

The Planned Giving Newsletter of the United States Holocaust Memorial Museum

Generations



MUSEUM LAUNCHES HISTORIC CAMPAIGN

Elie Wiesel at the 20th Anniversary National Tribute Dinner, April 28, 2013, Washington DC

Securing the Museum's Impact, Today and Tomorrow

On the Museum's 20th anniversary, at a gathering that included almost 1,000 Holocaust survivors, World War II veterans, and rescuers, Director Sara J. Bloomfield announced an urgent effort to secure Holocaust memory. Led by honorary chair Elie Wiesel and under the banner **Never Again: What You Do Matters**, the \$540 million campaign to build a stronger endowment and increased annual funds will allow the Museum to make critical investments to keep Holocaust memory alive as a relevant force in the 21st century.

"The task is never over," said Wiesel of the Museum's vital work to inspire new

generations to act on the lessons of the Holocaust. "With great imagination, with passion, and with fervor we must begin again."

The comprehensive campaign will allow the Museum to intensify efforts to rescue the evidence, to sponsor groundbreaking research, to educate and engage a diverse global audience in new ways, and to advance genocide prevention efforts.

The Museum, which anticipates that its collection of evidence will double in the next decade, announced a lead gift of \$15 million from Holocaust survivors David and Fela Shapell and their family to help

build a new \$40 million state-of-the-art Collections and Conservation Center.

Another major objective of the campaign is to double the size of the Museum endowment, primarily through deferred gifts, in order to secure the Museum's global impact in an uncertain future.

"When I think about the world that my grandchildren and their grandchildren will live in, I wonder who is going to tell the story? Who will refute the words of those never-ending revisionists?" asked campaign national co-chair and Legacy of Light Guardian Jay Stein. "There is only one answer to this question: This Museum."

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From the Director of Planned Giving and Endowments



George E. Hellman

As I reflect on the milestone so movingly and memorably commemorated at the Museum's recent 20th anniversary gathering, I am deeply grateful for the dedicated and generous supporters, like you, who have helped create a living memorial that will inform and inspire future generations.

After first providing for loved ones, many thoughtful supporters have also decided to help secure the Museum's future by including gifts to the Museum's endowment in their estate plans.

If your current estate plans were designed largely to minimize taxes that will no longer apply, it may be time to meet with your advisors to reconsider those plans. You may discover you have more discretionary funds available to provide for your loved ones and special charitable interests such as the Museum.

Recently enacted tax law continues and, in some cases, increases the benefits of making gifts today that feature immediate tax savings and additional income for life. One popular plan—the charitable gift annuity—can provide you with extra income and immediate tax benefits. See page 4 for more information or contact us for specifics.

With your commitment, the Museum can make a lasting impact on the world that future generations inherit. Thank you again for an extraordinary first 20 years.

George E. Hellman

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In Memoriam

The United States Holocaust Memorial Museum mourns the passing of the following Legacy of Light Society members:

Irv Apatoff	Dorothy Millstein
Ann Bachmann	Dr. Peter Ofner
Rose King	Kurt Simon
James Langer	

Museum Launches Historic Campaign

Securing the Museum's Impact, Today and Tomorrow

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"We are launching this campaign to ensure the permanence of what we've built and to build something new—a transformative global force against the vast span of ignorance, intolerance, and indifference, the ever-present danger that the unthinkable is always possible," said Bloomfield.

Annual and endowment gifts secured during the quiet phase of the nine-year campaign totaled \$258.7 million and represent the broad spectrum of Museum donors. To learn how you can join this urgent effort to keep Holocaust memory alive—inspiring people worldwide to confront hatred, prevent genocide, and promote human dignity—please visit ushmm.org/campaign.

HIGHLIGHTS FROM THE 20TH ANNIVERSARY NATIONAL TRIBUTE TO HOLOCAUST SURVIVORS AND WORLD WAR II VETERANS

April 28-29, 2013, Washington DC



Top row: Former Council member Sheila Johnson Robbins joined son Peter Robbins and his wife Page Sargisson to unveil their family's engraving on the Donors Wall. Participants of all ages toured Museum special exhibitions.
Photo credits: Michael Priest for US Holocaust Memorial Museum



Middle row: Susan Eisenhower, granddaughter of Gen. Dwight D. Eisenhower, accepted a Museum award on behalf of World War II veterans. Founding Chairman Elie Wiesel and President Bill Clinton spoke at the tribute ceremony honoring Holocaust survivors and veterans.
Photo credits, left and right: Jay Premack for US Holocaust Memorial Museum; center: David Y. Lee for US Holocaust Memorial Museum



Bottom row: Programs included panel discussions with European officials, interactive sessions with Museum educators, and meetings with curators to review personal artifacts.
Photo credits, left and center: Carl Cox for US Holocaust Memorial Museum; right: David Y. Lee for US Holocaust Memorial Museum

Legacy of Light Guardians Honored at 20th Events

Three years ago we introduced a new Museum endowment recognition program—**Legacy of Light Guardians**—as a special way to thank those participating in the campaign’s ambitious effort to *double the Museum’s endowment* to help secure Holocaust memory and safeguard truth for future generations.

At the 20th Anniversary National Tribute Dinner, Museum Director Sara J. Bloomfield recognized the leadership and generosity of approximately 300 Museum supporters who have stepped forward to help meet this challenge. During the campaign’s quiet phase, these Guardians made commitments to the Museum’s endowment totaling \$111 million in new deferred and outright gifts, allowing the Museum to publicly launch the campaign having achieved more than 50 percent of its endowment goal of \$200 million.

“I’m so proud to be a Legacy of Light Guardian,” said Helene Heffler Stolker. “Even though I lost no family members, the Holocaust has become a lifelong passion. My great desire is to instill that passion in others, especially future generations. Those coming after us must not only remember the Holocaust but also be enmeshed in thwarting hatred and bigotry.”

Each of the more than 3,500 guests at the dinner received a copy of the new **Legacy of Light Guardians commemorative publication**—an inspirational keepsake that shares the personal motivations of Guardians starting at the \$100,000 level. Those with commitments starting at \$1 million have a visual testimonial in the commemorative book and are featured on personalized banners. All gifts of \$10,000 and above are included on the *Legacy of Light Guardians Honor Roll*.

If you have made provisions for the Museum’s endowment but have not yet advised the Museum of your intentions, please give us the opportunity to thank you; or if you would like additional information about how to become a Legacy of Light Guardian, please contact Naomi Katz, JD, Associate Director of Planned Giving, at 202.488.2681 or nkatz@ushmm.org.



“After surviving the Terezin concentration camp as a young boy, losing both sets of grandparents and many relatives to the Holocaust, it would be shameful to let the world forget what atrocities occurred. That is why we have included the Museum in our estate plans. It must continue to stand for the truth and to teach young and old the consequences of hate.”

Legacy of Light Guardians
Pam and Mark Rubin

The Planned Giving and Endowments Team

The Museum’s Planned Giving and Endowments Team is a group of professionals who are dedicated to helping secure the Museum’s future. For more information on how we can help you achieve your philanthropic goals, please contact your regional officer listed here.

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What Will a Stronger Endowment Mean for the Museum's Future?

It is no coincidence that assaults on truth are rising just as we are facing the loss of the survivors—our best teachers. As we move further into the 21st century, the challenge to keep the memory of the Holocaust alive in a constantly changing world will become even greater. The most powerful way you can help secure the Museum's global impact in an uncertain future is through an **unrestricted gift** to the Museum's endowment.

Just like your own savings or insurance policies provide you with a degree of security, endowments give the Museum a stable source of funding it can count on to ensure that future generations of young people and leaders understand the

Holocaust and their roles in society. Professionally managed and invested, your legacy gift will provide a crucial funding stream each year, giving the financial flexibility for future Museum leaders to respond to emerging challenges and opportunities. While the primary focus is on building the unrestricted endowment, the campaign also offers a limited number of naming opportunities. *Every gift—of any amount—matters.*

Our staff is prepared to meet with you to explore the many ways you can make the Museum part of your enduring legacy while preserving financial security for yourself and your loved ones.

Creating Your Enduring Legacy to Safeguard Truth

Charitable gifts to the Museum's endowment can take many forms. Two of the most common ways to create an enduring legacy for future generations are bequests and charitable gift annuities.

The Power of a Simple Bequest

With no cost to you today, charitable bequests are provisions in your will or revocable living trust that designate how your assets will be distributed after your lifetime. These gifts are one of the simplest and most flexible ways of giving to the Museum's endowment and may feature tax savings and other financial benefits. If you are considering including the Museum in your will or living trust, you may want to provide your attorney with the language below.

"I [Name] hereby give, devise and bequeath [the sum of \$ (dollar amount)] [(percentage) % of my residuary estate] to the United States Holocaust Memorial Museum (Federal Employer Identification Number 52-1309391), an independent establishment of the United States government, located at 100 Raoul Wallenberg Place, SW, Washington, DC 20024-2126, to be used by it in support of its Permanent Endowment Fund, an unrestricted permanent real endowment fund, or its successor fund, if any."

The Gift that Gives Back

Another popular gift option is a charitable gift annuity. You make a gift today and receive annual payments from the Museum for as long as you and/or a friend or loved one live, while the remainder becomes part of the Museum's permanent unrestricted endowment.

Payment rates vary according to the age of the annuitant(s) at the time the gift is completed. The older you are when you fund your annuity, the higher your payment rate will be (see the chart above). These payments will never change once the gift annuity agreement is completed. In addition to the payments received, gift annuities offer a number of ways to reduce or eliminate gift, income, estate, and capital gains taxes.

Gift Annuity Payment Rates*

Selected Rates for One Person		Selected Rates for Two Persons of the Same Age	
Age	Rate	Ages	Rate
90+	9.0%	90/90	8.2%
85	7.8%	85/85	6.7%
80	6.8%	80/80	5.7%
75	5.8%	75/75	5.0%
70	5.1%	70/70	4.6%

For illustrative purposes only. Please contact us for current benefits and rates for other ages.

*Rates current as of June 2013

To learn more about bequests or gift annuities for the benefit of the Museum's endowment, please return the attached card or contact Sara Eigenberg, JD, Assistant Director of Planned Giving and Endowments, at 202.479.9733 or seigenberg@ushmm.org.

Legacy of Light Society

The Legacy of Light Society recognizes individuals who have made a commitment to secure the Museum's future and its timeless cause by including the Museum in their estate plans. Individuals who direct any type of gift to the Museum's endowment are recognized as **Legacy of Light Guardians**.

[] YES, I'm/we're ready to safeguard truth for future generations. I/We would like to receive more information about the Museum's endowment and how I/we can secure the future impact of the United States Holocaust Memorial Museum with a gift that can also help enhance my/our financial security today.

I/We would also like to receive complimentary materials about:

- Giving Through Your Will
- Giving Through Charitable Lead Trusts
- Giving Through Life Insurance
- Legacy Giving Through My Family Foundation
- Giving Through Gift Annuities

Please send payment and tax benefit information based on the following amount \$ _____ and the birthdate(s) ____/____/____ and ____/____/____ (second individual optional).

[] I/We have already included the Museum in my/our will or other estate plans. Please enroll me/us as a member of the **Legacy of Light Society** and send information about the benefits of being a **Legacy of Light Guardian**.

[] I/We would consider including the Museum in my/our estate plans.

[] I/We are interested in making a contribution to the Museum's Annual Fund.

[] I/We want to learn more about participating in the Museum's comprehensive campaign to keep Holocaust memory alive for a changing world.

Name (please print)

E-mail (optional) Telephone (optional)

Address

City, State Zip

*This information will be kept strictly confidential.
The Museum's Federal Employer Identification Number is 52-1309391*



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Who will be at their side tomorrow?
**THROUGH YOUR LEGACY GIFT
TO THE MUSEUM, YOU WILL.**

WHO WILL TELL THEIR STORIES?

WITH YOUR SUPPORT, WE WILL.



US Holocaust Memorial Museum courtesy of Struga Wainer. Photo by George Kadish.

NATIONAL CAMPAIGN COMMITTEE

As of May 1, 2013

HONORARY CHAIR Elie Wiesel

NATIONAL CO-CHAIRS
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Jay Stein, FL
Howard Unger, NY

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**NEVER
AGAIN**
WHAT YOU DO MATTERS

**THE
CAMPAIGN
FOR THE
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LEARN MORE at ushmm.org/campaign

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Legacy of Light Guardians Honored

**What Will a Strong Endowment
Mean for the Museum's Future?**

Creating Your Enduring Legacy

20th Anniversary Legacy Challenge Achieves Goal

The Museum's first-ever planned giving challenge successfully concluded in advance of the April 30, 2013, deadline with 102 planned gifts to the Museum's endowment qualifying for \$1 million in matching funds.

"We are so thankful to our challenge donors for raising awareness of the need to secure the Museum's future through building a stronger endowment," said Diane Wohl, national chair of the Museum's Legacy of Light Society. "There's no doubt that their generosity has led to an increase in deferred gifts for the benefit of the Museum's endowment, and for that we are extremely grateful."

SAVE THE DATE **Monday, October 21, 2013** **A Day at the Museum** what you do matters

Please join us for this special day of behind-the-scenes programming at the Museum sponsored by the Legacy of Light Society. You will have the opportunity to hear from and interact with curators, historians, and educators.

The cost is \$65 per person, with continental breakfast and lunch included. Space is limited. To receive a detailed invitation please contact Naomi Katz at nkatz@ushmm.org or 202.488.2681, or Celeste Maier at cmaier@ushmm.org or 202.488.2634.



Emily Heldwig, Paper and Photographic Conservator, provides Day at the Museum Program participants with a behind-the-scenes view of the Museum's conservation processes.

The purpose of this publication is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states. ©MMXIII RFSCO, Inc. All Rights Reserved. All photos courtesy of US Holocaust Memorial Museum except as otherwise noted.