

PLANNED GIVING

Dr. Kennedy

LEGACY CIRCLE

OF THE BOWERS MUSEUM

KENNEDY LEGACY CIRCLE
OF THE
BOWERS MUSEUM
CONTINUES TO PROVIDE
THE WORLD'S FINEST ARTS AND CULTURES
TO CURRENT AND FUTURE GENERATIONS.

A large, elegant, handwritten signature in grey ink that reads "Dr. Kennedy". The signature is written in a cursive style with a long, sweeping tail on the final letter.

JOIN THE LEGACY CIRCLE TODAY

The Kennedy Legacy Circle recognizes and honors those who have included the Bowers Museum in their estate plans with a future gift through a bequest, life insurance, or trust arrangement; or have made an outright gift to the Bowers Museum Endowment Fund.

WELCOME TO THE BOWERS MUSEUM



Over the past 75 years, the Bowers Museum has experienced tremendous growth and hopes to continue to serve the Southern California community as the largest museum for many years to come. In October of 1992, the Bowers Museum reopened its doors to a crowd of over 17,000 people and shortly thereafter received its accreditation from the American Alliance of Museums, which it has since maintained. We have taken the facility from an 11,000 square foot historic building to the 100,000 square foot facility that we enjoy today. Since this highly successful reopening, the museum has presented over 60 major exhibitions from all over the world, opened six permanent galleries, and watched its membership grow to 8,000 members. Our Kidseum opened in 1994 and hosts thousands of students in its amazing art classes each year, plus its after school program is critical to the needs and safety of many families in the surrounding community.

On February 18, 2007, the Bowers Museum opened the new Dorothy and Donald Kennedy Wing which added 30,000-square-feet and increased its total exhibition space to help serve even more visitors. It features two new galleries: the East West Bank Gallery and Anderson-Hsu-Tu Gallery, in addition to the 300-seat Norma Kershaw Auditorium, the John M. Lee Court for events of up to 500 people, the Sharon D. Thompson Foyer, the S.L. and Betty Huang Courtyard, and more to meet the needs of a thriving community and audience.

The Bowers has grown at a remarkable pace and needs to begin focusing on sustainability in the more distant future. We have partnered with the Orange County Community Foundation, and with the assistance of the James Irvine Foundation, have launched the Kennedy Legacy Circle of the Bowers Museum to encourage our supporters to think of the Bowers and our importance to the Southern California community. Your donation to the Museum, in any one of many possible forms, can help us plan for the future. This program is designed to provide a vehicle for friends of the museum to remember the Bowers in their planned giving, and at the same time provide tax benefits to the donor. We need your support in our efforts to continue to provide the world's finest arts and cultures for future generations. Please don't hesitate to contact my office at 714-567-3601 if I can answer any of your questions.

Sincerely,

Peter C. Keller, Ph.D. President

PLANNED GIFTS AND THEIR BENEFITS

Planned giving is a way for you to integrate your personal, financial and estate planning goals by making lifetime or testamentary charitable gifts. Here are some common types of planned gifts.

BEQUESTS AND WILLS

A bequest is a gift made through your will or trust. A bequest is the simplest type of planned gift for you to make and one of the easiest to implement.

Goals and Benefits

You may desire to support charity but are unable to make gifts during your lifetime. You can maintain control of your assets during your lifetime, and then make a gift to charity at your death.

LIFE ESTATE RESERVED

You give your property to the Bowers Museum but retain the right to use the property during your life.

Goals and Benefits

You want to remain living in your home and desire a current income tax deduction.

CHARITABLE GIFT ANNUITY (CGA)

You make a gift of cash or property to us in exchange for our promise to pay you fixed income (with rates based on your age) for the rest of your life.

Goals and Benefits

You want to make a gift to the Bowers Museum and receive fixed income for the future. This plan works well with your gift of cash or appreciated stock that is providing little or no income. Avoid capital gains tax on the sale of your appreciated property and enjoy the benefit of tax savings from a charitable deduction.

This information is not intended as tax, legal or financial advice. Gift results may vary, consult your personal financial advisor for information specific to your situation. Some types of planned gifts require the services of Orange County Community Foundation.

CHARITABLE REMAINDER TRUST (CRT)

You transfer your cash or property to fund a trust that makes payments for your lifetime or a number of years and then passes what remains to the Bowers Museum.

Goals and Benefits

You own appreciated property that produces little or no income and would like to sell without paying capital gains tax. Enjoy a regular income for life or a term of years and receive the benefit of tax savings from a charitable deduction.

GIFTS OF LIFE INSURANCE

The gift of life insurance can be made by simply naming us as the beneficiary of your policy. Your life insurance proceeds will help further our good work and your estate will benefit from an estate tax charitable deduction based on the value of the proceeds paid. Making a donation through a paid-up life insurance policy is an excellent way to give a large gift—larger than you ever thought possible.

Goals and Benefits

You can receive a charitable income tax deduction by gifting the whole policy to the Bowers Museum while avoiding federal income and estate taxes as well. The death benefit of a life insurance policy would pass to the Bowers Museum and not be subject to any probate or estate administrative costs.

CHARITABLE LEAD TRUST (CLT)

You transfer your cash or property to a trust that makes payments to the Bowers Museum for a number of years and then passes the trust property to your family with no additional tax.

Goals and Benefits

You want to give cash or property to your family in the future without paying a lot of gift estate tax.

RETIREMENT ASSETS

Distributions from retirement plans, such as pension plans, IRAs and 401(k) plans are typically taxed as ordinary income to your named beneficiaries. They may be ideal assets to contribute to our organization, which is tax-exempt. You can name the Bowers Museum as a primary or contingent beneficiary.

Goals and Benefits

If you are looking for ways to save on estate tax, your retirement assets actually make a better gift to charity. This is because a charitable organization like ours can receive the entire asset tax-free and make use of it to further our mission.



GIVE NOW TO SUPPORT OUR FUTURE

A special message from Bowers Trustee and Legacy Co-Chair Lynda Thomas



The Kennedy Legacy Circle has been established by the Bowers Museum to recognize planned gifts that will continue to support the mission of the museum for many, many years to come. We are eager to help educate our members, donors and the public on how to help secure the growth and development of education and exhibition programs at the Bowers Museum while still providing for their loved ones.

As a member of the Kennedy Legacy Circle, I believe in the mission of the Bowers Museum to “enrich lives through the world’s finest arts and cultures.” The Bowers is happy to recognize individuals who make a charitable gift through planned giving of a bequest, charitable gift annuity, charitable trust, will, estate or endowment. A single call to my investment company and I received a new Beneficiary Designation form for my IRA. I added the Bowers Museum as a beneficiary, signed and mailed the form. Very straight forward and rewarding.

This is your opportunity to make a difference in our community and leave a legacy. I hope you will join me and consider becoming a founding member of the Kennedy Legacy Circle of the Bowers Museum.

Dr Kennedy
LEGACY CIRCLE

WHY WE GIVE TO THE BOWERS MUSEUM



LEGACY FOUNDER DONALD KENNEDY

Don Kennedy truly left this world a better place. His impact on Orange County, Chapman University, the Bowers Museum, and everyone who was fortunate enough to call him a friend was immeasurable. He served on the Bowers Board of Governors from 1996-2012. During his tenure, Don attracted no fewer than ten new Board members to join our team, spearheaded a 30,000 square foot Capital Campaign expansion that was completed on time, on budget, and was paid for when completed.

That wing was immediately named the Donald and Dorothy Kennedy Wing of the Bowers Museum. He then contributed over \$2,000,000 to a program endowment. It goes without saying that his impact on the Bowers was huge, he will be missed, and his legacy lives on at the museum.

LEGACY MEMBER BOB PARRETT

For many years, Bob Parrett, a retired engineer who traveled the world with his wife, Minette, worked almost every day in the Museum's Gallery Store. Even though Bob was in his 80's, his enthusiasm in selling our tribal art was infectious. He and Minette were part of our family and even hosted the store staff Holiday party each December. Recently, both Bob and then Minette passed away with no children. Imagine the Bowers' surprise when we learned that they remembered the Bowers in their Will with a \$100,000 donation.

LEGACY MEMBER DOUGLAS BURCH

For over seventy-five years the Bowers Museum has played a role in the cultural vitality of the Orange County Community. For nearly forty years the Docent Guild has played a role in the education of Orange County students. The museum has been funding the Guild expenses for all of those years. More and more arts institutions are dependent upon individual giving to sustain their programs. It is for these reasons that Doug established the Docent Guild Endowment Fund to perpetuate Guild and Museum programs for future generations.

LEGACY MEMBER MARY MUTH



Mary Muth recently passed away just short of her 100th birthday and with her passing, she has left an enduring legacy at the Bowers Museum.

Serving on our Board of Governors for over 20 years, Mary was always there when we needed help the most, from her \$250,000 gift to underwrite our new technology program, to naming our library, historic wing, and even buying the Museum a new van when the cast off from the City finally didn't run anymore. Mary was always encouraging us to be our very best and will be fondly remembered for a very long time.

Yes!

I WANT TO LEAVE MY LEGACY
AT THE BOWERS

Dr Kennedy
LEGACY CIRCLE



BOWERS MUSEUM

EVERY LEGACY GIFT COUNTS!

This is your opportunity to provide the world's finest arts and cultures to future generations.

Name _____

Address _____

City _____ State _____ Zip _____

Name recognition as you would like it to appear _____

I would like to make a gift to the Kennedy Legacy Circle of the Bowers Museum.

Please send me more information about:

- BEQUESTS AND WILLS LIFE INSURANCE CHARITABLE GIFT ANNUITY (CGA)
 LIFE ESTATE RESERVED RETIREMENT ASSETS CHARITABLE REMAINDER TRUST (CRT)
 CHARITABLE LEAD TRUST (CLT)

Members of the Charles and Ada Bowers Society have expressed their commitment to the Bowers Museum through a very special and important form of financial support.

To learn how your Kennedy Legacy Circle gift may qualify you to be a member of the Charles and Ada Bowers Society, please call our Planned Giving department at 714.567.3639 or email plannedgiving@bowers.org

Bowers Museum is a 501 (c)(3) non-profit organization, Tax I.D. #330106161

Please detach and return in envelope provided.

THANK YOU FOR YOUR SUPPORT!

Kennedy
LEGACY CIRCLE

OF THE BOWERS MUSEUM

Dr Kennedy
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OF THE BOWERS MUSEUM

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This information is not intended as tax, legal or financial advice. Gift results may vary,
consult your personal financial advisor for information specific to your situation.