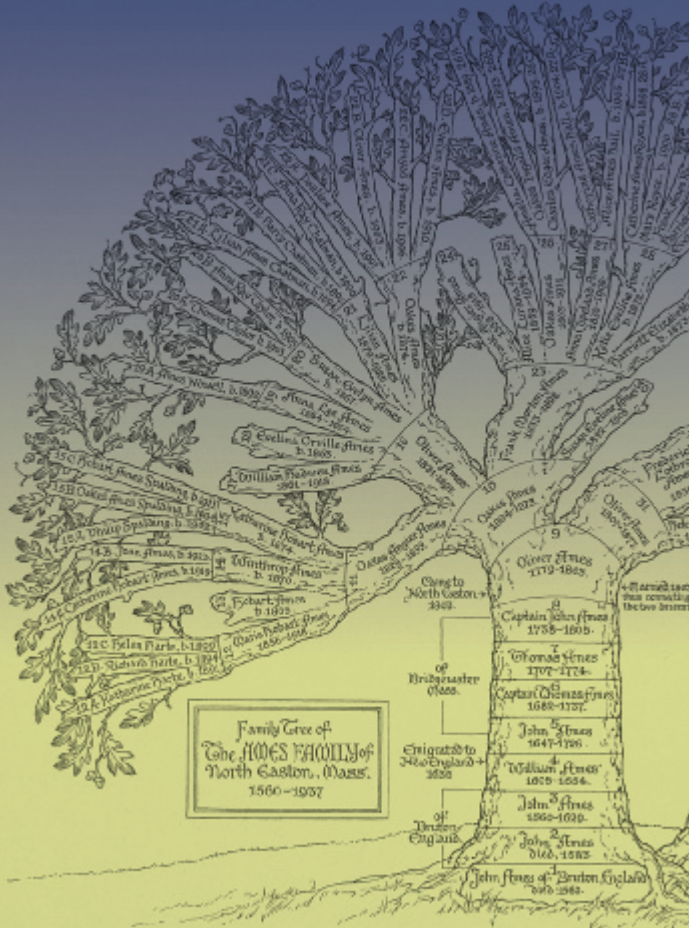


**Interested in learning more? Please contact us.**  
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**Wisconsin Historical  
FOUNDATION**



**MAKE A PLAN  
MAKE A DIFFERENCE  
CREATE A LEGACY**

# A PLAN THAT WORKS FOR YOU

Your Gift	Your Goal	How You Make the Gift	Your Benefits
<b>Simple Gifts Anyone Can Make</b>	Your Will or Trust  A Beneficiary Designation	<ul style="list-style-type: none"><li>• Defer a gift until after your lifetime.</li><li>• Work with your attorney to add a few simple sentences to your will or living trust detailing your donation to the Society.</li><li>• Designate the Society as beneficiary of a percentage of your retirement plan, health savings plan or life insurance policy.</li></ul>	<ul style="list-style-type: none"><li>• Maintain your current lifestyle while making a meaningful gift to support the Society.</li><li>• Enjoy flexibility to change your plans as life changes.</li><li>• Pass your retirement plan assets to the Society tax-free.</li></ul>
<b>Gifts of Assets</b>	Stock or Other Securities  Real Estate	<ul style="list-style-type: none"><li>• Make a gift now or in the future that provides tax benefits.</li><li>• Enables a larger gift with little or no effect on cash flow.</li></ul>	<ul style="list-style-type: none"><li>• Give stock or securities that have increased in value directly to the Society.</li><li>• Donate appreciated real estate.</li><li>• Receive immediate income tax benefits.</li><li>• Eliminate capital gains taxes on assets that have increased in value.</li><li>• Transfer the expense of insuring or maintaining assets you no longer need.</li></ul>
<b>Gifts That Pay You Income</b>	Charitable Gift Annuity*	<ul style="list-style-type: none"><li>• Supplement your own retirement income or provide an income stream with steady payments.</li><li>• Receive payments that are partially income tax-free.</li></ul>	<ul style="list-style-type: none"><li>• Make a donation of cash or securities to benefit the Society and receive fixed payments for life.</li><li>• Receive current and future savings on income taxes.</li><li>• Enjoy tax savings on a portion of each payment you receive.</li></ul>
<b>Gifts That Pay Income and Protect Assets</b>	Charitable Remainder Trust  Charitable Lead Trust	<ul style="list-style-type: none"><li>• Supplement your own retirement income or provide an income stream to the Society for a set number of years.</li><li>• A charitable remainder trust lets you enjoy payments now, while the balance eventually goes to the Society.</li><li>• A charitable lead trust pays income to the Society for a set number of years, then the balance passes to your heirs.</li></ul>	<ul style="list-style-type: none"><li>• Receive dependable payments now, or the Society receives a supplemental revenue stream.</li><li>• Get an immediate income tax deduction with a charitable remainder trust.</li><li>• Reduce your taxable estate and often reduce gift taxes with the charitable lead trust.</li></ul>

## Inspire Others by Joining Today



Robert B.L. Murphy

In his lifetime, Robert B.L. Murphy was a lifelong Wisconsin Historical Society benefactor and his legacy lives on through a generous planned gift.

The Robert B.L. Murphy Legacy Circle was created to honor his many contributions as a leader of the Society and to recognize individuals who have included the Society in their estate plans. Members of the Murphy Legacy Circle are a distinguished group of supporters and we deeply value their lasting contributions.

In addition to the tax benefits of a planned gift, members enjoy:

- Lifetime subscriptions to the award-winning *Wisconsin Magazine of History* and *Columns*, the Society's quarterly newsletter
- Invitations to exclusive events, including the Murphy Legacy Circle recognition luncheon held annually in spring
- Donor listing recognition in the special annual report issue of *Columns*

Contact us at (608) 261-9364 or [plannedgiving@wisconsinhistory.org](mailto:plannedgiving@wisconsinhistory.org) to learn more about leaving a legacy gift.