

## **The Peace Light Legacy Program** *Planned Gifts that Ensure Our Future*

The history of Gettysburg and Adams County is built on the legacies of those who came before us. With the help of many generous supporters across the nation, the Adams County Historical Society (ACHS) now has a proper home to share and preserve its vital community stories. By visiting the Historical Society's new archives, library, event center, and nationally acclaimed *Beyond the Battle Museum*, millions of visitors and community members of all ages will continue to find inspiration from our shared past.

Planned Giving is a way to help ensure that the mission of the Adams County Historical Society continues for generations to come. The Peace Light Legacy Program has been established to honor individuals who have committed to support ACHS through deferred gifts, and who have informed us of their intentions.

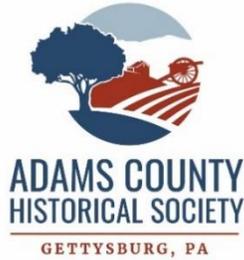
Methods of giving include:

- A bequest to ACHS in your will or living trust
- Naming ACHS as the beneficiary of a qualified retirement plan or IRA
- Naming ACHS as the beneficiary of a life insurance policy
- Naming ACHS as the beneficiary of a charitable gift annuity
- Naming ACHS as the beneficiary of a charitable trust

Members of the Peace Light Legacy Program will be invited to special events and recognized in various ways. If you have made arrangements for ACHS to receive a gift through your will or another form of deferred giving, please complete the reverse side of this paper and return it to ACHS.

If you have any questions about our planned giving program, or need help establishing your Legacy Gift, please contact ACHS at 717-334-4723, or by email at [info@achs-pa.org](mailto:info@achs-pa.org).

***Take your place in history with a gift that lasts beyond your lifetime.***



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This is to acknowledge that I made the appropriate arrangements for the Adams County Historical Society to receive a Legacy Gift.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
\_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Planned Gift Type:

- \_\_\_\_\_ Bequest in Will or Living Trust
- \_\_\_\_\_ Beneficiary of Qualified Retirement Plan or IRA
- \_\_\_\_\_ Beneficiary of Life Insurance Policy
- \_\_\_\_\_ Charitable Gift Annuity
- \_\_\_\_\_ Charitable Trust

Please provide any additional information that we should be aware of:

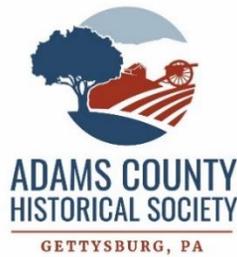
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Thank you for becoming a member of the Peace Light Legacy Program to support the future of the Adams County Historical Society.

*This statement of intent is non-binding.*



## **The Peace Light Legacy Program Steps for Making a Bequest**

The Adams County Historical Society can help you share and preserve history for future generations.

If you wish to make a planned gift, we recommend that you meet with your attorney, financial advisor, or estate-planning professional to discuss your options.

### **Understanding Ways to Give**

#### **Name the Adams County Historical Society as a beneficiary.**

The Adams County Historical Society welcomes gifts of a remainder interest in an IRA or other qualified retirement plan. For some people, these can be the most highly taxed assets they own since retirement plan assets can be subject to both estate and income taxes. The Adams County Historical Society is a tax-exempt public charity, so when you name us as a beneficiary of your qualified retirement plan, these assets can pass to the us without being taxed. Similarly, when you name the Adams County Historical Society as a beneficiary of your life insurance policy, the assets pass to us tax free. Please contact your own Retirement Plan Administrator for a beneficiary designation form. The Adams County Historical Society's tax ID number is #23-7258494.

#### **Make a gift through your will or living trust.**

Before you meet with your attorney about your will or living trust, we suggest that you become familiar with the ways you can make a bequest:

- A specific bequest directs a dollar amount or particular assets, such as securities, real estate, tangible personal property.
- A residuary bequest directs all or a percentage of the remainder of your estate, after specific amounts bequeathed to other beneficiaries are distributed and estate-related expenses are paid.
- A testamentary trust can be helpful for you and your family as well as for the Adams County Historical Society. A lead trust saves estate taxes by providing annual payments in lieu of taxes; the remaining amount goes to your family or friends. A remainder trust provides payments to your surviving family members

or friends for life or a set term, with the remainder going to the Adams County Historical Society.

**Think about your Peace Light Legacy gift.**

A gift to the Adams County Historical Society may memorialize a friend or relative or carry in perpetuity the name of the donor.

- An unrestricted bequest allows the Adams County Historical Society to determine how to use the funds. If you prefer to make an unrestricted bequest, we suggest the following sample language: “I give and bequeath to the Adams County Historical Society, a Pennsylvania non-profit, the sum of \$\_\_\_\_\_ to be used for the general purposes of the Adams County Historical Society at the discretion of the Board of Trustees.”
- A restricted bequest directs assets to a specific fund, a particular purpose, or non-profit. Please be aware there are some legal and practical considerations as you plan a restricted bequest to the Adams County Historical Society. If you are considering designating your bequest for a specific purpose, we suggest that you speak with Andrew Dalton, Executive Director of the Adams County Historical Society.

**Take Your Place of Honor in the Peace Light Legacy Program.**

Please let us know when you have included us in your will or as a beneficiary of your retirement plan or life insurance policy. That is all we need to welcome you as a member of our Peace Light Legacy Society.

**Thank you for considering a planned gift to the Adams County Historical Society through your estate plans. If you have further questions, please call us at 717-334-4723.**