

SHMA's Endowment Fund

Our operating budget is finite and subject to fluctuations depending on our net income from each year's fund raising events.

In 2013, the Board of Trustees created the Steilacoom Historical Museum Association Endowment to provide more stable financial support for pursuing our mission. The intent is to grow a fund for major capital projects and operating shortfalls. The Endowment Fund is managed by the Greater Tacoma Community Foundation, with close oversight by the Endowment Subcommittee of SHMA's Finance Committee, following conservative fiduciary guidelines.

Our goal is to build the Endowment Fund so that the interest will provide a dependable source of income for our activities and we have a resource for emergencies, like major damage to one of our properties.

You can help with a donation to the Endowment. SHMA is a 501(c)(3) charitable organization. All donations over \$25 receive an acknowledgment for your tax records.

This effort is coordinated with the Pierce County Leave10 initiative, which encourages and assists people to set aside 10% of their estate to their favorite charity.

Planned Giving



Leave10.org

If you are interested in donating to SHMA endowment fund or in making a planned gift please call 253-584-4133.

Steilacoom Historical
Museum Association
1801 Rainier Street
PO Box 88016
Steilacoom, WA 98388



Steilacoom Historical Museum Association Planned Giving

*"Help us preserve
the best of Steilacoom."*



We serve the community

The Steilacoom Historical Museum Association preserves and explains the heritage of Steilacoom and our region.

- We maintain and preserve the 1857 Nathaniel Orr Home, Nathaniel Orr's Wagon Shop, and the historic Bair Drug and Hardware Store.
- We are the stewards of Nathaniel Orr's historic orchard.
- We care for more than 4,000 historic photographs and 10,000 artifacts from our past.
- We have an extensive library of historical materials available for researchers.
- We operate a museum with exhibits and information on historical topics.
- We sponsor historical lectures, events, and movies.
- We host Kids Club and other family activities.
- We conduct education programs with local schools.
- We sponsor or co-sponsor community events throughout the year.

We have been serving our community since 1970. With your support we can continue to serve our community for generations to come.

Help us with a planned gift

There are many planned giving approaches you can do now to support SHMA's activities in the future. All have tax advantages. Here are three:

- A bequest is a gift made by including a donation to SHMA in your will or trust document.
- You can set up a charitable gift annuity, which is an instrument that provides you, the donor, with an annual income. A portion of your donation is tax deductible. The balance left in the charitable gift annuity goes to SHMA upon your death.
- Your donation could purchase a life insurance policy on yourself or you can add SHMA as a beneficiary to a current life insurance policy.

Note that your gift can come in any form, not just cash. Our Endowment received a tremendous boost from a gift of a vacant parcel of land in Steilacoom.

We can help you

We have local financial advisors, tax accountants, and attorneys available to help you with the income tax and legal aspects of including SHMA in your estate planning.

These advisors are volunteers, just like all of SHMA's supporters. They can help you at no cost to:

- Identify which of the different approaches works best for you.
- Calculate the tax benefits for now and in the future.
- Give you the language to include SHMA in your will or trust.



Giving our children the opportunity to learn more about the history of our area is an example of the type of legacy you can leave with a planned gift to SHMA.

Join the Legacy Society

While all donations are accepted, an estate planning commitment of \$10,000 or more will make you a life member of the Nathaniel Orr Legacy Society. Members of the Legacy Society may be recognized on our website and in the newsletter.

The Society will recognize our valued donors at a special event every year. At the event, we will review SHMA's activities over the past year and have guest speakers on historical topics.

We will also provide opportunities for updates on legal and tax aspects of estate planning and charitable giving.