UNITED STATES HOLOCAUST MEMORIAL MUSEUM

A will is a vital document that protects your family and those you care about. Bequests are provisions in your will or revocable living trust that designate how your assets will be distributed after your lifetime. Charitable bequests can eliminate or reduce federal estate taxes and they are one of the simplest and most flexible ways of giving. You have the option of naming the Museum as the beneficiary of a fixed dollar amount or a percentage of your residuary estate. You can also determine whether you would like your bequest to support the Museum's Permanent Endowment Fund or its Annual Fund.

Types of Bequests:

• Cash Bequest

You may designate a specific sum of money be given to the Museum in your will or trust.

• Residuary Bequest

In your will or trust, you may designate where the remainder of your estate will go after all other bequests, debts and taxes have been paid. You can designate the Museum as beneficiary of all or a portion of your residual estate.

• Specific Bequest

You may designate that a specific item, such as personal property (real estate, artwork, jewelry, a collection of stamps or coins, etc.) or a certain stock be given to the Museum.

• Contingent Bequest

This is a bequest made on condition that a certain event must occur before distribution to the beneficiary. For example, you may designate the Museum as a beneficiary if your spouse or other heir or legatee predeceases you.

If you would like to include a bequest for the Museum in your will, the following sample legacy language may be helpful:

1. Bequest Clause for the Benefit of USHMM's Permanent Endowment Fund*

I** hereby give, devise and bequeath [the sum of $_____] [_____% of my residuary estate]*** to the United States Holocaust Memorial Museum, an independent establishment of the United States government, located at 100 Raoul Wallenberg Place, SW, Washington DC 20024- 2126 (the "USHMM"), 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 "Endowment Fund"), earned income from which is permanently restricted to the Endowment Fund. Distributions from the Endowment Fund shall be made based on USHMM's adopted spending plan for the Endowment Fund as is then in effect (and as may be modified from time-to-time), and such distributions are to be made in support of the Education and Remembrance Fund, the annual fund of USHMM (or its successor fund, if any), in support of USHMM's general charitable purposes. The bequest proceeds distributed to USHMM hereunder, including income thereon (including gains and losses (realized and unrealized)), shall be invested in accordance with USHMM's investment and management policies relating to Endowment Fund assets as are then in effect (and as may be modified from time-to-time), and may be commingled with other USHMM funds for investment purposes. USHMM's Federal Employer Identification Number is 52-1309391.

2. Bequest Clause for an Outright Gift to USHMM

I** hereby give, devise and bequeath [the sum of $_____] [_____% of my residuary estate]*** to the United States Holocaust Memorial Museum, an independent establishment of the United States government, located at 100 Raoul Wallenberg Place, SW, Washington DC 20024- 2126 (the "USHMM"), to be used by it in support of its Education and Remembrance Fund, the annual fund of USHMM (or its successor fund, if any). USHMM's Federal Employer Identification Number is 52-1309391.

*A bequest to establish a restricted endowment fund is another alternative. If you are considering such a bequest, it should be discussed with USHMM as early as possible in your estate planning process to ensure that the restrictions you are contemplating are feasible. Please contact George E. Hellman, J.D., Director of Planned Giving, at 202.488.6591 or by e-mail at Ghellman@ushmm.org.

**Insert name and address, if appropriate (for example, "I, [INSERT NAME], residing at [INSERT ADDRESS], hereby…."). This information most likely already will be included at the beginning of the Will, and will not need to be repeated here.

***Bracketed language represents alternate types of bequests—a specific dollar amount, or a percentage of an individual's residuary estate.

The information provided above is not intended to serve as tax or legal advice. Please consult your attorney and/or financial advisor before making a gift.