

SOME EXAMPLES OF SPECIAL LIFE INCOME GIFTS

- Charitable Gift Annuities
- The Pooled Income Fund
- Charitable Remainder Trusts
- Charitable Lead Trusts
- Your Residence and Life Income Gifts

Your attorney or financial advisor can provide more information on these.

After signing a new will that names The National Society of The Colonial Dames of America in the Commonwealth of Kentucky as a beneficiary, please inform the Society so that your generosity and thoughtfulness may be appropriately recognized.

USEFUL BEQUEST INFORMATION

LEGAL NAME:

The National Society of The Colonial Dames of America in The Commonwealth of Kentucky, Inc.

ADDRESS:

202 Wilkinson Street, Frankfort, KY 40601

FEDERAL TAX IDENTIFICATION NUMBER:

61-6029757

SAMPLE BEQUEST LANGUAGE

(to be reviewed by your attorney):

"I hereby give, devise, and bequeath to The National Society of The Colonial Dames of America in The Commonwealth of Kentucky, Frankfort, Kentucky, _____-percent of my net residuary estate (or the sum of \$ _____, or the following described property, or the rest and residue of my estate after payment of the foregoing bequests). This is an unrestricted gift and may be used to further the objects and purpose of The Colonial Dames of America in The Commonwealth of Kentucky."

Upon request we are pleased to provide the necessary tax exemption letter to your attorney or financial advisor.



202 Wilkinson Street
Frankfort, KY 40601

THE CATALPA LEGACY SOCIETY

Giving that Grows



Entrusted With History's Future

ABOUT THE CATALPA LEGACY SOCIETY



In the final years of the 18th century, as Liberty Hall was rising from its foundation, John Brown had the inspiration to plant a catalpa tree next to his house. One hundred years later, from seeds gathered from that original tree, another Brown planted another catalpa. One hundred years later in 2000, descendants of the Brown family, using the seeds from the first tree, planted yet another one.

Throughout the centuries, these three magnificent trees and the stately house they frame have required nurturing, pruning and careful preservation. In the same manner, it has been the mission of The National Society of The Colonial Dames of America in The Commonwealth of Kentucky to maintain the fascinating structures, the superb collections and the elegant grounds which comprise Liberty Hall Historic Site, and in so doing to safeguard this remarkable repository of the past for the enlightenment of future generations.

In response to the imperative to protect this vibrant national treasure, a group of donors employing an array of planned giving instruments formed the Catalpa Legacy Society. Inspired by the vision and care of our forebearers, the members of Catalpa Legacy Society are dedicated to the preservation of Liberty Hall Historic Site.



As a member of the Catalpa Legacy Society, you may designate your gift to support one or more of the missions of The National Society of The Colonial Dames of America in The Commonwealth of Kentucky: Museum Properties; Historical Activities; or Patriotic Service. In gratitude for your commitment and generosity you will receive special recognition at each NSCDA-KY annual and semi-annual meeting as well as invitations to special Catalpa Legacy Society events.

TO JOIN THE CATALPA LEGACY SOCIETY

Consider making a bequest in your will. Your attorney can help you design an estate plan that protects your family, preserves your property, and benefits Liberty Hall Historic Site. You can bequeath a percentage of your estate to The National Society of The Colonial



Dames of America in The Commonwealth of Kentucky, a dollar amount, specific property, or the remainder of your estate.

Your bequest may be unrestricted, restricted for the Liberty Hall Historic Site endowment, or restricted for the general endowment.

If you would like to make a significant gift to support the future of NSCDA-KY and/or Liberty Hall Historic Site - but need the income your investments provide - you may want to consider a life income gift to NSCDA-KY.

Your contribution, depending on the life income plan you choose, can provide the following benefits:

- Retained income for your life and, if desired, for the life of your spouse or other beneficiary.
- A current charitable income tax deduction.
- Avoidance of capital gains tax.
- An increased rate of return on highly appreciated, low yielding investments.
- Professional investment management and diversification.
- Exclusion of the gift amount from your taxable estate.
- Satisfaction of making a significant gift to ensure the legacy of NSCDA-KY.