

PRESERVATION  
ESTD SOCIETY 1920  
*of* CHARLESTON

## Planned Giving

We are grateful to those who remember the Preservation Society of Charleston through a bequest or other type of planned gift. Whether you would like to give now or after your lifetime, strategic planning allows you to align your charitable giving with your overall financial and estate plans. Many giving plans even offer you financial benefits, so you can be sure you'll make the greatest impact on the Preservation Society while maintaining the future security of you and your loved ones.

### ENSURE YOUR LEGACY

#### BEQUESTS THROUGH A LIVING WILL OR TRUST

There are many ways to include the Preservation Society of Charleston in your estate plans — including, but not limited to, leaving the Society in your will. Here is some of the simple, yet sufficient basic language for including the Society in your estate plans:

“I give, devise and bequeath to the Preservation Society of Charleston, a nonprofit corporation of the State of South Carolina, located at 147 King Street, Charleston, SC 29401, \_\_\_\_ % of my estate.”

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Choose one:

1. The sum of \$\_\_\_\_\_.”
2. \_\_\_\_\_ shares of stock in \_\_\_\_\_ Company.”
3. My real property commonly known as \_\_\_\_\_.”

## **LIFE INSURANCE**

Set up a permanent life insurance policy with the insurance company of your choice. Name "THE PRESERVATION SOCIETY OF CHARLESTON" as a beneficiary of your life insurance policy, or assign the policy to THE PRESERVATION SOCIETY OF CHARLESTON and use the cash value as a charitable deduction.

## **SECURITIES OR FINANCIAL ACCOUNTS**

IRAs, 401(k) plans, deferred compensation plans and annuities can all be used to gift assets to the Society. Simply list "THE PRESERVATION SOCIETY OF CHARLESTON" as a beneficiary, either with a percentage of the total value or as a contingent beneficiary (if you are choosing someone else as the primary beneficiary).

## **CONTACT US**

We recommend that you consult with your attorney or tax advisor for the various tax benefits and restrictions that may apply to your specific situation. We are always available to answer questions or help arrange a planned gift to PSC. Should you name PSC in a planned gift, we would welcome a copy of the legal document or section of document that accompanies your gift. This can make estate administration easier when your gift is received.

Contact: Director of Advancement, Courtney Theis at [ctheis@preservationsociety.org](mailto:ctheis@preservationsociety.org) - 843.722.4630 ext.17