

The Planned Giving Newsletter of the United States Holocaust Memorial Museum

Generations

Honoring a Grandmother's Legacy

I didn't have grandparents when I was growing up like other kids did. I grew up alone with my mother, who occasionally talked about her youth in Czechoslovakia and her life in England during the war. In March 1939, she and her sister had fled the town where their family had lived for generations and where she had established an interior architecture practice. They obtained jobs in England as domestics in a manor house. Their father had died four years earlier; they never saw their mother, Helene, again.

Unlike my mother and her siblings, my grandmother, Helene, was unable to emigrate before the war. In 1942, she was deported to Theresienstadt, where she yearned to keep a record of what was happening to her. She wrote on whatever materials she could find—family photos she brought with her, as well as postcards and letters she received in the ghetto. It was through this unusual sort of diary that I got to know her, years after she died in November 1943 from an infection following an appendectomy.

It was in honor of my grandmother, and her urgent need to document what was happening to her, that I decided, with my cousins' consent, to donate her diary, photos, letters, and other family documents to the Museum. It's important to learn about the Holocaust, and we remember best what is personal. I hope that by reading my grandmother's very direct reporting of her experiences, people will learn and remember this history.

My husband, Don, shares my belief that personal stories help people today never forget what happened in the past. He and I recently decided to support the Museum's ability to continue telling the stories of my grandmother and millions of others who died during the Holocaust. We decided to leave a bequest to the Museum in our wills.

Don is so inspired by the training the Museum does with law enforcement to help them learn how the German police became complicit in the Holocaust. And I think it's important for the Museum to be the voice of victims today, as it has been for people fleeing Syria and Burma. These are just two Museum programs that we find so relevant today. We hope our gifts will enable the Museum to teach this important history to even more people every year.



Legacy of Light Guardians Donald B. Melman and Elizabeth H. Margosches, Alexandria, Virginia

“It's important to learn about the Holocaust, and we remember best what is personal.”

—Elizabeth Margosches

A Note from the New Legacy of Light Chair: “What Matters to You?”

Dear Friends of the Museum:

I am honored to introduce myself as the new National Chair of the Legacy of Light Society, which recognizes those who have included the Museum in their estate plans. Our members come from all walks of life, every region of the country, and many religious denominations. Some are wealthy, and others, like me, are of modest means. However, we share a commitment to the mission and future of the Museum, and believe that leaving a legacy gift will sustain the Museum’s work into the next century.

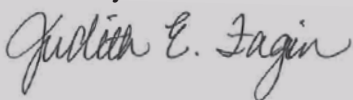
As Chair, I want to encourage others to join us by asking, “What matters to you?” What matters to you as a survivor, or scholar, or hate-crime victim, or child of a survivor, or Jewish community leader, or religious leader, or first- or fourth-generation American? We all have stories that shape what matters to us, and those stories link us to the Museum. I want to help strengthen those connections.

I am not only the Chair of the Legacy of Light Society, but also a proud member with a story of my own. My mother, Dr. Helen N. Fagin, is a Holocaust survivor from Poland. Like many survivors, she didn’t like to talk about her experiences, and I knew not to ask. That changed during an event at our home when Elie Wiesel convinced my mother that those who survived the Holocaust were obligated to teach others about it. It was then that she committed herself to do just that, and later Elie asked her to be an advisor to the Council creating the United States Holocaust Memorial Museum, helping to design its educational programs.

I look forward to hearing your stories and to helping you find your personal connection to the Museum’s work. That work, however, needs our financial commitment. The Planned Giving and Endowments team can explain the options for making a meaningful gift to the Museum in a manner that preserves or enhances your financial well-being. And if you already have the Museum in your estate plans, let us know so we can acknowledge your gift and welcome you as a member of the Legacy of Light Society!

Thank you for your commitment to secure the Museum’s future—something that matters to all of us.

Sincerely,



Judith E. Fagin



Judith E. Fagin

Quick Tax Law Tips

Tip 1. The new tax law provided estate and gift tax relief for many Americans. In fact, federal gift and estate taxes now apply only to estates greater than \$11.18 million (\$22.36 million for married couples).

When reviewing your estate and financial plans, you may want to think about how recent tax changes could influence your estate plans. If it’s been a long time since your plans were reviewed, they may be based on laws that no longer apply. You may find it is now possible to include charitable interests in your plans and your heirs will receive as much or more than under prior law.

Tip 2. The special tax advantages of current and future gifts from retirement plans, as well as giving certain other types of assets, remain the same under the new law.

For example: If you are age 70½ or older, you can make tax-free gifts directly to qualified charitable organizations, such as the United States Holocaust Memorial Museum, from your Individual Retirement Account (IRA). This is a tax-effective way to make charitable gifts—in any amount totaling up to \$100,000 per person per year, whether or not you deduct your gifts on your tax return. You can even count these gifts toward your Required Minimum Distribution. See Page 3 for more on devoting all or a portion of amounts remaining in retirement plans to charitable purposes.

In Memoriam

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

Frank Adler	Dr. D. Walter Cohen	Marsha Kreuzman
Robert D. Appelbaum	Isaac Dickmann	Helen Rauch
Bruce Bachmann	Sol Freedman	Susan Rosenthal
Randolph L. Braham	Dr. Carole Ruth Harris	Alan Rutkoff
Helen Clawson	Gordon Harwitz	

Q & A About Giving Through Your Will

Q: How do people make charitable gifts through their will?

A: Some supporters name the United States Holocaust Memorial Museum and other charitable organizations as final, residuary beneficiaries to receive whatever remains in their estate after providing for their loved ones. Others designate a percentage of the assets in their estate for charitable use or decide to leave a certain dollar amount or specified assets.

Q: Aren't such gifts made mainly by people who have no close relatives or whose estates are so large that there is plenty left over?

A: Not always. Even modest estates today are larger than the average estates of past generations, and more people find it possible to make a “gift of a lifetime” through their estate after they know the needs of friends and relatives have been met. This is especially true now that fewer people will owe estate taxes on amounts left to heirs and find more will be available from which to make charitable gifts.

Q: Can directing retirement plan assets to charity as part of my estate plan spare my heirs additional costs and taxes?

A: Yes. Amounts remaining in IRAs and other qualified retirement fund accounts can be subject to double taxation at death. Such assets may not only be included in a taxable estate, but non-spousal heirs generally have to pay income tax on what remains after estate taxes have been paid. For this reason, supporters of the Museum may choose to use funds from these accounts to satisfy their charitable wishes. Making charitable gifts from remaining retirement funds and leaving

other assets to family members or other loved ones can, therefore, help minimize estate and income taxes.

The administrator of your plan can assist you in designating a charitable beneficiary.

Q: Are there special steps needed to designate charitable gifts?

A: Yes. To help ensure that the charitable recipient you intend to benefit receives your gift, make sure to use the organization's complete legal name and suggested language. For example, if you are leaving the Museum a bequest in your will, we recommend that you share the following language—which designates bequests for the Museum's Endowment—with your attorney.

“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.”

For suggested language for other types of planned gifts, please contact George E. Hellman, JD, Associate Deputy Chief Development Officer, Planned Giving and Endowments, at 202.248.6591 or ghellman@ushmm.org.

Do You Have a Question About Gift Planning?

If so, please let us know by returning the attached card. You may see your question and our answer featured in an upcoming newsletter!

PLACE
STAMP
HERE

BUSINESS REPLY MAIL

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



Legacy of Light Society Welcomes New Leadership



Judith E. Fagin

The United States Holocaust Memorial Museum is pleased to announce the appointment of Judith E. Fagin as National Legacy of Light Society Chair. Judith succeeds Dana Perlman, who served as chair from 2016-2018 during the successful 25th Anniversary Mendelson Legacy Challenge. That Legacy Challenge raised 139 new or increased endowment-directed planned gifts, outright gifts, and pledges, totaling \$37.4 million, all of which resulted in successfully achieving the million dollar Legacy Challenge match goal.



Dana Perlman

Judith is the child of Holocaust survivor, Dr. Helen N. Fagin, who is a nationally recognized figure in the field of Holocaust education. After careers in public administration, urban design, and health care management in New York, Michigan, and Boston, Judith moved to Sarasota in 2016, to assist her parents. Judith has followed in her mother's footsteps by establishing a legacy gift in her mother's honor that will enable the Museum to continue its work educating diverse audiences from all walks of life, in big cities and small towns, about the dangers of unchecked hatred and the timeless lessons of the Holocaust.

Judith will serve as the national spokesperson for the Museum on behalf of the Legacy of Light Society, which recognizes those who have made deferred legacy gifts to the Museum. "I would like to extend my thanks to Dana for his passion and dedication during his tenure as National Chair of the Legacy of Light Society," said Judith. "I am grateful for the opportunity to inspire others to consider ways they can support the Museum in their estate plans."

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**.

I'm/We're ready to safeguard truth for future generations.

Please send me/us additional information about updating my/our estate plans to include a gift in my/our will to the Museum.

Please send information about ways to make gifts to the Museum that provide income, immediate tax savings, and other special benefits. I/We understand payment rates and tax benefits are based on age(s) of payment recipients. My/Our date(s) of birth are ____/____/____ and ____/____/____ (second individual optional).

Please send more information about the Museum endowment and how to support the comprehensive campaign with a gift that will help secure the future impact of the Museum.

Please send information on making a contribution to the Museum's Annual Fund.

Many people like to include gifts to charity in their will to support causes that are important in their life. Have you considered making such a gift to the United States Holocaust Memorial Museum to benefit future generations?

I/We have already included the U.S. Holocaust Memorial Museum in my/our will or other estate plans.

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

Name (please print)

Address

City, State

Zip

E-mail (optional)

Telephone (optional)

Questions? If you would like to ask a question to be answered by the Museum's Planned Giving and Endowments staff, please use the space below, email ghellman@ushmm.org or call 202.488.6591.

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

FOLD AND TAPE CLOSED. DO NOT STAPLE



Travel with the Museum

JOIN MUSEUM HISTORIANS, EXPERTS, AND SUPPORTERS on one-of-a-kind trips to countries of significance to Holocaust history and contemporary genocide. Participants enjoy behind-the-scenes access to historic sites, museums, and cultural institutions and meet with high-level partners and government officials. For more information, contact nficara@ushmm.org.

MOROCCO February 16–24, 2019

Optional extension to desert: February 24–27

POLAND April 5–11, 2019

Optional extension to Berlin: April 11–14

CHAIRS: Jamie Diamond Schwartz and David Schwartz

RWANDA May 31–June 7, 2019

CAMBODIA November 9–17, 2019

All photos: *US Holocaust Memorial Museum* unless otherwise indicated.
A detail of a stained-glass window, Temple Beth-El, Casablanca.
Empty Chairs Memorial at Ghetto Heroes Square in Krakow, Poland, *Chuck Myers via ZUMA Wire*.
Intore dancers at the Virunga Lodge in Rwanda, *Laura E. Pobl for the US Holocaust Memorial Museum*.
Angkor Wat Temple complex, Siem Reap, Cambodia.

Help us keep Holocaust memory alive for a changing world. Learn more at ushmm.org/campaign.

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.



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UNITED STATES
**HOLOCAUST
MEMORIAL
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