

The Keeler Legacy Circle

Your Name

Address

City, State & Zip Code

Email

Phone

- I would like to learn more about The Keeler Legacy Circle and how to include Keeler Tavern Museum & History Center in my will or estate plan. Please contact me using the information provided above.
- I would like to indicate my Confidential Statement of Intent to contribute to The Keeler Legacy Circle through a bequest. Although this form expresses my gift intent, I understand that I may modify or revoke it, and that it is not a legal obligation.
- I have named Keeler Tavern Museum & History Center as a beneficiary in one or more:
- Will
 - Life Insurance Policy
 - Trust
 - 401(k)
 - IRA
 - Other (please specify) _____

Please enroll me in The Keeler Legacy Circle

- I may be named in any published lists of Legacy Circle members, including in the annual report.
- I prefer to remain anonymous.

Signature

Date

Please mail this form to Keeler Tavern Museum & History Center at 152 Main Street, Ridgefield, CT 06877.

You can also learn more and enroll in the Keeler Legacy Circle by visiting our website at www.keelertavernmuseum.org/support. **Thank you!**



The Keeler Legacy Circle

Keeler Tavern  Museum
and History Center

152 Main Street, Ridgefield, Connecticut 06877
Phone: 203.438.5485
Email: info@keelertavernmuseum.org

www.keelertavernmuseum.org/support

Keeler Tavern  Museum
and History Center



What is The Keeler Legacy Circle?

The Keeler Legacy Circle supports donors who would like to contribute to KTM&HC's long-term financial security through a bequest. Legacy membership represents an investment in, and a stewardship of, our museum.

Members of The Keeler Legacy Circle help advance our mission of preservation and education, supporting initiatives like:

- **Physical campus integration and wayfinding:** transforming our site into an accessible, cohesive experience for all visitors
- **Innovative educational programming:** connecting local lives and events, past and present, to a larger American experience in virtual and in-person formats
- **Reinterpretation:** developing more inclusive, interactive ways to tell our site-specific stories
- **Repair and maintenance:** preserving our five historic buildings, the grounds of our beautiful campus, and our robust collections and archives

Members receive special recognition on signage on KTM&HC's property, in our annual report, and on our website.

Please consider joining The Keeler Legacy Circle, which will help us continue to advance our mission for generations to come.

How can I join The Keeler Legacy Circle?

There are numerous ways to make a legacy gift. A legacy gift can be of any size and is non-binding if your situation changes. You retain control of your assets during your lifetime. Naming KTM&HC as a beneficiary of an IRA or 401k, a bank or brokerage account, an annuity, a life insurance policy or of non-401k retirement plan assets is the easiest means to make the gift and a heartfelt way to make a lasting impact. As a nonprofit organization, KTM&HC is eligible to receive the full amount of your charitable gift even if given from an IRA.

Alternatively, you could make a gift through your estate plan by including the gift in your will or living trust, stating that a specific asset, certain dollar amount, or percentage of your estate will pass to us after your lifetime. Your gift may be in the form of cash, stock, real estate, or tangible personal property for which you or your estate may be able to receive a charitable income tax deduction and reduce or avoid capital gains taxes.

Important Information

If you wish to join The Keeler Legacy Circle by including KTM&HC in your will or estate plan, the organization should be named as follows:

Keeler Tavern Preservation Society, Inc. (DBA Keeler Tavern Museum & History Center), a nonprofit corporation organized and existing under the laws of the State of Connecticut with a principle business address of:

152 Main Street, Ridgefield, CT 06877

Tax identification number: 06-6076244

Date of incorporation: August 17, 1965

The Keeler Legacy Circle uses charitable gifts to support our mission-driven work of education and preservation unless otherwise specified by the donor. If you would like your gift to be used for a specific purpose, please contact us to be sure your wishes can be met.

The Keeler Legacy Circle cannot render legal or tax advice. Please consult your estate planning advisor if you need advice in making a charitable gift.



“I joined The Keeler Legacy Circle because I wanted to give back to an organization that aligns with my values, an organization that serves my community and helps connect past and present through its mission-driven commitment to education and preservation.” Joel Third

Contact our Executive Director at 203-438-5485, ext. 11 if you would like more information and/or to discuss options for participation.