



# The Sitka History Museum

210 Seward Street Sitka, Alaska 99835  
Phone: 907 747 6455 Fax: 907 747 6588  
[www.sitkahistory.org](http://www.sitkahistory.org)

## MAKING A BEQUEST TO THE SITKA HISTORY MUSEUM

A bequest to the Sitka History Museum is a simple and convenient way to provide important support for the Museum's mission to preserve and promote the events, stories and artifacts of the human history of Sitka, as part of the Pacific Northwest Coast of North American, to inspire, educate and benefit the Public and future generations.

Donors who have remembered the Sitka History Museum in their wills have benefited the Museum in many ways, helping to build and maintain its collections and providing indispensable support for exhibitions, conservation efforts, and a range of educational activities. A bequest is one of the simplest ways to provide for the Museum's future and can take many forms.

You may arrange for the Museum to receive:

- a specific dollar amount
- specified assets, such as securities, real estate or tangible personal property
- all or a percentage of the remainder of your estate after all other obligations (a residuary bequest)
- You can name the Museum as contingent beneficiary should your heirs predecease you.
- You can designate your bequest for the Museum's general use, or you can restrict its use.
- You may wish to establish an endowment through your will to honor the memory of a family member or friend.
- You may make a bequest to the Museum by preparing a new will or adding a codicil to your present will.
- An outright bequest to the Museum is fully tax-deductible for estate-tax purposes.

### How to Make Your Bequest: Sample Language for Including the Sitka History Museum in Your Will

#### Bequest for General Purposes

I give, devise and bequeath to the Sitka History Museum, a not-for-profit organization organized and existing under the law of the state of Alaska (EIN – 92-0074478), presently located at 210 Seward Street, Sitka, AK, the sum of (\$ ) or (% of my disposable estate) or (description of property) to go to the permanent endowment.

OR

I give, devise and bequeath to the Sitka History Museum, a not-for-profit organization, organized and existing under the law of Alaska (EIN – 92-0074478), presently located at 210 Seward Street, Sitka, AK 99835, the sum of (\$ ) or (% of my disposable estate) or (description of property) to establish the \_\_\_\_\_ Endowment Fund. The principal of this fund shall be invested as part of the Museums’s permanent endowment and in accordance with its policies. The income there from is to be used by the Museum for (general operations or description of special purposes such as capital needs, the purchase of artifacts or specific programs). If at any time in the opinion of the Board of Directors it becomes impossible or impractical to use this bequest for such purposes, the income may then be used for such other closely aligned purposes as shall most nearly accomplish my wishes.

### **Bequest for Specific Purposes**

I give, devise and bequeath to the Sitka History Museum, a not-for-profit organization, organized and existing under the law of the state of Alaska (EIN 92-0074478), presently located at 210 Seward Street, Sitka, AK 99835, the sum of ( \$ ) or ( %) of my disposable estate) or (description of property) to be used for (description of special purposes such as capital needs, the purchase of artifacts or specific programs).

### **Contingent Bequest**

I give and bequeath the residue of the property, real and personal and wherever situate, owned by me at my death to (name heirs), if she/he/they survives me. If (named heirs) do not survive me, I give and bequeath my residuary estate to the Sitka History Museum, a not-for-profit organization, organized and existing under the law of the state of Alaska (EIN 92-0074478), presently located at 210 Seward Street, Sitka, AK 99835, to be used without restrictions.

### **PLEASE NOTE:**

The above is suggested language. It does not constitute legal advice and is not to be construed as legal advice in any manner. **Please consult with your attorney** concerning the best way for you to provide for the Museum in your estate plan. The staff of the Museum will be happy to work with you and your attorney in arranging your bequest. Having a conversation in advance with staff will ensure that your wishes will be carried out, particularly if you are considering a gift of an artifact or a financial gift with a restriction.