

Planned Giving Opportunities ***Helping to Preserve Our Past in the Future***

We invite you to help the **Equinunk Historical Society** preserve and make accessible the local history of the village of Equinunk and nearby communities and rural areas of Northern Wayne County, Pennsylvania. We ask you to be our partner in preserving and learning from the oral and written history and artifacts of this nature-blessed region, so that we not only remember our past, but also learn from it. The **Equinunk Historical Society** was chartered in 1981 as a not-for-profit charitable organization with these broad purposes:

- to bring together those people interested in history, and especially in the history of Equinunk and the surrounding area;
- to discover and collect any material which may help to establish or illustrate the history of the area;
- to provide for the preservation of such material and for its accessibility, as far as may be feasible, to all whom wish to study and examine it.

To this end, the Equinunk Historical Society has published several volumes of local history and produced three decades of programs, tours, and exhibits detailing and highlighting aspects of past life in rural northeast Pennsylvania. Many of the oral histories and documents preserved and presented would have been lost forever, without the efforts of the society.

To help the Equinunk Historical Society maintain its invaluable preservation and informational work in future years, we seek your partnership in a variety of opportunities for planned giving to benefit the Equinunk Historical Society:

Gifts by Will

Bequests by will have always been a very important source of support for the Equinunk Historical Society. It is one of the easiest ways to insure the future of the Society's work. We encourage you to include the Equinunk Historical Society in your will. We suggest that the bequest be in the following form:

"I hereby give and bequeath to the Equinunk Historical Society, a not-for-profit corporation, of Equinunk, Pennsylvania, 18417, the sum of \$ _____ for its general corporate uses and purposes."

Donated items which are Gifts of Personal Property

The Equinunk Historical Society always welcomes gifts of antiques or other personal property. Items of significance to the history of the region are especially welcome. Items not suitable for display or retention by the Society may be sold by the Society, to benefit its corporate purposes. Gifts of personal property may be claimed as a charitable donation for the year that the donation was given.

Gifts of Stocks, Bonds or Mutual Funds

Gifts of stocks, bonds or mutual funds shares are of great benefit to the Society. In addition, giving long-term appreciated securities can provide two income tax benefits to the donor: no tax is imposed on the appreciated portion of the gift (the capital gain), and the donor will receive a charitable deduction based on the security's fair market value.

Gifts of Life Insurance

Naming the Equinunk Historical Society as a full or partial beneficiary of a life insurance policy is another easy way to support the Society's work. In addition, contributing an insurance policy to the Equinunk Historical Society can enable a donor to make a larger gift and obtain a charitable tax deduction for the cash surrender value of the policy and premiums donated.

Gifts of Real Property

In the past the Equinunk Historical Society has benefited greatly from donations of real property. Its showcase Joel G. Hill Sawmill was donated to the Society. The Society reserves the right to retain donated real property or to sell such property, to best serve its corporate purposes. In addition, through a gift of real property with a retained *life estate*, a donor can transfer ownership of the property to the Society, yet continue to use and enjoy the property for the rest of the donor's life. Such a donation with retained life estate also offers possible tax benefits, including a charitable income tax deduction and savings in capital gains and estate taxes.

Charitable Remainder Trusts

A donor may make a gift of capital to the Equinunk Historical Society and continue to receive income from the capital asset, as well as a charitable tax deduction, through the creation of a charitable remainder trusts. Such a trust may be funded with cash or marketable securities.

Charitable Lead Trusts

A donor may also make a gift to the Equinunk Historical Society, by placing assets in a trust which designates that an amount of trust income be paid to the Society for a term of years. Once the trust terminates, the principal will revert to the donor or the donor's beneficiaries. Such a trust also provides a charitable tax deduction to the donor

All gifts are subject to approval by the Equinunk Historical Society. We advise you to consult your attorney or financial adviser for advice respecting any Planned Gift to the Equinunk Historical Society.

Please contact the Equinunk Historical Society, Post Office Box 41, Equinunk, PA 18417-0041, phone 570-224-6722, for additional information about these and other giving opportunities, including contributions to specific projects of the Society. Your inquiry will be handled in strict confidence.

The Equinunk Historical Society is a 501(c)(3), not-for-profit corporation under the Internal Revenue Code of the United States. All contributions to the Equinunk Historical Society are tax-deductible to the extent permitted by law.

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to benefit
the Equinunk Historical Society
Equinunk, Pennsylvania

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