

WHY WE JOINED THE LEGACY HONOR ROLL

Here's one example of how to do it
by *Hilton and Jean Neal*

Want your cake and eat it, too? You can! We did it by setting up a *charitable remainder unitrust* that benefits ourselves and the OAHS&M. Don't let the fancy name confuse you. Here's how we choose to do it.

We used some stock securities (they paid little or no dividends and had low cost basis) to set up the trust. By doing so we avoided paying capital gains taxes on securities we didn't particularly want and, in return, the trust is paying us 6% of the trust's value annually.

We set it up so that when both of us die it is transferred to the Greater Milwaukee Foundation but administered by the Oconomowoc Area Foundation (OAF). We have specified which charitable organizations should receive yearly income from the trust. **A good share of this income will go to the historical society.**

Why this is a *WIN-WIN*:

- * We avoid paying capital gains on some stocks and receive a 6% income payment each year until we both die.
- * We know that there will be funds going to the historical society after our deaths.
- * The trust will help increase the recognition and stature of the OAF.

It isn't difficult to set up trusts or wills. The OAHS&M can help you talk with a local attorney who will provide a no-obligation/no-cost initial consultation about ways to provide a future bequest to the OAHS&M (minimum \$1,000).

Questions? Feel free to call us directly at 262-567-4620 or talk to your attorney or tax accountant. Asking questions doesn't mean making a commitment.

**Your will or estate plan may be the best way to arrange for a thoughtful bequest to
*The Oconomowoc Area Historical Society and Museum***

*A will or estate plan allows you to securely support your family's well-being **and** your favorite charities.*

Generally, you need the help of an attorney. But first, take the time to decide your personal objectives and determine who should receive your property, whether outright or in a trust.

Charitable bequests can be from cash assets, life insurance, stocks, bonds, real estate, retirement plans and other property.

Contact the OAHS&M to get started. Ultimately, your gift may be expressed in words like these:

"I bequest the sum of \$ _____ to the Oconomowoc Area Historical Society and Museum, Inc."

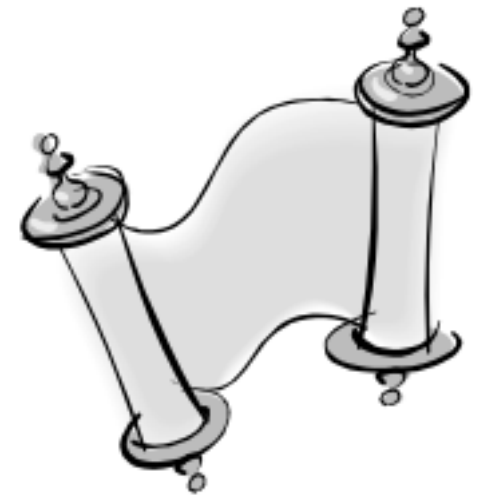
Have Questions?

Call us at (262)569-0740. Please leave a message if the museum is closed and we will return your call.

Your help can preserve Oconomowoc's history!



OUR LEGACY HONOR ROLL



Add your name to our honor roll

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SOMETHING TO *THINK* ABOUT...

Think... of how many times you have said with pride that you were from Oconomowoc.

Think... of clear lakes, a safe and thriving community, great schools, friendly and generous citizens, and our rich history.

Think... of how our ancestors settled and built this area and how we honor their tradition.

Think... of how our unique history is preserved and shared by the Oconomowoc Area Historical Society and Museum (OAHS&M).

Think... of what a loss it would be if the OAHS&M wasn't here to preserve our local stories and artifacts.

Think... of how you can add to our community's legacy by leaving a gift to the Society as part of your will or estate. Gifts of any amount are welcome. Future gifts of \$5,000+ obtain Legacy Honor Roll status.

Think... of how you would like to be remembered.

Think... of preserving Oconomowoc's history by adding your name to the Legacy Honor Roll



Make Some History Yourself

The *Legacy Honor Roll* is a way to designate a future gift in your memory. We understand that loved ones are likely to be named as first recipients of your estate. But many also choose to remember and support worthy causes they believe in and respect.

Share your love for the Oconomowoc area by supporting the OAHS&M with your Legacy Gift.

BENEFITS OF THE LEGACY HONOR ROLL

- Knowing you are supporting the long-term goals of the OAHS&M
- Posting your name on the Legacy Honor Roll in the museum's lobby and on our website
- Publishing your name annually in our fall quarterly newsletter
- Attending a recognition breakfast event every other year for Honor Roll members

A minimum \$5,000 future bequest is requested for Honor Roll status, but gifts of ALL amounts are graciously appreciated. Anonymity is available if you desire privacy.

YOU CAN LEAVE A LIVING LEGACY

PLEASE LET US KNOW OF YOUR INTENTIONS

Sometimes we receive unexpected gifts after someone's passing. These are wonderful surprises, but we wish we could have thanked these folks while they were alive.

- **Telling us creates absolutely no obligation.** Circumstances can change — just let us know. We will understand.
- **Publicity or Privacy?** OAHS&M will never disclose your present or future estate gift without permission.
- **We won't "pester" you for additional contributions just because you let us know of your bequest.** You will continue to receive our traditional mailings and Legacy Honor Roll updates.

HONORARY AND MEMORIAL GIFTS ARE WELCOME

Sometimes you want to recognize someone for being special or as a thank you. A gift in that person's honor to the OAHS&M will accomplish that purpose.

Memorial gifts are always welcome, too. Consider making loving memorial gifts in honor of those who have recently died. You can also ask family to direct memorial gifts, upon your passing, to the Society.

All gifts are tax-deductible and donors will be sent acknowledgements. OAHS&M is a charitable 501(c)3 non-profit organization.