



**Museum of Sonoma
County Legacy Circle**

Ensuring the Museum's
Financial Future

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The Museum of Sonoma County (MSC) has established the **Museum Legacy Circle** to recognize generous supporters who create planned gifts or bequests from their estate. These gifts can be directed toward the Museum's endowments, expansion funds, exhibitions, collections, or general operating support.

When making a legacy gift to the Museum, you ensure the Museum's capacity to thrive by joining those members of our community who have let us know that we are included in their estate plans.

The following are some examples of ways to make a charitable donation through planned giving and join the Museum Legacy Circle:

Members of the Museum Legacy Circle receive special recognition and benefits, knowing that they are making a difference



Museum of Sonoma County Sculpture Garden was established in 2011 thanks to the generosity of Evert and Norma Person (Pictured sculpture by Bruce Johnson)

- **Include a gift to MSC in your will or revocable trust.**

You can choose a specific dollar amount or percentage of your estate; your estate receives a charitable deduction for your bequest to the MSC.

- **Designate MSC as a beneficiary in your retirement plan.**

This can provide an important gift at considerable savings.

- **Designate MSC as a beneficiary in your will, trust, life insurance or qualified retirement plan.**

You can also purchase a new policy to benefit MSC.

- **Establish a life income trust that enables you to receive income for life while making a gift to the MSC.**

This type of planned gift allows you to obtain an income tax deduction, reduce your estate taxes, and protect your financial security during your lifetime.

- **Assign tax-advantaged gifts of securities, property, or art to be made over time, during your lifetime.**

Museum of Sonoma County encourages you to reach out to your legal counsel and/or tax advisor to guide you in a way that will ensure full compliance with the law and prevailing tax codes.

What Will My Gift Accomplish?

Planned gifts can be directed to the Museum of Sonoma County's Endowment Fund, which has long been the financial driver for the MSC's budget and has allowed the institution to flourish artistically and to become a model for prudent fiscal management. The principal of the Endowment Fund is invested to increase over time. MSC uses the income generated to support general operations and innovative programming. Planned gifts may also be designated as unrestricted or be specifically made to support a specific program or for collections care.

Donors to the Museum Legacy Circle can make their planned gifts with confidence, knowing that the Museum's endowment funds are managed through partnerships with the Community Foundation of Sonoma County and the trust department of Exchange Bank. Both the Community Foundation and Exchange Bank are available to address any questions you may have, and we are more than happy to connect you with the appropriate person to discuss your plans.

Museum Legacy Circle members ensure historical and artistic excellence, from outstanding exhibitions and community programs to the care of the Museum's extensive permanent collection, which will continually be upheld at the Museum of Sonoma County, a Smithsonian Affiliate museum.



Digital rendition (above) for the Sonoma Stories permanent exhibit planned opening this Summer 2023 celebrating Sonoma County history as told by our community

Benefits of Joining the Legacy Circle

- Potential tax deductions as the result of your generous donations
- Exclusive invitations to Museum events and programs, including events with the executive director and curators
- Recognition on the Museum's donor panel
- Recognition on the Museum's website and in MSC publications

We invite you to join the Museum Legacy Circle and be a part of sustaining the MSC's financial foundation for generations to come.

If you would like more information or have made this commitment and are ready to notify the Museum of Sonoma County, please contact MSC executive director Jeff Nathanson at jnathanson@museumsc.org or (707) 579-1500 x102.



MUSEUM
of SONOMA COUNTY
ART • HISTORY



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If you would like more information about the **Museum Legacy Circle**, please contact Executive Director Jeff Nathanson at jnathanson@museumsc.org or (707)579-1500 x102