



# *Cape Charles Historical Society Legacy Society*

## **Joining the Legacy Society**

The Legacy Society recognizes all those who have notified the Cape Charles Historical Society that they have included the Society in their will or other deferred giving plan. The gifts of the Legacy Society members build the unrestricted endowment of Cape Charles Historical Society, income from which will provide funds enabling the Museum to grow and remain open to the public; to build and share its archives; to create new exhibits; to maintain, improve and expand its buildings and grounds. Legacy Society members contribute to the growth of the Cape Charles Historical Society permanent endowment and encourage others to do the same.

### **Joining the Legacy Society requires just two steps:**

1. Arrange your estate to leave a gift to the Cape Charles Historical Society.

The most common ways to do this are:

- a. \*Bequest through your will or trust
- b. IRA/401K designation
- c. Life Insurance policy beneficiary designation
- d. Charitable Gift Annuity (life income contract)
- e. Charitable Trust (life income arrangements)
  - i. Charitable Remainder Trust
  - ii. Charitable Lead Trust

\* Simple bequest language available by contacting the Cape Charles Historical Society

2. Inform the Cape Charles Historical Society that you have made the necessary arrangements by returning the form below. This will give us permission to include your name in future listings of the Legacy Society.

*Note: Cape Charles Historical Society recommends that you discuss these options with your family and your attorney, accountant, insurance agent or financial planner as may be appropriate. You may also contact Cape Charles Historical Society to discuss the various ways to leave your legacy through the Cape Charles Historical Society Legacy Society.*

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**Legacy Society of the Cape Charles Historical Society, P.O. Box 11, Cape Charles VA 23310**

I/We have made a provision for the Legacy Society of the Cape Charles Historical Society in my/our estate plans and wish to be included in the Legacy Society and agree to be included in all published listings of Legacy Society members (unless requesting anonymous listing).

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Please print name(s) above as you wish to be listed

Mailing Address \_\_\_\_\_ City/State \_\_\_\_\_ Zip \_\_\_\_\_

Phone(s) \_\_\_\_\_