

rosenwald society



museum of
science+industry
chicago

Your power to inspire future generations is limitless...

**“I love it here.
I want MSI to be here forever.”**

–Sasha, 7th grade student

It all started with a single transformational gift...

The Museum of Science and Industry was launched in 1933 by philanthropist and business leader Julius Rosenwald. He hoped to create a place that made science accessible, interactive and fun for his children, and for all of Chicago.

Julius Rosenwald's legacy has touched the lives of more than 175 million people. We carry on his vision by working to inspire the inventive genius in everyone—through dynamic, interactive exhibits, learning labs, after-school education programs and a commitment to motivating our children to achieve their full potential in the fields of science, technology, medicine and engineering.

We invite you to ensure the legacy continues by leaving a gift of your own.



“MSI is dedicated to sharing science knowledge with everyone. By leaving a planned gift, I’m ensuring the Museum will be inspiring my great-grandchildren and all the young scientists in Chicago for years to come.”

**—John A. Canning, Jr., Chairman,
Madison Dearborn Partners, L.L.C.**



What is a planned gift?

A planned gift is a charitable contribution that is arranged in the present and allocated at a future date. The most common planned gifts are donated through a will or trust.

Planned gifts touch all aspects of the visitor experience; exhibit development and care, education in all its forms, modernizing our 1893 home and supporting all other operational needs. Your legacy can inspire future scientists and innovators who walk through the Museum's doors.

What are the benefits of giving a planned gift?

Support the Museum Beyond Your Lifetime

Your planned gift allows you to support the programs and exhibits you love for generations to come. Whether you treasure the U-505 exhibit or our Live Science programming, your gift will make sure they continue to inspire visitors.

Fulfill Your Philanthropic Goals

Gift planning allows you to fulfill your philanthropic goals with options for lifetime payments and tax benefits. You can choose the type of gift that provides the best options for you and your family, while at the same time ensuring that dynamic science remains accessible for families throughout Chicago.

A Gift Costs Nothing During Your Lifetime

By naming the Museum of Science and Industry in your will or living trust, you can provide for MSI's future as part of your larger estate planning.

Membership in the Museum's Rosenwald Society

The Museum is grateful for planned gift pledges and acknowledges you with permanent recognition, complimentary admission to the Museum, exclusive access to special events and exhibit previews and invitations to our annual Rosenwald Society Luncheon.



How do I leave a planned gift?

Leaving a Bequest

Including a charitable gift in your will, living trust or other estate plan is a powerful way to support the Museum's vision and leave a legacy with a Chicago icon. You may take the following sample language and ask your professional counsel to incorporate it into your estate plans.

SPECIFIC BEQUEST LANGUAGE

Museum of Science and Industry may be named as a beneficiary of a specific amount or percentage from your estate:

"I give and devise to the Museum of Science and Industry, located at 5700 S. Lake Shore Drive, Chicago, Illinois, the sum of \$_____ to be used for its general support (or for the support of a specific affiliate, fund or program)."

RESIDUAL BEQUEST LANGUAGE

Your gift may also be made after your estate expenses and specific bequests have been paid:

"I give and devise to Museum of Science and Industry, located in Chicago, Illinois, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific affiliate, fund or program)."

Giving Through Retirement Plans

There are many advantages to making charitable gifts through retirement planning, including maintaining complete control over your retirement assets while avoiding all estate and income taxes when the asset is transferred to the Museum of Science and Industry. The easiest way to use a retirement plan to make a gift to MSI is by designating the Museum as a beneficiary of a retirement fund, such as an IRA, 401(k) or 403(b). Simply request a change of beneficiary form. Deliver a completed form to your plan administrator and notify the Museum of Science and Industry.

Naming MSI as the Beneficiary of a Life Insurance Policy

By donating a paid-up life insurance policy you no longer need or naming MSI as a beneficiary on your policy, you can make a large gift at little or no cost to you. To make a gift of life insurance, contact your life insurance provider, request a beneficiary designation form from the insurer and include Museum of Science and Industry as the beneficiary of your policy.

Setting Up a Charitable Gift Annuity or Other Life-Income Gift

A charitable gift annuity is a gift made to our organization that can provide you with a secure source of fixed payments for life based on your age. Creating a charitable remainder trust, provides you with income for life and the remainder is passed on to the Museum of Science and Industry. A Charitable Lead Trust provides income to the Museum for a specific term of years, and the remainder is retained for your heirs. Please consult your financial advisor to set up life-income gifts and notify the Museum of Science and Industry.

Note: Descriptions of gift planning options are for illustrative purposes only. Please consult your financial advisor to determine whether a specific gift plan is right for you.

Rosenwald Society benefits

The Rosenwald Society honors individuals who have made one or more of the following commitments:

- Included the Museum of Science and Industry as part of a bequest in their estate plans
- Named the Museum of Science and Industry as a beneficiary of retirement assets or life insurance
- Established a charitable life-income gift to benefit the Museum of Science and Industry

Your planned gift strengthens and sustains the Museum's mission to inspire the creative genius in everyone. We offer the following benefits to individuals who have left a planned gift for the Museum of Science and Industry:

- Permanent Recognition
- Complimentary Admission to the Museum
- Special Invitations to exclusive Museum Events such as MSI Insider events, Rosenwald Society luncheons and exclusive lectures and tours
- Complimentary indoor parking
- Concierge service including a designated liaison and ticket reservation service

Questions?

We would love to speak with you about your legacy plans and answer any questions you might have. Please give us a call at **(773) 947-6146** or send us an email at giving@msichicago.org.

Have you already left MSI a planned gift?

We would be grateful for the opportunity to acknowledge your gift (or respect your wishes to remain anonymous) and welcome you to the Rosenwald Society. Please fill out the Enrollment Form and return it to the Individual Giving Team at the Museum of Science and Industry.

Email: giving@msichicago.org

Mail: Museum of Science and Industry
Attn: Rosenwald Society
5700 S. Lake Shore Drive
Chicago, Illinois 60637



ROSENWALD SOCIETY ENROLLMENT FORM

As an expression of my/our commitment to the mission of the Museum of Science and Industry, located at 5700 S. Lake Shore Drive, Chicago, Illinois, I/we have made provisions to support the Museum through my/our estate plan through:

- A bequest in my/our will or trust
- A gift naming the Museum as beneficiary of insurance policy
- A gift naming the Museum as beneficiary of IRA or qualified retirement plan
- A life-income gift through a charitable gift annuity or charitable remainder trust
- Other _____

Amount (optional) _____

- I/we wish to keep our gift anonymous.
- I/we give permission to list my/our names as Rosenwald Society members with the understanding that the amount and type of arrangement will remain confidential.

Donor Name(s)

Name(s) as you want to be recognized (middle initial, maiden name, Jr., etc.).

Address

City State Zip Code Phone

Email Address

Signature 1 Date

Signature 2 (if applicable) Date

Please list the name of a professional advisor or family member we may contact with follow-up questions.

Name Phone Email

This document is used to ensure proper stewardship of your philanthropic gift. We are grateful for the opportunity to honor your legacy and for your support of the Museum of Science and Industry.

**Your support makes
our future limitless...**





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