

LABORDAY
CREATIVE



Planned Giving Mailer



Maryellen Jones Photography

Dear Friend,

As I address these words to you, I feel I am talking to a friend and a partner – one whose appreciation of the past and sense of stewardship for the future will lead you to consider a legacy gift to the Hingham Historical Society.

I would like to personally invite you to join the 1914 Society, whose members are valued not only for their powerful generosity but also for their vision and commitment.

It is a special person indeed who is motivated to care so deeply about the future of our organization. As you consider a legacy gift, we can help you with the many ways you can meet your personal planning objectives while also achieving your charitable goals for the Hingham Historical Society. We hope you will reach out with any questions and I look forward to welcoming you as a new 1914 Society member soon.

Thank you for your past generosity and involvement in the Hingham Historical Society. You are the future of Hingham History!

Sincerely,
Jane Carr

Making a planned gift to the Hingham Historical Society

For more information on how to make a planned gift to the Hingham Historical Society and becoming a member of the 1914 Society, or to inform us of your existing plans that name the Society as a beneficiary, please use the enclosed reply card and envelope.

You may also contact the Development office:

- ☎ 781-749-7721 x7
- ✉ development@hinghamhistorical.org
- 🌐 hinghamhistorical.org/planned-giving

Please note that the information included here is not intended as legal advice, and you should consult with your attorney and financial planner when making a planned gift. We look forward to welcoming you as a new member of the 1914 Society!

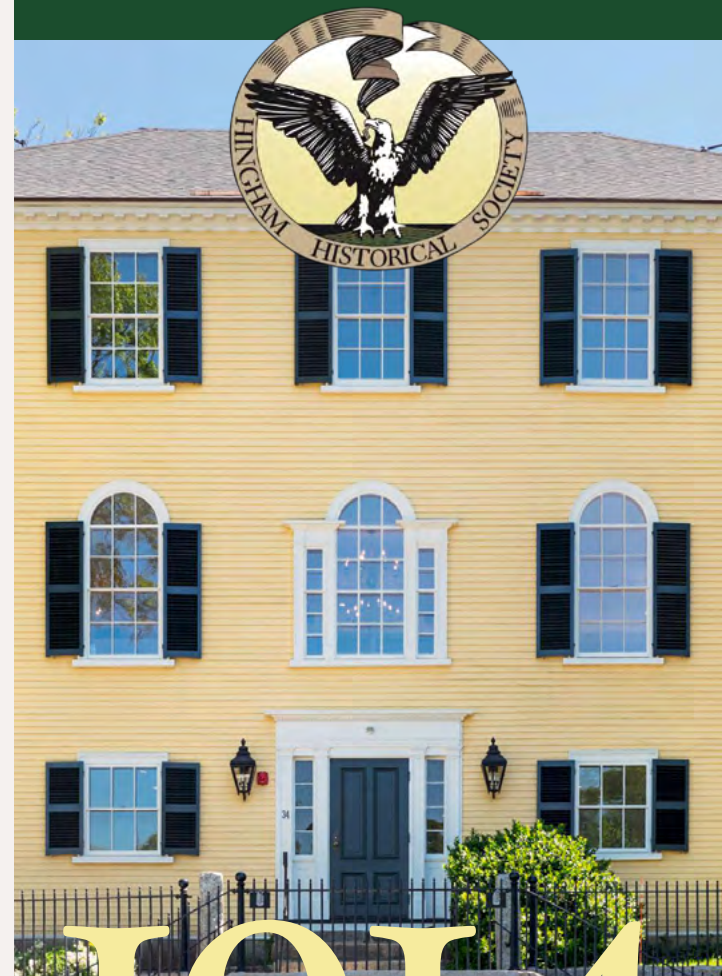


Hingham Historical Society

34 Main Street
P.O. Box 434

Hingham, MA 02043

hinghamhistorical.org



1914 SOCIETY

You made Hingham home.

**Make Hingham part
of your legacy.**

Examples of planned gifts

There are a number of planned giving options that can help you realize your own philanthropic goals while ensuring the future financial stability of the Hingham Historical Society.



Gifts now

Gift of Appreciated Stock

The gift of appreciated securities is most often in the form of common stock or mutual funds. Such a gift is a valuable way to benefit the Society and for you to receive tax benefits based on the fair market value of the securities.

Gift of Life Insurance

Make a gift or buy a policy making the Society the owner and beneficiary.

Gift of Real Estate

Real estate may be deeded outright to the Society or left by bequest. The irrevocable gift of property may provide an immediate tax deduction and avoid capital gains. Due to complexities, be prepared to work with the Society and qualified advisors to ensure that this is a suitable gift for both you and the Society.



Gifts that pay income

Charitable Gift Annuity

The gift annuity is an irrevocable gift of cash or securities where you receive a predictable fixed income for life. At termination, the Society receives the residual value of the annuity. There are also potential tax benefits depending upon your particular situation.

Charitable Remainder Trust

The remainder trust is an irrevocable gift of assets into a charitable trust that provides you a fixed (annuity trust) or variable (Unitrust) income for life or for a set term. At the trust's termination, the trust assets become a generous gift to the Society. There are also tax benefits dependent upon your situation.

Charitable Lead Trust

The lead trust's income payments are distributed to the Society for a set period of years, after which the assets are transferred back to the grantor or whomever the grantor has named the beneficiary. This provides generous annual support to the Society now, removes the asset from the estate and passes an asset to heirs with little or no tax. There is no immediate deduction for the lead trust.

Gifts later

Bequests

A bequest is a gift made through a will or trust and is an easy, practical way to make a meaningful financial contribution to the Society without affecting your current finances. A bequest may be made for a specific dollar amount or piece of property, for a percentage of your estate, or for part or all of what remains of the estate after other bequests are carried out.

Retirement Plan Beneficiary Designation

In some cases, retirement assets can be the heaviest assets taxed in an estate. Naming the Society as beneficiary can avoid that taxation, enabling the asset to pass tax free to the Society. You may designate the Society a percentage beneficiary or a contingent beneficiary of a retirement plan.

Bank or Investment Account

Financial accounts can be a simple and inexpensive way to leave a legacy gift for the Society. Contact your financial advisor to see how easy the process is to make the Society beneficiary of a particular investment or bank account.



Leave a Legacy in Hingham

1914
SOCIETY

I / We would like to:

- Learn more about planned gifts and the 1914 Society
- Inform the Hingham Historical Society of our planned gift

Please see the reverse side of this card for more details.

NAME(S)

ADDRESS

CITY

STATE

ZIP

PHONE

EMAIL

I/We would like to:

Learn more about my planned giving options and becoming a member of the 1914 Society

Learn more about a specific planned gift option

Please mark all that apply →

Inform the Hingham Historical Society of my/our planned gift and my membership in the 1914 Society

Please mark all that apply →

Wills and Bequests

Charitable Gift Annuity

Gift of Life Insurance

Gift of Real Estate

Gift of Appreciated Stock

Retirement Plan Beneficiary Designation

Charitable Remainder Trust

Charitable Lead Trust

Bank or Investment Account

Other _____

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development@hinghamhistorical.org



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1914 Society
Hingham Historical Society
P. O. Box 434
Hingham, MA 02043

PLACE
STAMP
HERE



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ADDRESS _____

CITY _____ STATE _____ ZIP _____ EMAIL _____

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AN INVITATION FROM OUR BOARD

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