



**Gift Planning Notification**

I/We have made a provision in my/our estate plans for a gift to the Smithsonian Institution. I/We am pleased to share the details of my gift below. I/We understand that all information listed on this form will be kept in strict confidence, except to the extent I/we have requested recognition in the Harriet Tubman Legacy Society/Smithsonian Legacy Society.

**Name:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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

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

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Description and Value of Gift-** I/We have made the following planned gift(s) to the Smithsonian:

<u>Planned Giving Instrument</u> <i>Please check applicable options</i>	<u>Value of Gift</u>	<u>Percentage Allocated/ Estimated Value of Gift</u>
<input type="checkbox"/> <b>Will or Living Trust</b>	_____	_____ / _____
<input type="checkbox"/> <b>Retirement Plan</b> <i>Beneficiary designation</i>	_____	_____ / _____
<input type="checkbox"/> <b>Life Insurance Policy</b> <i>Beneficiary designation</i>	_____	<i>or</i> _____ / _____
<input type="checkbox"/> <b>Charitable Lead Trust</b>	_____	_____ / _____
<input type="checkbox"/> <b>Charitable Remainder Trust</b>	_____	_____ / _____
<input type="checkbox"/> <b>Other:</b> _____ <i>Please describe</i>	_____	_____ / _____

**Designation-** It is my/our intent that this gift be used for the benefit of the:

National Museum of African American History and Culture

**Recognition-** *Please see reverse for more information about the Legacy Societies.*

Please list me/us as member(s) of the Legacy Societies as follows:  
 \_\_\_\_\_

- I/We wish for this gift intention to be anonymous.
- Please do not include my/our name(s) in public listings of Legacy Society members.

**This commitment is revocable, and can be modified by me/us at any time.**

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

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

*Please consider providing the Smithsonian with copies of documents that include details of your planned gift.*

Planned gifts large and small are the essential building blocks that ensure the Smithsonian flourishes for generations to come. Planned gifts guarantee that the Smithsonian has the resources it needs to advance its mission for the “increase and diffusion of knowledge” through art, history, science, culture, research and conservation. Please join in sustaining the world’s largest museum and research complex through your planned gift.

Popular planned giving options include bequest commitments, gifts of retirement fund assets or life insurance policies through beneficiary designations, charitable gift annuities, charitable remainder trusts, charitable lead trusts, gifts of real estate and other giving arrangements. Our staff is available to have a confidential gift planning conversation with you and work together with you and your financial advisor to help create your legacy gift to the Smithsonian.

### **Smithsonian Legacy Society**

In recognition of your generosity and commitment, we welcome you to the Smithsonian Legacy Society and a lifelong relationship with the Smithsonian. This group of philanthropists shares a love of learning and a commitment to the future of the institution.

The Legacy Society provides you with opportunities to connect with others interested in learning more about the Smithsonian’s important work and newest endeavors.

As a Legacy Society member, you will be among the first to learn about new exhibitions and programs and be included in special donor receptions and events and unique travel opportunities.

The Smithsonian honors your commitment to preserving our nation’s heritage, advancing scientific discovery and creating significant exhibitions for future generations with membership in the Smithsonian Legacy Society. Thank you!

### **NMAAHC Harriet Tubman Legacy Society**

Once you inform us about your planned gift, you will also become a member of NMAAHC's Harriet Tubman Legacy Society, where you will enjoy a lifelong relationship with the Museum. (If you have already included NMAAHC in your will or future plans, please complete and forward this notification form so we can welcome you.)

Harriet Tubman Legacy Society Member Benefits, (some of which are based on levels of support) are found below.

You will receive Legacy Society pins, invitations to special openings, film screenings, special museum visits, museum-related tours and trips, behind-the-scenes activities, and special donor receptions and events, such as the Smithsonian’s Annual Legacy Society events, and those of the Harriet Tubman Legacy Society, as well.

In addition, you will be connected with others who share your commitment to the future of NMAAHC. You will also be among the first to learn about new exhibitions and programs.

Your gift will be noted in the *Smithsonian Annual Report*, on Legacy Honor Rolls, and through the Harriet Tubman digital donor experience. You may also choose to remain anonymous.