

WAYS TO GIVE

NCC LEGACY SOCIETY

The National Constitution Center is a public charity under Section 501(c)(3) of the Internal Revenue Code, which means that donations to the Center are tax-deductible to the full extent permitted by law. Donations may be in the form of cash; appreciated stock, bonds, or mutual funds; life insurance policies; retirement assets; or will or trust provisions. Two common ways to include the Center in your estate or trust plans include bequests and beneficiary designations. We recommend consulting your legal or tax adviser for guidance.

BEQUESTS

It is easy to make a bequest in your will or trust to the National Constitution Center and by doing so, you make nonpartisan constitutional education and civil dialogue part of your enduring impact. Unrestricted bequests or trust provisions permit the National Constitution Center to use your gift wherever it is needed most; restricted bequests or trust provisions underwrite the Center’s activities in areas of greatest interest to you.

You may direct gifts to the Center’s Endowment Fund to be professionally managed and invested toward our long-term goals, to the Annual Operating Fund to meet the Center’s immediate needs at the time your gift is realized, or designate gifts for a particular purpose. If you’re thinking about making a restricted gift, please consult with the Center in order to ensure that our strategic priorities align with your interests.

The following is sample language — as a starting point — to provide to your legal or tax adviser working on your will.

Suggested language for making an unrestricted gift by will or trust:

“I [Name] hereby give, devise, and bequeath [the sum of \$(dollar amount)] [(percentage) % of my residuary estate]¹ to the National Constitution Center (Federal Employer Identification Number 23-2434447), a not-for-profit organization, located at 525 Arch Street, Philadelphia, PA, 19106, for its general use and purposes.”

Suggested language for making a gift by will or trust for a specific purpose:

“I [Name] hereby give, devise, and bequeath [the sum of \$(dollar amount)] [(percentage) % of my residuary estate]² to the National Constitution Center (Federal Employer Identification Number 23-2434447), a not-for-profit organization, located at 525 Arch Street, Philadelphia, PA, 19106, to be used by it in support of [state the purpose or restrict the gift³ to the Center’s Endowment Fund].”

¹ Bracketed language represents alternative types of bequests—a specific dollar amount, or a percentage of an individual’s residuary estate.

² See footnote 1.

³ Please reach out to the NCC’s development office before restricting an estate gift, to ensure that the gift is applied to a continuing program.



BENEFICIARY DESIGNATIONS

Designating retirement account assets such as IRAs, 401(k)s, Keoghs, HR-10s, and 403(b)s is another way to support the National Constitution Center. Such assets could otherwise be subject to significant estate, income, and other transfer taxes. By designating the Center as the primary beneficiary of any remaining retirement account assets, the gift may avoid both estate and income taxes, while also supporting the Center.

Another option is to designate the National Constitution Center as the owner and beneficiary of a paid-up life insurance policy or donate a policy to the Center.

Beneficiary designations can generally be established by naming “National Constitution Center, 525 Arch Street, Philadelphia, PA, 19106 (Tax ID Number 23-2434447)” as a beneficiary.

For more information about making a planned gift to the National Constitution Center, please contact Vice President of Development **Lauren Sylling** (lsylling@constitutioncenter.org).

