



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:

**LoriAnn Wukitsch**, 610.882.0450 ext. 16, [lwukitsch@historicbethlehem.org](mailto:lwukitsch@historicbethlehem.org)

**Cari Maslow**, 610.882.0450 ext. 11, [emaslow@historicbethlehem.org](mailto:emaslow@historicbethlehem.org)



*Historic Bethlehem Museums & Sites, Inc. is a 501(c)3 organization. The official registration and financial information of Historic Bethlehem Museums & Sites, Inc. may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement. Your contribution is tax deductible to the fullest extent of the law.*