

Planned Giving

History helps us to realize our place in the world and our individual responsibility to our family, neighbors, community, and world. It makes us think about the legacy we will leave. Are there favorite places, ideals, or programs that you value and that you want to survive for coming generations? Through your Will, you have the power to make changes in the world around you. In fact, our values may not be represented in the world if we don't make that investment.

You don't have to be wealthy to leave a legacy that will change the lives of the people you touch. Often donors say they never dreamed they could make a sizeable gift before they began thinking about leaving a gift in their Will.

By remembering the Historical Society of the Phoenixville Area (HSPA) in your Will, you can insure that your values will influence others in the future. Leaving a percentage or a specific dollar amount of your estate to fund a favorite program at HSPA is easy to do. We would like to help you accomplish that objective.

Confidentiality and Recognition

There is, of course, no obligation to tell the Society about your bequest. However, we would be happy to work with you and your financial advisors or legal advisors to develop bequest language and endowment descriptions that will be mutually beneficial to you and to the Historical Society of the Phoenixville Area.

The Society gives special recognition to all who have included the Historical Society of the Phoenixville Area in their Wills.

To receive recognition for your bequest, **please complete and return the HSPA Endowment Gift Forms**. All information will be held in the strictest of confidence.

A Word About Taxes

Unlike a cash gift, a bequest will not provide you with an income tax deduction. However, your estate should receive an estate tax charitable deduction for the fair market value of your charitable bequests pursuant to our understanding of current law. Please note that HSPA is a Pennsylvania non-profit corporation.

Please consult with your attorney, accountant, and/or other financial advisor(s) who can provide you with more advice and detailed information about a bequest and the tax consequences of your plans.

For more information, please contact Kurt A. Kunsch at 610-935-8304.