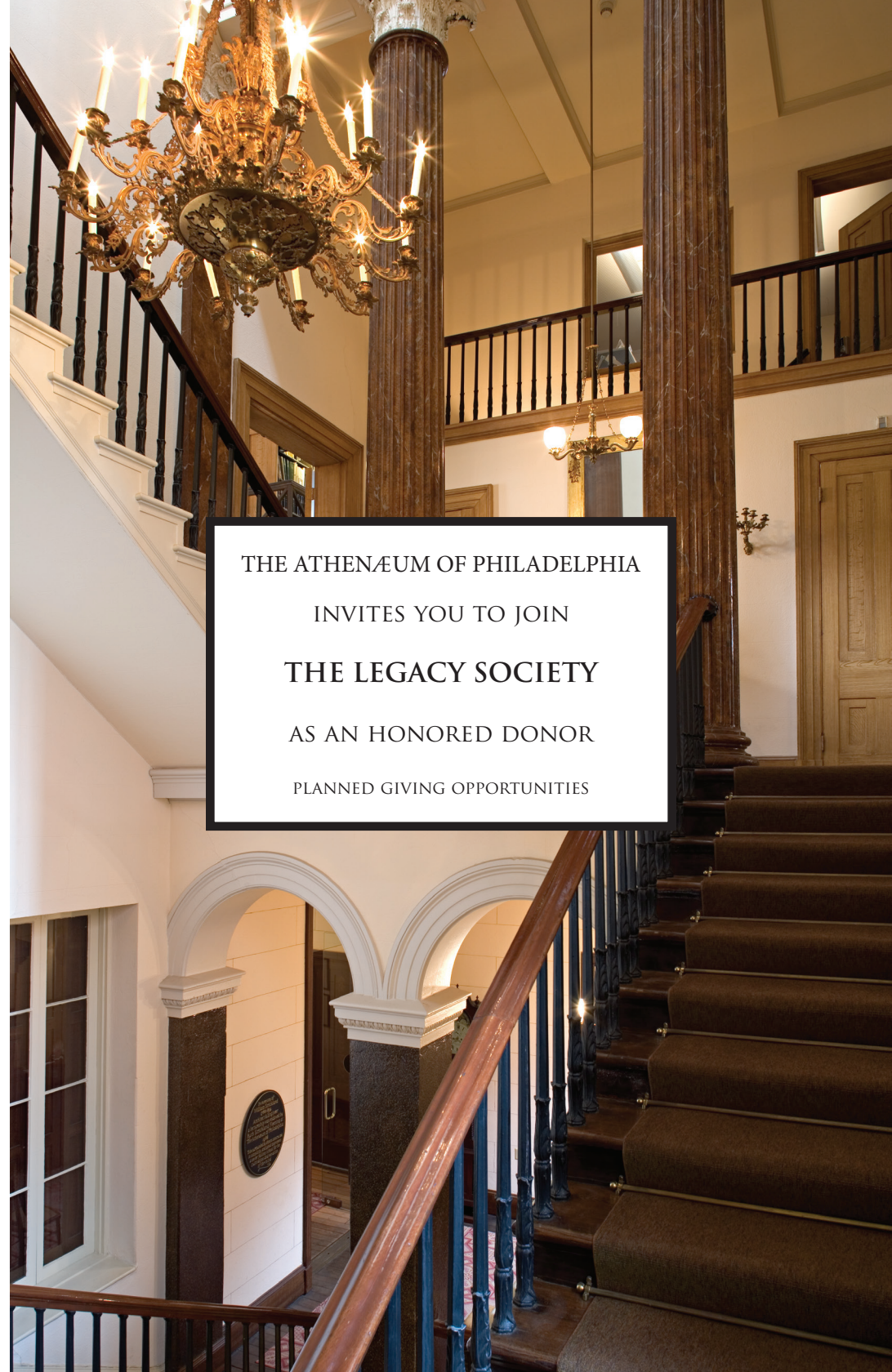




THE ATHENÆUM OF PHILADELPHIA  
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Photo: ©Tom Crane



THE ATHENÆUM OF PHILADELPHIA  
INVITES YOU TO JOIN  
**THE LEGACY SOCIETY**  
AS AN HONORED DONOR  
PLANNED GIVING OPPORTUNITIES

The Athenæum of Philadelphia is grateful to generous donors who help ensure that the unique vision of the original founders reaches increasingly more people and diverse audiences. Individual donations and community support directly affect the breadth and depth of programs and resources that The Athenæum is able to offer.

One of the most unique and mutually beneficial means of an Athenæum member providing support to The Athenæum is by making a planned gift as part of the member's estate plan, thereby joining with the gifts of other donors which will serve to maintain The Athenæum's programming, collections and building. Each member of The Athenæum who expresses a present intention to include a planned gift to The Athenæum as part of the member's estate plan will be enrolled in The Legacy Society.

As an honored member of The Legacy Society, your name will be listed in our annual report and our website.

After you have had an opportunity to review this brief brochure, please let us know how best we may assist you. On behalf of the Board of Trustees and staff, The Athenæum is extremely grateful for your generosity and continued support.

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There are many ways for a member to consider making a gift to The Athenæum as part of the member's estate plan. The Athenæum has been determined by the Internal Revenue Service to be a charitable organization to which all gifts may pass from a donor's estate free of all estate taxes. The following are several examples and, of course, in addition to consulting with The Athenæum's Executive Director, the member should consult with the member's own professional estate planning advisors.

## BEQUESTS

One of the most efficient and popular means of making a gift to The Athenæum as part of your estate plan is to include a provision in your will or companion trust by having your lawyer draft the necessary document. Such gifts may be made either in a specific dollar denomination or as a percentage (or all) of a member's estate. Furthermore, while The Athenæum's preference would be for a donor to make an unrestricted gift to The Athenæum for its general purposes, a member also may wish to consider making a gift to The Athenæum to be added to the existing George Vaux Fund which is a permanent endowment the income of which is regularly applied to support the general operations of The Athenæum. Further information concerning the George Vaux Fund may be obtained from The Athenæum Executive Director.

From time to time The Athenæum may be interested in accepting bequests of books, manuscripts, fine art or similar items. Any member interested in exploring such a possibility should consult with The Athenæum Executive Director.

## GIFTS OF TAX-DEFERRED RETIREMENT PLANS

Many are surprised to learn that the assets held in these plans at the owner's death are among the most heavily taxed assets with the consequent serious erosion of their value when received by a family member or other individual beneficiary. Therefore, IRAs as well as qualified retirement plans (e.g. 401(k) plans) are some of the most efficient assets to leave to The Athenæum by naming The Athenæum as a beneficiary of all or a portion of such an account. Typically, forms for this purpose are easily provided by the plan's administrator.

As with Bequests, a member may designate this sort of gift for the general purposes of The Athenæum or that gift be added to the George Vaux Fund.

## GIFTS OF LIFE INSURANCE POLICIES

Naming The Athenæum as the beneficiary of a new life insurance policy or of an existing policy which is no longer needed is often a desirable way of including The Athenæum as part of a member's estate plan.

Also in certain circumstances it may be appropriate to transfer the ownership of a life insurance policy to The Athenæum during the member's lifetime, thereby possibly receiving lifetime tax benefits as well as assuring the tax-free payment of the ultimate proceeds to The Athenæum in the event of a member's death. Any member who is interested in considering a lifetime transfer of the ownership of an insurance policy should consult with The Athenæum Executive Director.

As with Bequests, a member may designate this sort of gift for the general purposes of The Athenæum or that the gift be added to the George Vaux Fund.

## CHARITABLE TRUST ARRANGEMENTS

It is possible that a member may create a charitable trust arrangement as part of a member's estate plan such as a charitable remainder trust or a charitable lead trust. In either event, The Athenæum may be named as a beneficiary (or as one of the beneficiaries) of such an arrangement and, as mentioned with respect to Bequests, the benefit may be directed for the general purposes of The Athenæum or for addition to the George Vaux Fund.

We will be delighted to discuss these planned giving options with you in greater detail and, again, we encourage you to discuss your wishes with your own professional estate planning advisors.