



JOIN THE LEGACY DONOR SOCIETY THROUGH PLANNED GIVING

YOUR OPPORTUNITY TO SECURE MARBLEHEAD MUSEUM'S FUTURE

Planned giving provides opportunities for donors to support Marblehead Museum while receiving tax and other financial benefits. There are several options that help to ensure a secure future for the museum while meeting your financial goals and also providing you with a legacy of support for Marblehead history.

BEQUESTS

Bequests are a meaningful way to support the Marblehead Museum and help to provide for its future. Bequests may be unrestricted or designated for a particular purpose. Including the Museum in your will insures that your wishes will be honored. Bequests may take numerous forms, including:

CASH BEQUEST: You give a specific dollar amount donation.

SPECIFIC BEQUEST: You give specific assets, such as securities, an interest in real estate, or tangible personal property (e.g. works of art, antiques, etc.)

RESIDUARY BEQUEST: You give all or a percentage of the remainder of your estate after the payment of any specific bequests and all estate-related expenses.

CONTINGENT BEQUEST: You give a bequest only in the event of the death of other beneficiaries.



Detail from a drawing by Ashley Bowen depicting Marblehead Harbor, c.1763.

THE MUSEUM'S MISSION

Marblehead Museum is here to preserve, protect, and promote Marblehead's past as a means of enriching the present. The Museum welcomes people of all ages to discover what makes Marblehead extraordinary through innovative learning opportunities. The Museum's three properties and its preeminent collection serve as the catalysts for programming that connects individuals to the past and present, broadening their perspectives and understanding of Marblehead and the wider world.

SECURITIES

Gifts of appreciated securities can be the best way for many people to make a gift to the Marblehead Museum particularly if the securities have grown in value over time. Typically, a sale of appreciated securities results in a tax on the amount that the securities have increased. This means that you are allowed to keep only a portion of the profit. You can donate these appreciated securities to the Museum and avoid the capital gains tax while also earning a charitable deduction on the full value of the securities, even the portion that has increased in value.

RETIREMENT PLAN GIFTS

Retirement plan gifts are an excellent asset to give to a charity. Retirement plan assets are often taxed at your marginal rate. Therefore, it makes more sense to donate retirement plan assets to the Museum. Simply name the Marblehead Museum as the beneficiary of your 401(k), 403(b) or IRA.

CHARITABLE REMAINDER TRUSTS OR OTHER TRUSTS

You can establish a charitable remainder trust in which you provide income to you or to other income-need beneficiaries for life, a set number of years, or a combination of the two. The remaining amount is a gift to the Marblehead Museum. Charitable remainder trusts can offer variable or fixed income and they can help you avoid capital gains taxes as well as reduce income and estate taxes. Additionally, there may be other trusts you can establish in conjunction with your estate attorney which may provide tax advantages to you and/or your heirs and a benefit to the Museum.

LIFE INSURANCE GIFTS

Gifts of life insurance are another good way to make a gift to the Marblehead Museum without incurring a large expense. You can donate either a paid-up policy or a policy where you are still making the premium payments. In both cases you may qualify for a charitable deduction.

GIFTS OF REAL ESTATE

A gift of real estate to the Marblehead Museum is a unique way to support the museum while also achieving a possible avoidance of capital gains tax and receiving a charitable tax deduction. Also, the value of the real estate is taken out of your estate. Real estate can be given to the museum through different means including bequeathing the property, giving the property outright, transferring the property into a trust, or establishing a retained life estate. A retained life estate may be established by giving your residence or vacation property to the museum but reserve the use of the property for your life and/or the life of another beneficiary.

GIFTS OF MARBLEHEAD ARTWORK, ANTIQUES, OR COLLECTIONS

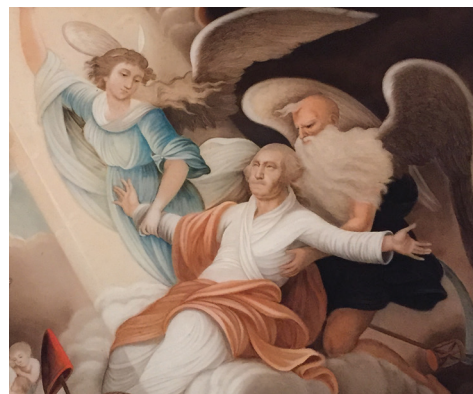
A gift of Marblehead art, antiques, or collections to the Marblehead Museum is a unique way to support and enhance the history of Marblehead. These items can be given to the Museum through various means including bequeathing the art or artifacts in a will, or giving the property outright during your lifetime.



Photograph © Rick Ashley

Top: Reverse painting on glass of George Washington surrounded by mourning figures being uplifted to Heaven. On the right is Father Heaven.

Above: Detail from J.O.J. Frost painting *Fair Winds and Whale's Blowing*.



Photograph by David Bohl

WE WELCOME YOUR INTEREST IN PLANNED GIVING

For more information or to report
your planned gift, please contact:

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ESTATE TAX IMPLICATIONS

The Marblehead Museum is a charitable organization recognized as tax exempt under 501(c)(3) of the Internal Revenue Code. A bequest to the Museum is excluded from your estate.

Disclaimer: The information provided above is of a general character only, as the Marblehead Museum and its personnel are not engaged in rendering legal or tax advisory services. For advice and assistance in specific cases, please consult with your attorney or other professional financial advisor.