



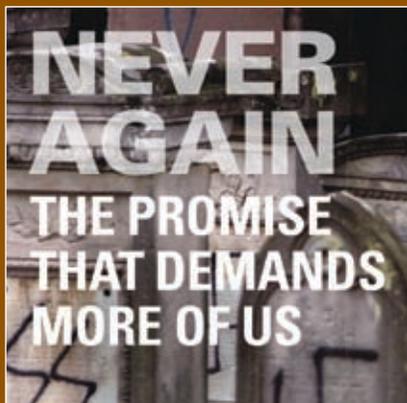
Generations

THE PLANNED GIVING NEWSLETTER OF THE UNITED STATES HOLOCAUST MEMORIAL MUSEUM

What kind of world will our grandchildren inherit? The Holocaust compels us to ask that question and to act on it. That was the promise the survivors made.

You can make the survivors' legacy a powerful part of the future by securing the work of the United States Holocaust Memorial Museum. Because no one will ever care as much as you do.

Make a charitable bequest to the Museum's endowment—a gift that costs nothing today—and help ensure that the promise lives on forever.



Have you already left the Museum a bequest?

Please let us recognize your generosity as a member of the **LEGACY of LIGHT** Society.

Chicago Supporters Inaugurate Legacy of Light Founders Society

Ann and Paul Krouse both grew up in the United States, Ann in Miami Beach and Paul in Chicago. Set up on a blind date, they have been married for 44 years, raising four children and sharing a commitment to the same values, a business, and now retirement—with adequate time set aside for their charitable endeavors.

For 35 years, their company published educational directories, including *Who's Who Among American High School Students*, *Who's Who Among America's Teachers*, *The National Dean's List*, and *Who's Who Among Black Americans*. Through their business, they funded more than \$3 million in college scholarships for qualified students in need of financial aid and provided substantial support for many of the nation's major youth organizations.

Though neither Ann nor Paul lost members of their immediate families in the Holocaust, they believe Holocaust victims are “a part of everyone's family.” The couple first became involved with the Museum after hearing Liv Ullmann, who made her stage debut in a Norwegian production of “The Diary of Anne Frank,” speak at a fundraising event in



PHOTO BY NANCY WATTS

Ann and Paul Krouse

Chicago for the building of the Museum. Deeply moved by Ullmann's commitment to the Museum, Ann and Paul offered to host a Chicago fundraising event in their home and subsequently became actively involved with the Museum. Ann joined a planning committee and eventually she and Paul chaired the Risa K. Lambert Annual Luncheon in Chicago, which now draws more than 3,000 people each year and provides critical funding for the Museum's programs.

To ensure that their family learns the history of the Holocaust, Ann and Paul brought their eldest grandchild, Justin Rosenthal, to the Museum when he turned 11. In 2006, they co-chaired a mission to the Museum for grand-

Continued on page 3

From the Director of Planned Giving



Summer is a time for families to come together to celebrate shared experiences and plans for the future. We all know that families are bound together not only by their common ancestors, but also by their shared values and commitments.

At the United States Holocaust Memorial Museum, we are privileged to work with many families as they share in their desire to fund efforts to educate this and future generations about the need to combat the destructive ideas and actions that can undermine civil society.

One of the most rewarding things we do is help our supporters discover the many ways they can contribute to the Museum and other charitable interests while still preserving a sound financial future for themselves and their loved ones.

There are, in fact, many ways to make gifts to the Museum while still assuring a generous inheritance for your family. This can be accomplished with one or more of the many tools that Congress has provided over the years to encourage voluntary support of the nonprofit organizations that enrich our society.

For example, there are ways to make charitable gifts while temporarily delaying an inheritance until younger heirs are more mature. Or you may wish to provide assistance to loved ones for a period of time before eventually funding a charitable cause.

In this issue of *Generations*, we hope to provide you with some ideas about how you might accomplish your philanthropic goals while also “endowing” the next generation of your family.

I would be happy to share additional information with you and/or your advisors to help ensure that you are able to complete your gifts in a timely and tax-efficient manner. Please call me at 202.488.6591, or e-mail me at ghellman@ushmm.org.

My best wishes for a relaxing and enjoyable summer spent with family and loved ones.

George E. Hellman
George E. Hellman

Leaving a Legacy for Loved Ones— and the Future

There are many plans that allow your assets to “work twice” by using them to make charitable gifts and, at the same time, to provide for yourself, your spouse, and other loved ones. Here are just a few ways our supporters have made gifts to the Museum *and* met their personal planning goals.

Family Endowment Funds

Through the use of a popular planning tool known as a **charitable lead trust**, you can set aside funds that will provide a stream of income to the Museum for a set period of years before they are transferred to your children, grandchildren, or other loved ones. With proper planning, it can be possible to transfer unlimited amounts in this way free of federal estate and gift taxes. In today’s low interest rate environment, this is an especially attractive option.

Family Income Trusts

You can also make a gift that is the reverse of the lead trust described above. In this option, you designate funds to be paid to others for education or other expenses for a period of time before they are transferred as a gift to the Museum. This can result in significant savings for you from reduced capital gain, income, and estate taxes.

Charitable Spousal Support Trusts

If you have considered including charitable gifts as part of your estate plans but would like first to provide support for a surviving spouse, this option may enable you to eliminate estate tax on the assets you transfer. You can leave all or a portion of your assets in a trust that will provide needed support for your spouse for the remainder of his or her life. At death, any remaining funds become a gift for use by the Museum in ways you direct.

Charitable Eldercare Fund

You can also make gifts in support of the Museum while providing a tax-favored income supplement for a parent or other elderly friend or loved one. A **charitable gift annuity** can be a wonderful way to make a gift to the Museum while assuring generous payments to a parent or other loved one for the remainder of his or her lifetime. **Charitable gift annuity rates will be lowered effective July 1, 2008**, so now is a good time to act. For more information about these and other opportunities, please contact George E. Hellman at 202.488.6591 or ghellman@ushmm.org.

Avoiding Double Taxation

Many people do not realize that although other assets left to their families are not subject to income tax, retirement plan assets can be subject to both estate and income tax. This can result in total tax of up to two-thirds of the amount left to heirs. See page 1 to read about Ann and Paul Krouse, who used retirement plan assets to provide a generous gift to the Museum while avoiding the possibility of double taxation.

Legacy of Light Society Luncheon

In February 2008, Helen Marshall chaired the fourth annual Legacy of Light Society luncheon in Boca Raton, Florida. The event drew more than 200 guests and featured remarks by Dr. Robert Satloff, author of *Among the Righteous: Lost Stories from the Holocaust's Long Reach into Arab Lands*.



(From left) Alice and Bob Abrams, Wings of Memory Society Southeast Chairs; Dorothy Bucksbaum, Founder; Dr. Robert Satloff; Arlene Herson, Council member and Legacy of Light Society member; William S. Parsons, Chief of Staff and Legacy of Light Society member; Helen Jonas Rosenzweig; and George Hellman, Director of Planned Giving.



(From left) Luncheon Chair Helen Marshall, Howard Farber, and Luncheon Committee member Rita Segerman and her husband, Bernard.

PHOTOS BY JEFFREY THOLL

The Museum Honors Father Patrick Desbois

The Museum honored French Catholic priest Patrick Desbois, who has devoted his life to confronting anti-semitism and furthering Catholic-Jewish understanding, at the 2008 National Tribute Dinner in April. The dinner was part of the Museum's National Days of Remembrance events.

Father Desbois and his team have been crisscrossing the Ukrainian countryside to identify mass graves and record video testimonies from people who as teenagers witnessed and sometimes assisted in the killing of Jews during the Holocaust. In this truly historic undertaking, many are speaking out for the first time, and their unprecedented testimonies will become part of the Museum's collection. Working closely with Museum scholars, Father Desbois is enriching our understanding of the crimes committed in Ukraine during the Holocaust and helping to preserve the memory of this once vibrant Jewish community.



Father Desbois interviews a witness in her kitchen garden in the Nicolaiev area in July 2007.

GUILLAUME RIBOT

Chicago Supporters

Continued from page 1

parents and their grandchildren and brought two more of their grandchildren. With five more grandchildren waiting to make the trip, Justin has assured his grandparents he will bring them someday himself if Ann and Paul “become too old.”

Asked why they support the Museum, Ann replied, “We *have* to.” She feels fortunate to live in the United States, a country that has erected a Museum to recognize and memorialize the Holocaust—which, she said, sends an important message to deniers. “The Museum is a very important part of our history as a Jewish people,” Paul added, “and it is important for the entire world to be aware of what happened before and during the Holocaust.” This is why Ann and Paul help fund the Museum's educational programs both in Washington, D.C., and around the country.

In addition to the annual support they provide, Ann and Paul decided to make a \$1 million commitment through their estate plans by naming the Museum as a **beneficiary of their retirement plan assets**. With this extraordinary legacy gift, they became inaugural members of the Museum's Legacy of Light Founders Society and have ensured that their lifetime involvement with the Museum will continue in perpetuity.

Museum Exhibitions Around the Country

For a complete listing, please visit www.ushmm.org.

****Deadly Medicine: Creating the Master Race***

Ottawa, Ontario, Canada
The Canadian War Museum
June 12–November 11, 2008

Detroit, Michigan

The Detroit Science Center
December 13, 2008–March 1, 2009

****Fighting the Fires of Hate: America and the Nazi Book Burnings***

Hot Springs, Arkansas
Garland County Public Library
August 2–August 31, 2008

Park City, Utah

Park City Library
September 10–November 4, 2008

****Nazi Persecution of Homosexuals: 1933–1945***

Madison, Wisconsin
University of Wisconsin-Madison Libraries, with GSA for Safe Schools
October 10–December 10, 2008

Schindler

Youngstown, Ohio
Youngstown Historical Center of Industry and Labor
September 10–October 22, 2008

Varian Fry: Assignment Rescue 1940–1941

Rochester, New York
Jewish Community Center of Greater Rochester
October 12–November 9, 2008

**Online exhibition available at www.ushmm.org*

Act Now for Current, Higher Rates

With interest rates once again trending downward, you may be interested in a United States Holocaust Memorial Museum gift annuity. Featuring fixed and reliable payments as high as 11.3% (see chart) and very attractive tax benefits, a gift annuity may be an ideal way for you to support the vital work of the Museum. Gift annuities can be arranged to make payments for you and one other person, such as a spouse, sibling, or parent.



Gift Annuity Payment Rates

Selected Rates for One Person		Selected Rates for Two Persons of the Same Age	
Age	Rate	Ages	Rate
90+	11.3%	90/90	9.3%
85	9.5	85/85	7.9
80	8.0	80/80	6.9
75	7.1	75/75	6.3
70	6.5	70/70	5.9
65	6.0	65/65	5.6

*For illustrative purposes only.
Please write for current benefits and rates for other ages.*

Cover masthead photo composite: The Ratzer family, Poland, 1934. USHMM, gift of Shirley Koperberg Willig; Young visitors view the Museum's Yaffa Eliach Shtetl Collection. PHOTO BY THOMASARLEDGE.COM

UNITED STATES HOLOCAUST MEMORIAL MUSEUM

100 Raoul Wallenberg Place, SW, Washington, DC 20024-2126



LEGACY of LIGHT
SOCIETY



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Director of Planned Giving
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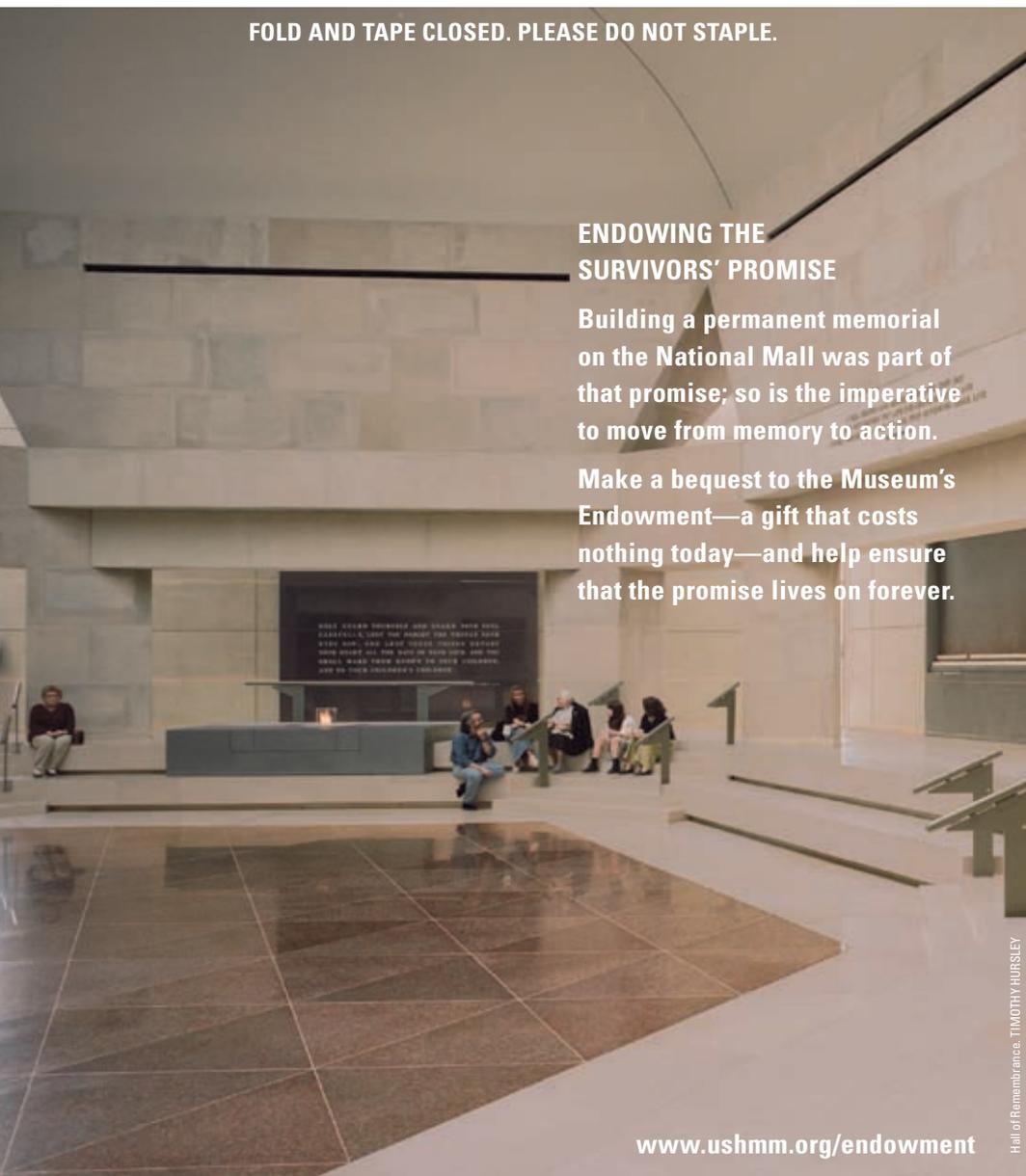


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ENDOWING THE SURVIVORS' PROMISE

Building a permanent memorial on the National Mall was part of that promise; so is the imperative to move from memory to action.

Make a bequest to the Museum's Endowment—a gift that costs nothing today—and help ensure that the promise lives on forever.



www.ushmm.org/endowment

UNITED STATES HOLOCAUST MEMORIAL MUSEUM

MAKE THE SURVIVORS' LEGACY A POWERFUL PART OF THE FUTURE THROUGH YOUR CHARITABLE BEQUEST TO THE MUSEUM'S ENDOWMENT

- I would like to receive more information about the Museum's Endowment Fund and how I can help secure the work of the Museum through retirement plan assets or with a bequest that costs nothing today.
- I would like to receive information about Family Endowment Funds. Please send me your brochure titled *Giving Through Charitable Lead Trusts*.
- I would like to learn about charitable gift annuities. Please send me a personal illustration of how a charitable gift annuity would provide me with payments for life, based on a gift amount of:
 - \$100,000 \$50,000 \$25,000 \$10,000 Other \$ _____

The illustration should be prepared for:

Name _____ Birth date _____

Name of second individual (*optional*) _____

Birth date _____

- I have already included the Museum in my estate plans. Please enroll me in the Legacy of Light Society.
- I am interested in making a gift to the Museum's Annual Fund and would like a Museum representative to contact me.

Name (*please print*) _____

Address _____

City _____ State _____ Zip _____

Telephone (*optional*) _____

E-mail (*optional*) _____

This information will be kept strictly confidential



LEGACY of LIGHT
SOCIETY

Recognizing the generosity of those who
have made a planned gift to the Museum

For more information, please call 202.488.6591 or visit: www.ushmm.org/endowment

UNITED STATES HOLOCAUST MEMORIAL MUSEUM

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