



PLANNED GIVING



ELDRESS BERTHA LINDSAY LEGACY SOCIETY

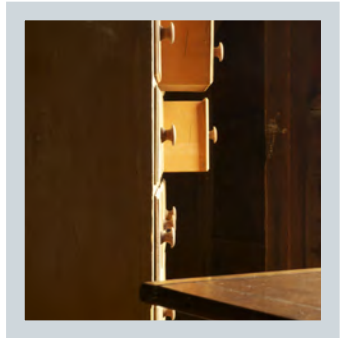


The Eldress Bertha Lindsay Legacy Society was founded in 1996 by friends of the Village who wished to honor the last Shaker Eldress. Eldress Bertha Lindsay dearly loved her Shaker home and pioneered the effort to preserve it for future generations.

The Society is composed exclusively of donors who have pledged a minimum gift of \$10,000 to the growth of the Village through bequests, trusts or other planned giving instruments. Members of the Eldress Bertha Lindsay Legacy Society are recognized publicly every year and invited to special events at the Village.

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For some, a planned gift is a preferred way to support the financial foundation and mission of the Society. Examples of popular and valuable planned gifts follow. We recommend you consult your financial advisor and estate planning counsel to determine the best way to carry out your planned gift to produce the greatest benefit for both the Village and you.



Gift Under Your Will

The most popular and simplest planned gift is a legacy under your will. It can be a gift of a specific dollar amount, or a percentage of your residuary estate.

Gift of Real Property

A gift of real property can not only produce tax savings—a valuable income tax deduction, or estate tax deduction if given under your will—but also provide the Village with a valuable asset to build the Endowment. If the property has unique historical value, the Village might consider retaining and maintaining it, but it also might be sold, with the proceeds going to our Endowment Fund. Such a gift can be made during your life or under your will, or by deed reserving your life use, subject to thoughtful interactive planning by both you and the Village.

Gift of Antiques or Collectibles

A gift of an antique or historical artwork or other artifact can be made during your life or under a will, with a tax benefit to you. The value of the income tax deduction may vary depending on how the gift can be used or exhibited, a determination that is made by the Collections Management Committee.



Gift of Life Insurance Policy

As with appreciated stock, this gift can be made in the present and allows you to take a charitable deduction at the time of transfer in an amount your advisors and the insurance company will determine. You designate the Village as beneficiary of the policy and assign ownership to the Village at the same time. The Village will either maintain the policy in effect for your lifetime or consider surrendering it for its cash value, whichever you prefer. If the value of the policy is insufficient to fund premiums going forward, you can consider an annual gift to the Village sufficient to pay the annual premium.

Gift via Beneficiary Designation from your IRA or Other Tax Deferred Plan

Except where a spouse is the designated beneficiary, an IRA is subject to estate tax at the death of the account holder, and distributions from the account are subject to income tax as well. Therefore, a gift to the Village's Endowment Fund from such an account can be highly tax leveraged, in that the Village would receive 100% of the gift where the beneficiaries of the account holder might in some cases receive less than 50% of the account after estate taxes and income taxes are paid. To establish such a gift, you can simply designate the Village as the beneficiary (or, if you have a spouse, the contingent beneficiary) of the account.



Gift Made by Creating a Trust

By creating a special type of trust known as a charitable remainder trust, a donor can distribute cash or appreciated securities to this trust, enjoy increased income from these assets during your life, and receive a significant tax deduction for the actuarially computed value of the remainder of the trust, which will pass to the Village at the donor's death. Another special type of trust is a charitable lead trust, under which the Village would receive the income from the trust for a term of years, with assets remaining in the trust reverting to the donor or his designated beneficiaries when the trust term ends. Because of the complexity and expense associated with the creation and administration of these trusts, they make sense only where the value of assets to be placed in trust approach or exceed \$1,000,000.

You should confer with your financial and investment advisors and your attorney to develop the specifics for making any of these gifts. Please consult us, too. If you call or email the Village, we can put you in touch with the right person here, to help you develop your planned gift. And unless you request anonymity, we would like to recognize you and your gift to express our appreciation and encourage others to join you in building the Village's future.

For more information please contact info@Shakers.org.

Canterbury Shaker Village is dedicated to preserving the 200-year legacy of the Canterbury Shakers and to providing a place for learning, reflection, and renewal.

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