



☐ I/We are interested in joining the Heritage Society to support the efforts to preserve and share our remarkable heritage with future generations. This document states my/our plans for providing a legacy gift to Historic Bethlehem Museums & Sites.

CONFIDENTIAL PLANNED GIVING STATEMENT OF INTENTION

Name: _____ Birth Date: _____

Spouse: _____ Birth Date: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: (H) _____ (W) _____ (C) _____

Email: _____

Spouse Phone: (H) _____ (W) _____ (C) _____

Email: _____

DESCRIPTION OF GIFT

I/We have made provisions for HBMS as follows - please check appropriate statement(s):

- _____ outright bequest payable upon my/our death(s) directly to HBMS
- _____ provision in will of surviving spouse payable to HBMS at death
- _____ a charitable trust with trustee other than HBMS
- _____ beneficiary of a life insurance policy
- _____ beneficiary of a retirement account
- _____ other _____

Estimated value of gift to HBMS: _____

PURPOSE OF GIFT

I/We would like HBMS to use this gift for the following purpose:

- _____ an unrestricted gift to be used by HBMS at its discretion to create the greatest impact in our community by supporting the most compelling needs and opportunities
- _____ an unrestricted gift to the Heritage Fund for HBMS
- _____ an unrestricted gift to the Burnside Founders Fund for Burnside Plantation
- _____ an unrestricted gift to the Historic Bethlehem Endowment Fund for Historic Bethlehem (Goundie House, Visitor Center, Colonial Industrial Quarter)
- _____ an unrestricted gift to the Kemerer Fund for the Kemerer Museum of Decorative Arts
- _____ an unrestricted gift to the Preservation Fund for the Moravian Museum of Bethlehem

I/We would like our gift to be added to the following existing fund(s) or used for the following purpose:

I/We would like to establish a new endowment fund knowing that the threshold for a new fund is \$100,000. I/We will work with HBMS to create a memorandum of understanding to cover the details of this gift. Please provide the exact wording as stated in your will or trust agreement:

RECOGNITION

Historic Bethlehem Museums & Sites appreciates the opportunity to acknowledge your commitment to the community by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.

- _____ I/We permit Historic Bethlehem Museums & Sites to use my/our name(s) in printed lists of the Heritage Society which may appear in the annual report, web site and/or other publications of Historic Bethlehem Museums & Sites.
- _____ I/We prefer to remain anonymous during my/our lifetime(s). You may recognize my/our gift after you receive it.
- _____ I/We prefer to remain anonymous during and after my/our lifetime(s).

For couples, HBMS is happy to list you either separately or as a couple, depending on your preference. If you would like to be recognized as a couple, please complete this form accordingly. If you are making separate planned gifts and prefer to be listed individually in all documents and/or publications, please submit separate forms, one in each name.

Your signature: _____ Date: _____

Spouse's Signature: _____ Date: _____

Thank you for your commitment to HBMS and our community. If you have any questions, please contact:

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