



# The Will: A Lasting Gift to the Ohio Genealogical Society

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## What are your benefits?

- **A bequest might reduce the tax liability on your estate.**

The Ohio Genealogical Society is a tax-exempt, not-for-profit organization and is eligible to receive tax-deductible bequests. Contributions to the Ohio Genealogical Society, therefore, might reduce the taxes paid on your estate, depending on the size of your estate and your tax bracket. Your attorney and/or financial advisor can provide the details.

- **The amount of your bequest to the Ohio Genealogical Society is determined by your needs.**

It is natural and expected that most people leave the bulk of their estates to spouses, children, or other loved ones. In this case, most people specify an amount to be given to the Ohio Genealogical Society. Other individuals, knowing that their loved ones are well provided for, choose to leave a titling portion of ten percent of their estates. Still others, aware that they might well outlive some or all of their beneficiaries, choose to leave a residual estate.

The amount of the bequest depends on your needs and your circumstances.

## How will I be remembered?

- **Your gift will be recognized.**

We will report your bequest in the Ohio Genealogical Society's newsletter, *Ohio Genealogy News*, and in our annual report. If you request, specific purchases will be identified as gifts from you. Major bequests will be identified with plaques so that your gift will be remembered. If you prefer, we can recognize anonymous bequests as well.

- **Your gift will make a difference.**

In 100 years, many genealogical and historical societies will no longer exist but, with your help, the Ohio Genealogical Society will. Your bequest will secure that future and assure that a depository for the history of your family, your ancestors, and your descendants will be available. Your bequest will make it possible to preserve many types of government and private documents and materials that otherwise would become unavailable or be destroyed. Your bequest will allow us to grow at a pace necessary to remain abreast with new technology and changing research needs. Your bequest will make a difference.

## Who leaves bequests?

**Over the years, many individuals have remembered the Ohio Genealogical Society in their wills. Those individuals....**

- Love genealogy.
  - Love Ohio.
  - Love the Ohio Genealogical Society.
  - Understand the vital service that the Ohio Genealogical Society provides in preserving family histories and the materials that record the lives of millions of individuals with Ohio ties
  - Value the Ohio Genealogical Society library.
  - Support our educational efforts and programs.
  - Value our publication efforts.
  - Appreciate our efforts to disseminate genealogical information.
  - Want to help others.
  - Want to give a lasting gift to future generations.
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## Here's how to make your bequest.

Consult with your attorney about writing or revising your will. If you don't have a will, the cost is modest and, more importantly, the cost to your estate of not having a will usually is far greater than the cost of making one. (Besides, it is a legal document that will be sought by future generations of genealogists!)

When writing your will, be certain to use our official name:

### **Ohio Genealogical Society**

Typical wording for various types of bequests is included in the following examples:

#### **For specific amount or item:**

"I give, devise and bequeath to the Ohio Genealogical Society, 611 State Route 97 W, Bellville OH 44813-8813, \$\_\_\_\_\_ (or list of items) to be used by said organization to carry out its objectives."

#### **For percentage:**

"I give, devise and bequeath to the Ohio Genealogical Society, 611 State Route 97 W, Bellville OH 44813-8813, \_\_\_% of my estate, to be used by said organization to carry out its objectives."

#### **For residue:**

"I give, devise and bequeath to the Ohio Genealogical Society, 611 State Route 97 W, Bellville OH 44813-8813, all the residue of my estate, including real and personal property, to be used by said organization to carry out its objectives."

Ask your attorney to check and revise the wording, as necessary, to comply with state laws and your wishes.

## Gifts that provide a living income.

It is possible that you have assets that would make wonderful gifts to the Ohio Genealogical Society, but those assets are filling a current need for yourself or your family. For example, you may own appreciated securities that currently are providing dividends, but are highly appreciated and will be needed to supplement your retirement. After that time, however, they could make a valuable gift to the Ohio Genealogical Society.

There are options that would allow these assets to be used to establish a charitable remainder trust where the property could be sold (without incurring capital gains taxes) and reinvested in high-yielding securities that would provide income for a set period or the rest of your life.

Income could be determined as either a fixed amount (annuity trust) or as a set rate (unitrust). At the end of that time, the remainder would go to the Ohio Genealogical Society.

Not only would this arrangement save you capital gains tax in most cases; it also would provide an immediate income tax deduction based on factors such as your age and the amount of income you would receive.

The Ohio Genealogical Society has paired with the Richland County Foundation, a community endowment founded in 1945, to provide management of charitable gift annuities. They are limited to working with OGS members who live in Ohio. Others should contact their financial advisor to set up a charitable gift annuity.



**OHIO GENEALOGICAL SOCIETY**  
611 State Route 97 W  
Bellville OH 44813-8813  
Phone: 419-886-1903

## Remember The Ohio Genealogical Society In your Will

*A bequest is a lasting  
gift ...*

*Remembering you  
and helping others*