

The Planned Giving Newsletter of the United States Holocaust Memorial Museum

Generations



“The Museum and the study of the Holocaust have been such an important part of my life. We wanted to recognize that and ensure the Museum can continue its work in the future.”

—Dr. Peter Hayes

Legacy of Light Guardians Dr. Peter Hayes and Voltaire Miran, Chicago, Illinois

A Professional and Personal Commitment

Historian Peter Hayes has dedicated his entire career to the study of the Holocaust. He taught history, German, and the Holocaust for nearly four decades at Northwestern University before retiring in 2016. His commitment to the discipline is not only a professional one, however. When it came time to make a decision about the personal legacy he and his husband, Voltaire Miran, want to leave, they chose to include a bequest to the Museum in their will.

“The Museum and the study of the Holocaust have been such an important part of my life. We wanted to recognize that and ensure the Museum can continue its work in the future,” said Hayes.

A self-described “child of the ’60s,” Hayes credits the Civil Rights Movement and the release during his teenage years of

the films *Exodus* and the *Diary of Anne Frank* for sparking his interest in the Holocaust. Professors in his graduate programs at Oxford and Yale solidified his chosen area of study—as did the consistently high demand for his classes on the Holocaust at Northwestern.

Hayes’s connection to the Museum dates back to the late 1990s, when he received the J.B. and Maurice C. Shapiro Fellowship and was subsequently invited to join the Academic Committee, which oversees the work of the Jack, Joseph, and Morton Mandel Center for Advanced Holocaust Studies. Now the chair of the Academic Committee, Hayes has witnessed what he called “stupendous growth” in the Museum’s academic research programs over the past two decades. “In the late ’90s when I was a visiting research fellow, there were two or three of us. Now there are 10 to 12 scholars at any one time,” said Hayes.

While writing his latest book, *Why? Explaining the Holocaust*, Hayes reread the field’s major publications and was impressed at how many of them had originated in research done at the Museum. “The impact of the Museum on the development of Holocaust research is second to no institution in the world,” he said.

Through this gift—one that he was delighted to learn qualifies for the **25th Anniversary Mendelson Legacy Challenge** (see page 2)—Hayes wants to enable the Museum to inspire the next generation of historians and scholars to leave their mark on the field of Holocaust studies. “The angle of vision that every new generation brings is different,” he said. “There will always be new methods of telling the story, but the Holocaust will remain pertinent as long as we continue to tell the story well and correctly.”

From the Director of Planned Giving and Endowments

Like many of us, you may be wondering what is going to happen with tax reform. There are proposals on the table that could reduce tax rates and also limit charitable and other deductions in the future. While it is anyone's guess whether legislation will actually be enacted in 2017, you may want to consider the best ways to make gifts to the Museum this year, taking maximum advantage of the current tax code and economic climate.

Stock market values recently have reached record highs, and many investors have greatly benefitted from this run-up. Despite increased value, many stocks pay little or no dividends. Using securities such as these to fund charitable gifts may be an especially tax-wise choice this year-end. Giving in this way can:

1. Conserve your cash by using appreciated stocks to make your gifts.
2. Allow you to deduct the full fair market value of the assets, not just their original cost.
3. Help you bypass capital gains tax whether or not you itemize deductions.

On another note, the end of the year is also a time when many of us reflect on our long-range estate plans. Tax laws are just one of the factors that may affect your plans. Other changes in your life—such as retiring, moving to another state, a change in marital status, the birth of a grandchild, or the loss of a loved one—are just a few life events that may prompt you to revisit your plans.

We would be happy to talk with you about your giving plans for year-end and beyond. As always, enjoy this issue of *Generations*.

George E. Hellman

George E. Hellman, JD
202.488.6591 * ghellman@ushmm.org



George E. Hellman

HELP US Thank You

IS THE MUSEUM already a part of your legacy? If so, we want to know—and here's why:

- Your gift can be leveraged through the 25th Anniversary Mendelson Legacy Challenge (see below).
- You can join our **Legacy of Light Society**, a special group of donors who also care about the Museum's future.
- There's no obligation—you can always amend your estate plans if your circumstances or priorities change.
- You'll get to know us better, and we will better understand how you wish your gifts to be used.
- We would like to have the opportunity to thank you for your wonderful generosity!

Please call 202.488.6591 or return the attached reply form.

BE PART OF THE MUSEUM'S FUTURE

The 25th Anniversary Mendelson Legacy Challenge



In honor of the Museum's 25th anniversary in April 2018, Jen and Dan Mendelson have stepped forward to challenge each of us to make securing the Museum's future—and safeguarding truth for generations to come—our personal legacy.

Through the establishment of their bequest of up to \$1 million, the Mendelsons will match 10 percent of each new outright or planned gift to the Museum's endowment, with a maximum of \$25,000 per gift.

DEADLINE APPROACHING: All qualifying gifts established or newly identified before February 15, 2018, are eligible.

TO LEARN MORE CONTACT
George E. Hellman, JD
Associate Deputy Chief Development Officer
Planned Giving and Endowments
202.488.6591 or ghellman@ushmm.org

In Memoriam

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

Bee Apatoff	Martin Gerotwol	Louis R. Sipos
Selma Cornet	Paul Loewner	Florence Toledano
	Judith K. Sellinger	

Take the challenge today. With your deferred or outright gift to the Museum's endowment, let us recognize your enduring commitment in the 25th Anniversary edition of the *Legacy of Light Guardians Commemorative Publication*.



NEVER AGAIN
WHAT YOU DO MATTERS

THE CAMPAIGN

Your Retirement Assets Can Serve Multiple Goals

Goal 1. You may find that you could make the largest gift of your life from “what’s left” in your retirement plan account, such as a 401(k) or IRA. Because such funds can be subject to both income and estate taxes when left to non-spousal heirs, a gift from funds remaining in these plans can be a tax-wise way to make a legacy gift to the Museum’s endowment while leaving other, less heavily taxed assets to heirs.

Goal 2. If you are age 70½ or older, you may make gifts directly from IRAs to the Museum without having to pay additional income taxes that would otherwise be due. You may make charitable IRA gifts of any amount (up to \$100,000 per person per year or \$200,000 for a couple with separate IRAs). Such gifts can count towards all or part of your annual Required Minimum Distribution (RMD).

If you are considering a gift through your IRA or other retirement plan, check with your advisors for the best course of action for you and please let us know so we can be sure your wishes are fulfilled.

Are Your Plans Up to Date?

If you are like most of our readers, you will find that events in your life may require changes in your estate plans from time to time. Our lives are not static, and wills and other plans should be periodically revisited and adapted to reflect the changes in circumstances.

Take the following True/False quiz to test how your existing plans match your current needs.

1. I have an up-to-date will and/or other legal arrangements for distributing my assets. T F
2. I have not retired from full-time employment since last reviewing my plans. T F
3. My marital status has not changed since my last review. T F
4. My family, friends, and charitable interests are remembered in my plans the way I would like them to be. T F
5. The makeup of my family has not changed since I last reviewed my estate plans. T F
6. The person I have named to oversee the future distribution of my property is still able and willing to serve. T F
7. My insurance and/or retirement plan beneficiary designations are up to date. T F
8. I have arranged for a power of attorney or otherwise provided for the management of my affairs should I be unable to do so. T F
9. I have not moved to another state since making my estate plans. T F
10. The value of my assets has not changed significantly since my last review. T F

This quiz is easy to score: If you answered **False** to any statement, you may wish to discuss that issue with your professional advisor.

By regularly reviewing and updating your will and related plans, you can ensure they reflect changes in your finances, family circumstances, tax laws, and other factors. Careful planning allows your values to live on well into the future through the people and organizations, such as the Museum, that mean the most to you.

If we can help you or your advisors with the charitable aspects of your plans, please contact a member of our Planned Giving and Endowments Team (see the next panel for details).

PLACE
STAMP
HERE

BUSINESS REPLY MAIL

United States Holocaust Memorial Museum
Planned Giving and Endowments
100 Raoul Wallenberg Place, SW
Washington, DC 20024-2126



Meet Our Planned Giving and Endowments Team

The Museum's Planned Giving and Endowments team is a group of dedicated professionals who have a passion for the Museum's vital work, as well as for helping you make securing its future a part of your personal legacy. For more information on ways to accomplish this, please contact the appropriate staff member.



George E. Hellman, JD
Associate Deputy Chief
Development Officer, Planned
Giving and Endowments
ghellman@ushmm.org
202.488.6591
Midwest and Northeast Regions



Naomi Katz, JD
Associate Director of Planned
Giving and Endowments
nkatz@ushmm.org
202.520.9392
Mid-Atlantic, Midwest,
Northeast, and Southeast Regions



Sara Eigenberg, JD
Deputy Director of Planned
Giving and Endowments
seigenberg@ushmm.org
202.479.9733
Western Region, Southwest, and
New England Areas



Celeste Z. Maier
Director of Stewardship,
Legacy of Light Society
cmaier@ushmm.org
202.488.2634



Sam Hinckley
Development
Coordinator,
Planned Giving
and Endowments
shinckley@ushmm.org
202.314.1748

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. © Copyright 2017 by Sharpe Group. All Rights Reserved. All photos courtesy of US Holocaust Memorial Museum except as otherwise noted. Portrait of George E. Hellman courtesy of Carl Cox.

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/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 like to receive complimentary materials about:

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

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

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 to support the comprehensive campaign with a gift that will help secure the future impact of the Museum and can also help enhance my/our financial security today.

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

I am/We are interested in the 25th Anniversary Mendelson Legacy Challenge.

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

Name (please print)

E-mail (optional)

Telephone (optional)

Address

City, State

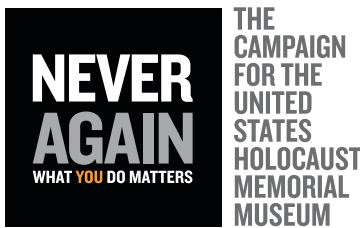
Zip

This information will be kept strictly confidential.

The Museum's Federal Employer Identification Number is 52-1309391

UNITED STATES
HOLOCAUST
MEMORIAL
MUSEUM

Planned Giving and Endowments
100 Raoul Wallenberg Place, SW
Washington, DC 20024-2126
202.488.6591



You can help keep Holocaust memory alive.
VISIT ushmm.org/campaign to learn more.

25TH ANNIVERSARY COMMEMORATION APRIL 8-10, 2018 | WASHINGTON, DC

Join us in honoring Holocaust survivors for their resilience and courage to never stop asking why and challenging us to do the same.

DAYS OF REMEMBRANCE CEREMONY IN THE US CAPITOL

GLOBAL ISSUES FORUM: A CONVERSATION ABOUT HUMAN NATURE

Engaging with thought leaders about difficult questions Holocaust history raises about our susceptibility to hatred and extremism.

NATIONAL TRIBUTE DINNER

Honoring all Holocaust survivors with the 2018 Elie Wiesel Award

LEGACY OF LIGHT SOCIETY DONOR APPRECIATION BRUNCH

EXCLUSIVE PREVIEW OF **AMERICANS AND THE NAZI THREAT**

The latest example of the Museum's 25-year legacy of groundbreaking exhibitions that examine how and why the Holocaust happened.

Opens to the public in May.

These events are open to donors who have included the Museum in their estate plans and joined the Legacy of Light Society, and to donors who have made a minimum annual gift of \$2,500 to the Museum. For questions, contact Celeste Z. Maier at 202.488.2634 or cmaier@ushmm.org.

UNITED STATES
HOLOCAUST
MEMORIAL
MUSEUM

2018
25