



The National Czech & Slovak Museum & Library Legacy Society

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Mission: We inspire people from every background to connect to Czech and Slovak history and culture.

Vision: We are a museum that celebrates life. Czech life. Slovak life. American life. We are a museum that encourages self-discovery, a museum that asks what it means to be free. Through extraordinary exhibitions and experiences, we tell stories of freedom and identity, family and community, human rights and dignity. Our stories connect yesterday with today and tomorrow.

You are inspirational.

Legacy Society members have made provisions to support the NCSML through planned gifts such as wills, trusts, or estate plans. The NCSML's Legacy Society members inspire people across the country to connect to Czech and Slovak history and culture, to make sure the stories of these people are not lost in time. Legacy Society members ensure that the NCSML's work will be relevant and vibrant today as well as tomorrow.

What legacy will you leave?

Planned gifts can provide financial security for your family now and support the NCSML's mission in the future. Most planned gifts offer a form of estate charitable tax deduction, and can be given as an unrestricted or designated gift. Our development officers can work with you and your financial advisors to identify the best plan for you.

The most familiar planned giving options include:

- **Wills and Bequests:** These are the easiest and most common legacy gifts, and usually involve naming the NCSML as a beneficiary in your will or trust. Types of bequests may include a specific amount or a specific asset, a percentage of your estate or trust, or the balance of your estate or trust after gifts to other beneficiaries have been made.
- **Charitable Remainder Trust:** A legal trust is created providing you and/or your loved one(s) a regular fixed payment for a specified period of time or for life. Income, capital gains, and/or estates taxes can be reduced or eliminated. At the conclusion of the period of time, or upon your death, the remaining assets within the trust transfer to the NCSML.
- **Charitable Gift Annuity:** This is similar to Charitable Trusts, but simpler. With a charitable gift annuity, you transfer cash or marketable securities to the NCSML and, in return, the NCSML issues an annuity contract to pay a fixed payment for life to you and/or your beneficiary. Upon your or your beneficiary's death, the fund transfers to benefit the NCSML.
- **Gifts of Life Insurance:** There are a number of ways to utilize life insurance as a planned giving tool. The most common include, but are not limited to, donating a policy's accumulated cash value, listing the NCSML as a beneficiary, or assigning ownership of a policy listing the NCSML as that policy's beneficiary.

- **Gifts of Appreciated Stock:** Making a gift of appreciated securities can provide you with significant tax benefits. One benefit is that you do not pay the capital gains tax on the appreciation that otherwise would have been required had you first sold the stock and then made a cash gift.

Sample language for your estate plans

Making clear your intentions for the distribution of assets (cash, stock or other property) is an important step of your estate planning. Usually, simple language best creates clarity for all involved in these philanthropic decisions, including family members, counsel, advisors and beneficiaries. We hope the verbiage below may be of assistance as examples of ways to clearly describe your intentions in your will. Unrestricted planned gifts are the most common and beneficial and allow the organization to direct funds to the most important needs at the time of receipt. The National Czech & Slovak Museum & Library welcomes your inquiries about planned giving and the type of bequest you hope to make.

UNRESTRICTED BEQUEST

“I give, devise and bequeath to the National Czech & Slovak Museum & Library (a nonprofit organization organized in Cedar Rapids, IA; tax identification number 51-0189030) , the sum of \$dollars (or the following described property).”

DESIGNATED BEQUEST

“I give, devise and bequeath to the National Czech & Slovak Museum & Library (a nonprofit organization organized in Cedar Rapids, IA; tax identification number 51-0189030), the sum of \$ dollars (or the following described property or assets).”

BEQUEST RESTRICTED AS TO PURPOSE

“I give, devise and bequeath to the National Czech & Slovak Museum & Library (a nonprofit organization organized in Cedar Rapids, IA; tax identification number 51-0189030), the sum of \$ dollars (or the following described property or assets) for the benefit of the National Czech & Slovak Museum & Library, to be used for the following purposes:
(set forth purpose or purposes).”

BEQUEST TO ESTABLISH AN ENDOWED FUND

“I give, devise and bequeath to the National Czech & Slovak Museum & Library (a nonprofit organization organized in Cedar Rapids, IA; tax identification number 51-0189030), the sum of \$ dollars (or the following described property or assets) to be used to establish The Jane Doe Endowed Fund for the benefit of the National Czech & Slovak Museum & Library.”

BEQUEST TO ADD TO AN EXISTING ENDOWED FUND

“I give, devise and bequeath to the National Czech & Slovak Museum & Library (a nonprofit organization organized in Cedar Rapids, IA; tax identification number 51-0189030), the sum of \$ dollars (or the following described property or assets) to be added to The Jane Doe Endowed Fund for the benefit of The National Czech & Slovak Museum & Library.”

RESIDUAL BEQUEST – UNRESTRICTED

“I give, devise and bequeath all of the rest of my estate (or _____ percent of the rest of my estate) to the National Czech & Slovak Museum & Library (a nonprofit organization organized in Cedar Rapids, IA; tax identification number 51-0189030).”

RESIDUAL BEQUEST – DESIGNATED

“I give, devise and bequeath all of the balance of my estate (or _____ percent of the rest of my estate) for the benefit of the (activity, project or program) at the National Czech & Slovak Museum & Library (a nonprofit organization organized in Cedar Rapids, IA; tax identification number 51-0189030).”

RESIDUAL REQUEST – RESTRICTED

“I give, devise and bequeath all of the balance of my estate (or _____ percent of the balance of my estate) for the benefit of the National Czech & Slovak Museum & Library (a nonprofit organization organized in Cedar Rapids, IA; tax identification number 51-0189030), to be used for the following purposes:
(set forth purpose or purposes).”

Share your passion. Inspire others. Create your legacy.

Please notify the NCSML of your planned giving intentions or further discuss these and other planned giving options by calling 319-362-8500 or development@ncsml.org.

Any planned gift qualifies you for membership in the NCSML’s Legacy Society. Enrolling in the Legacy Society is easy. It simply requires the completion of an intention form stating you have made provisions in your estate to benefit the NCSML. The form is a notification of your intentions for NCSML records; it is not legally binding and can be revoked at any time.

As a new member of the Legacy Society, you will be recognized at our annual Legacy Society Brunch. Your name will also be added to the Legacy Society plaque in the NCSML’s Wall of Tribute. You will also receive member updates and invitations to annual donor appreciation events. If you wish your identity and/or your intentions to remain anonymous, the NCSML will honor this request. Join the Legacy Society today to insure that the stories of Czechs and Slovaks are not forgotten.

Share your passion and inspire others to connect with these stories for generations to come.