

Not only has Chester County played a leading role in the history of our region, our state, and our nation, but the Chester County Historical Society is widely regarded as one of Pennsylvania's foremost history museums and educational centers.

Telling the story of our rich history to audiences of all ages brings us all together, and makes us the vibrant and diverse community we are today.

Your Planned Gift to the Chester County Historical Society Endowment Fund will uphold our organization's mission, strengthen our quality of life, and ensure that the story is told again and again, for generations to come.

#### MISSION

CCHS is a not-for-profit educational institution whose mission is to promote an understanding of the history of Chester County and southeastern Pennsylvania by collecting, preserving, exhibiting and interpreting that history and its relationship to the region, and nation beyond, to audiences of all ages and interests.

#### HOW YOU CAN GIVE

There are many options available, depending on your circumstances and the nature of your gift. You may also be surprised by the variety of assets the Chester County Historical Society accepts via our partnership with the Chester County Community Foundation.

#### CONSULT THE DEVELOPMENT OFFICE AT CCHS

Contact the Development Office at [cchs@chestercohistorical.org](mailto:cchs@chestercohistorical.org) or call 610-692-4800 for more information on making a contribution to CCHS.



THE CHESTER COUNTY HISTORICAL SOCIETY

PUTTING THE  
PIECES TOGETHER  
ENSURE YOUR  
LASTING LEGACY

Estate and Planned Giving Opportunities

THE RECORD OF OUR PAST  
IS PART OF OUR QUALITY OF  
LIFE TODAY



CHESTER COUNTY HISTORICAL SOCIETY

225 NORTH HIGH STREET

WEST CHESTER, PA 19380-2691

610-692-4800 | [CHESTERCOHISTORICAL.ORG](http://CHESTERCOHISTORICAL.ORG)

CCHS'S ENDOWMENT FUND IS HELD IN TRUST BY THE  
CHESTER COUNTY COMMUNITY FOUNDATION

28 WEST MARKET STREET - THE LINCOLN BUILDING

WEST CHESTER, PA 19382-9997

610-696-8211 FAX: 610-696-8213

[WWW.CHESCOCF.ORG](http://WWW.CHESCOCF.ORG) | [INFO@CHESCOCF.ORG](mailto:INFO@CHESCOCF.ORG)

EIN23-27773822

FOR MORE INFORMATION ON CCHS AND OTHER  
WAYS TO SUPPORT, CALL 610-692-4800  
OR VISIT - [CHESTERCOHISTORICAL.ORG](http://CHESTERCOHISTORICAL.ORG)

CCHS is officially registered as a charitable organization in the Commonwealth of Pennsylvania. A copy of the official registration and financial information may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania 800-732-0999. Registration does not imply endorsement.



HELP MAINTAIN THE HISTORY OF GENERATIONS PAST, WITH A GIFT FOR GENERATIONS TO COME



With a gift, you can help preserve and share our rich heritage while leaving your mark on the future.

Planned Giving philanthropy is a way to combine donations with financial and estate planning. The advantage for both donor and recipient is that a Planned Gift is part of a longer range financial plan for the individual while it ensures a predictable, long-term income stream for the beneficiary. Planned Giving offers donors flexibility and creativity.

Unlike annual gifts that are made from current income, Planned Gifts are usually made from capital assets that include cash, appreciated securities, life insurance, retirement plans and real estate.



PLANNED GIVING OPTIONS

**CASH:** Cash gifts may be made by check, credit card, from donor advised funds, or private foundations.

**APPRECIATED ASSETS:** Donating publicly traded securities that have appreciated in value over the long term (at least 12 months) can benefit both you and CCHS. In most cases, you avoid capital gains taxes and are able to receive an income tax deduction for the market value of the securities on the date of the gift.

**BEQUESTS:** Including CCHS in your will is easy, and should your circumstances change, it is also revocable. You may choose to designate CCHS as a remainder beneficiary, or as the recipient of a specific dollar amount, item, or percentage of your estate. The Development Office can provide you and/or your attorney with sample language to include in your will.

**CHARITABLE GIFT ANNUITIES:** A charitable gift annuity is a way to make a gift to CCHS, and still receive an income for yourself or others. It is a contract under which a charity, in return for a transfer of cash or other property, agrees to pay a fixed sum of money to you on a regular basis. At your death, CCHS receives the remainder of the annuity and applies the funds to the program you specified at the time of your gift.

LIFE INSURANCE AND INDIVIDUAL RETIREMENT

**PLANS:** You may designate CCHS as a beneficiary of a life insurance policy or IRA. For some, the annual transfer of a required distribution from an IRA is an attractive tax planning option.

**TRUSTS:** For those looking to make larger gifts while realizing income and/or estate tax savings, a trust may be an option for you. If you are considering a gift of real estate, or establishing a trust, including a charitable lead trust and/or a charitable remainder trust to benefit CCHS, please contact the Development Office so we can assist you and your professional advisors as needed.

\* Please note that as a matter of policy, CCHS must sell all gifts of real estate, utilizing the proceeds in accordance with the donor's wishes.

\* The information in this brochure is not intended as legal advice. Please consult your attorney or other professional advisors.

ABOUT THE GILBERT COPE SOCIETY

If you have already included CCHS in your estate plans please let us know. We would like to thank you for your generous intent and, if you are willing, to welcome you into the Gilbert Cope Society, which recognizes individuals like you. Gilbert Cope was a founder of CCHS. At the age of seventeen, his interest in genealogy blossomed and led to a career in historical research. His collection of photographs, which now belongs to CCHS, along with his 1881 book *The History of Chester County*, tell the stories of neighbors, homesteads and families that are a legacy to us all.

