



Contact us, to talk about planned giving. Call Executive Director, Lynne Harakal at 252-638-8558 or email xxxxxxxxxx

The mission of the New Bern Historical Society is to celebrate and promote New Bern and its heritage through events and education. You can help continue the vision of the founders through a planned gift.

In 1923, Judge Romulus A. Nunn and other Craven County citizens founded the New Bern Historical Society “to preserve for future generations the wealth of historical material found in New Bern.” The vision of these New Bernians continues today and is reflected in an active calendar of educational events/programs and social gatherings. Membership has grown to approximately 700 with hundreds of volunteers contributing to our projects, programs and events each year.

The organization owns and operates both the historic 18th century Attmore-Oliver House and Gardens, home of our administrative offices, and the New Bern Civil War Battlefield Park.

The Historical Society is a non-profit membership organization with an IRS 501 (C) 3 tax-exempt classification.

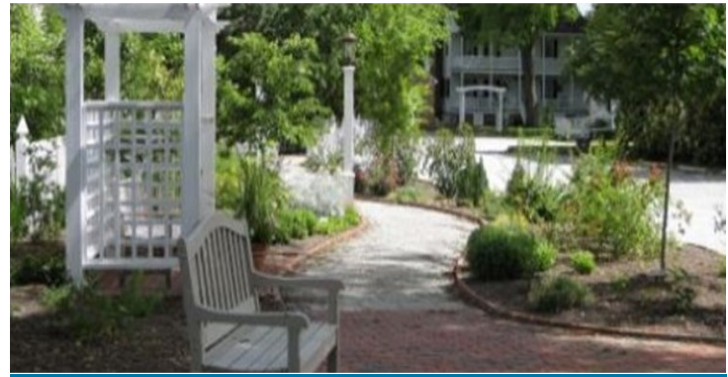
new bern historical society

Attmore Oliver House Campus
511 Broad Street
New Bern, NC 28562

New Bern Battlefield Park
Battlefield Trail—at the entrance to Taberna

Phone: 252-638-8558
E-mail: adminoffice@NewBernHistorical.org
www.NewBernHistorical.org

**FOUNDERS CIRCLE
PLANNED GIVING**



new bern historical society
Attmore Oliver House & Gardens · New Bern Battlefield Park

The founders of The New Bern Historical Society sought to “preserve for future generations, the wealth of historical material found in New Bern” Through your bequest or other planned gift, you can ensure that the historic treasures of New Bern will be there to inspire future generations..

The Founders Circle was established to acknowledge the valuable contributions of those who include The New Bern Historical Society in their estate plans. The Founders Circle not only salutes the founder’s foresight, it celebrates those who continue their efforts. By including The New Bern Historical Society in your estate plans, you are ensuring that The New Bern Historical Society will be able to build on the strength of its collections and educational programs.

The New Bern Historical Society offers many planned giving opportunities. Please consider the options and consult with your financial advisor. Please let us know if you decide to include us in your plans. Call Executive Director, Lynne Harakal at 252-638-8558 or e-mail xxxxxxxx.

WAYS TO LEAVE A LEGACY AT THE NEW BERN HISTORICAL SOCIETY, ATTMORE OLIVER HOUSE & GARDENS, NEW BERN BATTLEFIELD PARK

BEQUEST

A gift of cash, securities, or real property made upon the donor’s death through provisions in a will or living trust. The amount of the gift is exempt from estate taxes.

RETIREMENT PLANS

Designation of The New Bern Historical Society as the beneficiary of a donor’s qualified pension plan, IRA, Keogh, or employee stock option plans. Allows the donor use of these assets during his or her lifetime, while providing the donor with the opportunity to make a large future gift and reducing his or her taxable estate.

CHARITABLE REMAINDER TRUST

An irrevocable transfer of assets to a trust naming The New Bern Historical Society as the ultimate beneficiary or one of several beneficiaries. The donor receives annually a life income of a set amount or fixed percentage. The donor also receives immediate tax deduction and may add to the trust in future years. If the donated assets consist of appreciated securities, capital gains taxes also may be reduced.

CHARITABLE LEAD TRUST

An income producing asset placed in a trust, the income of which is contributed to The New Bern Historical Society for a designated period, after which the asset is returned to the donor or beneficiary.

GIFTS OF LIFE INSURANCE

If your need for life insurance has decreased, transforming the policy into a gift can help you meet philanthropic goals and realize income tax savings, estate tax advantages and extend your charitable reach with a low annual cost. Transferring ownership of a cash value policy to The New Bern Historical Society may allow you to receive a tax deduction based on its current value.

ENDOWMENTS

Any of the above methods or a lifetime gift can be used to establish a new endowment, or add to The New Bern Historical Society endowment through the North Carolina Community Foundation.

