

Ways to Make History Your Legacy

Including the Historical Society of Helotes in your will or family trust is a simple way to pass along something special that lives on through our work. Your gift will create a legacy to help ensure that the history of Helotes will be preserved and shared for generations to come. Please check with your attorney or tax advisor before making any changes to your estate or beneficiary designations.

Planned Giving – 1966 HSH Legacy Society

The 1966 HSH Legacy Society, named in honor of the founding year of the Historical Society of Helotes, are members and friends who have committed to our future by including the Historical Society of Helotes in their estate plans. Their generous support will allow us to engage and educate the public in meaningful historical learning for future generations. 1966 HSH Legacy Society members know they are ensuring the Society's commitment to preserving Helotes' past for future generations and leaving behind their legacy of generosity in our community.

Please let us know if you named the Historical Society of Helotes as a beneficiary in your estate plans. Notifying us of your plans will enable us to plan for the use of your future gift. However, we will keep your name and gift strictly confidential if you prefer to remain anonymous.

Giving Options

Bequests – Gifting a Portion of Your Estate in Your Will or Family Trust

Gifting a portion of your estate in your will or family trust offers flexibility. You can specify that the Historical Society of Helotes receives a specific dollar amount from your estate, specific assets (e.g., real estate, securities), a percentage of your estate, or the remainder of your estate after paying expenses and providing for heirs. To make a charitable bequest to the Historical Society of Helotes, please consult your attorney or advisor before adding this or any charitable bequest to your will, family trust, or retirement account.

Sample Bequest Language – Unrestricted Gift

For an unrestricted gift that allows the Historical Society of Helotes to determine how to use the funds based on the most pressing needs, you can use the following language for your will and/or trust:

"I give, devise, and bequeath to the Historical Society of Helotes, a nonprofit corporation at P.O. Box 707, Helotes, TX 78023, or its successor thereto, _____ [written amount or percentage of the estate or description of property] for its unrestricted charitable use and purpose."

Sample Bequest Language – Restricted Gift

To designate your restricted gift with a provision for a particular purpose, you can use the following language for your will and/or trust:

"I give, devise, and bequeath to Historical Society of Helotes, a nonprofit corporation at P.O. Box 707, Helotes, TX 78023, or its successor thereto, _____ [written amount or percentage of the estate or description of property]. This gift should be used for [describe purpose] if and so long as the Historical Society of Helotes determines that the need exists. If the Historical Society

of Helotes shall determine at the outset or at a later time that the need does not exist, or no longer exists or for some reason it is not possible (or prudent) to administer my gift as originally intended, then the Historical Society of Helotes may, in its sole and uncontrolled discretion, direct the use of my bequest for a purpose related as closely as possible to that stated above."

Insurance

If you have a life insurance policy that has outlasted its original purpose, consider gifting it to the Historical Society of Helotes. For example, you may have purchased a policy to provide for minor children and they are now financially independent adults.

IRA Charitable Rollover

If you are 70½ years old or older, you can take advantage of a simple way to give to the Historical Society of Helotes and receive tax benefits in return. You can give up to \$100,000 from your IRA directly to a qualified charity without having to pay income taxes on the money.

Real Estate

The gift of appreciated real estate, such as a home, undeveloped land, farmland, or commercial property, is a great way to support projects and programs of the Historical Society of Helotes.

Securities

Donating appreciated securities, including stocks or bonds, is an easy and tax-effective way for you to make a gift to the Historical Society of Helotes. You can give appreciated stock or mutual funds that you have owned for more than one year to avoid capital gains tax and receive a charitable income tax deduction from the Historical Society of Helotes.

Contact Us

Please contact us at info@historicalsocietyofhelotes.org for our non-profit tax identification number and other related information you will need to provide to your financial institutions.