



# THE DISCOVERY MUSEUM LEGACY SOCIETY

March 15, 2016

Mr. Philip Rubin  
233 Algonquin Road  
Fairfield, CT 06825

Dear Phil,

As a fellow longtime supporter and friend of The Discovery Museum, I am writing to alert you to an exciting new development at the Museum with the hope of hearing your input. We are in the process of establishing the Discovery Museum Legacy Society to honor Museum supporters who have remembered us in their estate plans.

The Legacy Society is the result of many requests from Museum supporters who wanted to know how to go about remembering the Museum in their wills. After thinking about it, I realized that not only were we neglecting to help long-time friends contribute in this way, but we were also missing an opportunity to honor such donors now. As a long-time friend and benefactor of the Museum, I wanted you to be one of the first people to learn of this new way we have for enabling long-time friends to continue their support on into the future, and for The Museum to recognize the prominence of these bequests.

In the next few weeks, I will call you to tell you more about the Legacy Society and about how to become one of its founding members. I have become a member myself, and I can tell you that it is a good feeling to know that I will continue to have an impact on the good work The Discovery Museum does to educate Fairfield County children.

When contacted, I know I can rely on you, as The Museum has in the past, to give us your support and advice as to how to best establish the Legacy Society and honor its founding members.

Respectfully,

Tom Vos  
Chairman of the Board



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**PURPOSE:** The Discovery Museum Legacy Society was created at the request of friends of The Discovery Museum to give them a vehicle to continue their financial support of the Museum into the future. The Legacy Society recognizes those who have chosen to provide for The Discovery Museum, Inc. through gifts of bequests.

**IMPACT:** Donors who have remembered the Museum in their wills benefit the Museum by helping to ensure ongoing support for its mission of enriching the lives of young people in our Connecticut communities through STEM learning that encourages the science literacy and critical thinking skills necessary to become decision makers.

**MEMBERSHIP:** Individuals who elect to benefit the Museum through a gift of a bequest are eligible for membership to The Discovery Museum Legacy Society. A bequest is one of the simplest and most meaningful ways to provide for The Discovery Museum's future.

Bequests can take many forms. You may arrange for the Museum to receive:

- a specific dollar amount
- specified assets, such as securities or tangible personal property
- all or a percentage of the remainder of your estate after all other obligations (a residuary bequest)

You may make a bequest to The Discovery Museum, Inc. by preparing a new will or adding a codicil to your current will.

All founding members of The Discovery Museum Legacy Society will receive special recognition by the Museum.

**TAX-DEDUCTIBILITY:** The Discovery Museum, Inc. is designated by the Internal Revenue Service as a 501(c)(3) nonprofit organization. An outright bequest to The Discovery Museum, Inc. is fully tax-deductible for your estate tax purposes. The Museum's EIN is 06-0740527.

As with any decision involving your estate plans, we urge you to seek the advice of professional counsel when considering a gift to The Discovery Museum, Inc. We deeply appreciate your generosity.



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## HOW TO MAKE A BEQUEST: USEFUL LANGUAGE

The most useful bequest is an unrestricted bequest for the general purposes of the Museum. This permits the Museum to use your future gift wherever it is most needed at the time.

### SUGGESTED LANGUAGE FOR MAKING AN UNRESTRICTED BEQUEST

I give, devise, and bequeath [the sum of \_\_\_\_\_ dollars], [all of \_\_\_\_ percent of the rest, remainder, and residue of my estate of every kind and description (including lapsed legacies and devises)] to The Discovery Museum, Inc., 4450 Park Avenue, Bridgeport, CT 06604, for its general corporate purposes.

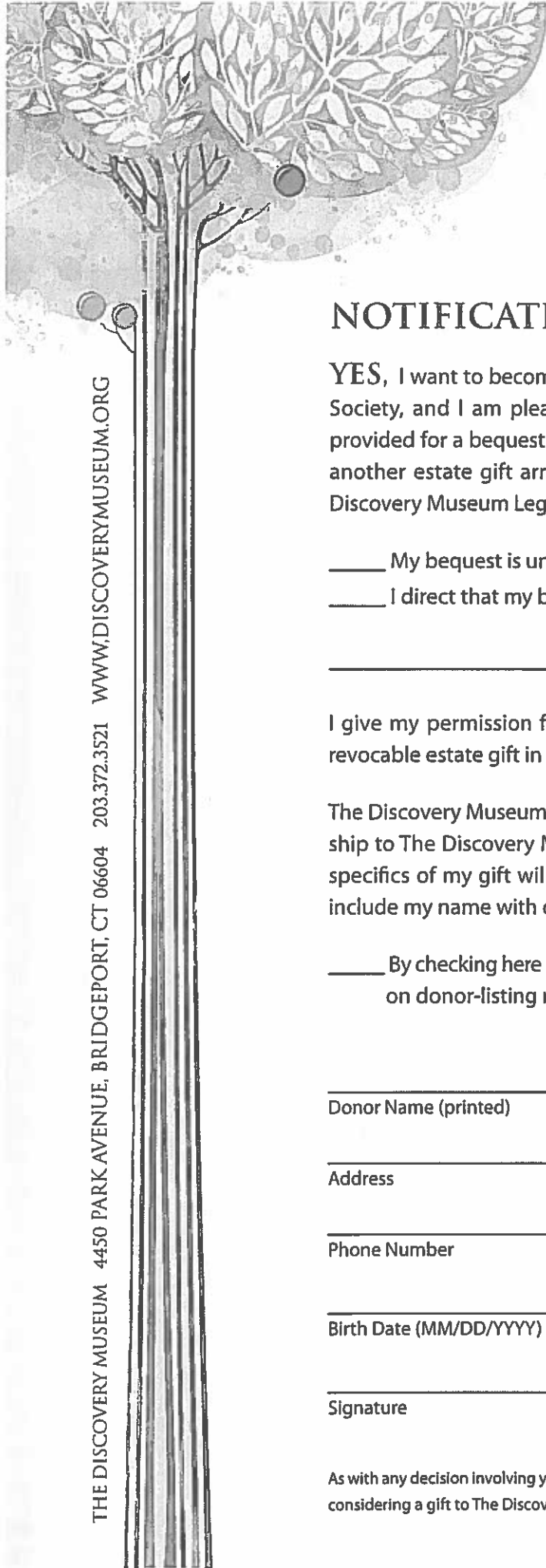
### SUGGESTED LANGUAGE FOR A SPECIFIC PURPOSE

I give, devise, and bequeath [the sum of \_\_\_\_\_ dollars], [all of \_\_\_\_ percent of the rest, remainder, and residue of my estate of every kind and description (including lapsed legacies and devises)] to The Discovery Museum, Inc., 4450 Park Avenue, Bridgeport, CT 06604 to create an endowment fund which, subject to the The Discovery Museum Inc.'s endowment spending rule, is to be used for the following purpose: [state the purpose].

### IMPORTANT NOTE

If you do specify a use for your bequest, the following language will ensure that your gift will always remain productive: If at any time in the judgement of the Board of Trustees of The Discovery Museum, Inc. the designated use of this bequest to further the general purposes of the Museum, giving consideration, where possible, to my special interest as described above.

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## NOTIFICATION OF REVOCABLE BEQUEST

YES, I want to become a founding member of The Discovery Museum Legacy Society, and I am pleased to advise The Discovery Museum, Inc. that I have provided for a bequest of \$\_\_\_\_\_ through a provision in my will, trust, or another estate gift arrangement, and in so doing, become a member of The Discovery Museum Legacy Society.

\_\_\_\_\_ My bequest is unrestricted.

\_\_\_\_\_ I direct that my bequest be used for the following purpose:

\_\_\_\_\_

I give my permission for the Museum to count the value of my bequest as a revocable estate gift in its fundraising goals.

The Discovery Museum, Inc. acknowledges that my future request and membership to The Discovery Museum Legacy Society remains fully revocable and the specifics of my gift will be treated as confidential. However, the Museum may include my name with other donors in publications and donor-listing reports.

\_\_\_\_\_ By checking here I indicate that I wish to have my name listed as "Anonymous" on donor-listing reports.

\_\_\_\_\_ Donor Name (printed)

\_\_\_\_\_ Address

\_\_\_\_\_ Phone Number

\_\_\_\_\_ Birth Date (MM/DD/YYYY)

\_\_\_\_\_ Signature

\_\_\_\_\_ Date (MM/DD/YYYY)

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