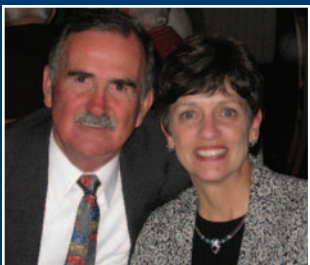


A Bequest with Tax Savings

Rudy and Louise Shappee are committed volunteers of the USS Midway Museum. Rudy is the Exhibits Manager for the Museum and his work takes him to many other museums around the country. Knowing that the day would someday arrive when they would no longer be able to be actively involved with Midway, they looked at other ways to support the Museum. After meeting with their trust attorney, the Shappees decided to leave a portion of their estate to the Museum in the form of a bequest. Rudy and Louise will continue to use their trust funds during their lives, and upon their deaths a portion of their trust will be made as a gift to the Museum. They are both thankful in knowing that their gift will allow them to continue to support the goals of the USS Midway Museum well into the future.



Request Further Information

I have reviewed your brochure on Bequests and:

- I would like to speak with someone who can provide additional bequest information.
- I would like to receive information on other charitable tax-planning options.

Name: _____

Street: _____

City: _____

State/Zip: _____

Home Phone: _____

Work Phone: _____

E-mail: _____

(Please complete and return to the USS Midway Museum. All inquiries are treated with complete confidence.)

Jim Eckel, CFP
Director of Planned Giving
(619) 398-8237 • F: (619) 544-9188
jeckel@midway.org • www.midway.org



Live the Adventure, Honor the Legend™

910 N. Harbor Drive • San Diego, CA 92101

© 2008 Midways of Giving

YOUR LEGACY



To Your Country



Midway Legacy

The USS Midway Museum brings to life the achievements of the longest-serving U.S. Navy aircraft carrier of the 20th century. During its 47-year odyssey, the USS Midway represented the core values of America, led several international humanitarian missions, and served as a leading defender of the United States of America and its allies.

The USS Midway continues its mission today as an educational facility for thousands of school children, an event center for numerous functions and galas, and as a living memorial to the 225,000 officers and sailors who served aboard her.

Help us preserve this precious icon of U.S. naval history and become a member of our Patriot Society by making a planned gift to the Museum. By working with your professional advisor, we can ensure that your gift will be beneficial to you and to the USS Midway Museum. Your gift will be recognized aboard Midway in appreciation for your support in this endeavor.

The Benefits of a Charitable Bequest

A charitable bequest is a directive written into a will or trust that states a gift is to be made to a qualified, exempt non-profit organization when you pass away. A charitable bequest can help you save estate taxes and at the same time provide financial support to the USS Midway Museum to help carry out its mission. A bequest is one of the easiest gifts you'll ever make! All you need to do is include appropriate language in your will or trust specifying a gift be made to the USS Midway Museum.

The bequest may be made as:

- a percentage of your estate,
- a specific asset, or
- the residual (what is left over) from your estate.

Other Types of Giving

Certain types of property pass outside of a will or trust. These assets require that you name a beneficiary by completing a beneficiary designation form. To make a bequest of these assets, you should contact the company or entity from which you purchased the asset. Here are a couple of examples:

Charitable Trusts: You place cash, securities, real estate or any other property into a trust. The trust then sells the property and makes income payments to you for your lifetime with the remaining trust property going to the USS Midway Museum after you have passed away. Charitable trusts provide income tax deductions, capital gains savings, and the knowledge that your gift will benefit the USS Midway Museum.

Gifts of Life Insurance: You can gift your existing non-needed life insurance policy to the USS Midway Museum. You will receive a current income tax deduction and the USS Midway Museum receives the death proceeds when you have passed away.