



THE MILLER'S SOCIETY AT ANSELMA:

BUILDING A SUSTAINABLE ORGANIZATION

In 2018, the Board of Trustees of the Mill at Anselma Preservation and Educational Trust, Inc. established a society to recognize those generous individuals who included the Mill in their estate plans—either through a planned-gift agreement or charitable bequest. In honor of the historic legacy of the many millers operating the Mill throughout its history – beginning with Lightfoot, ending with Collins, and now encompassing a new group of volunteer millers - this society is known as **The Miller's Society**.

The support of thoughtful friends of the Mill who memorialize their commitment to the Mill with their bequests and planned gifts is a significant factor in preserving the preservation and educational mission of the organization. Therefore, the Board of Trustees has directed that these planned-gift and bequest donors receive special recognition as members of The Miller's Society. This will include a special event specifically catered to members and a lapel pin.

Membership in The Miller's Society is available to anyone who has established and provided documentation for the following (*see descriptions on next page for details*):

- a bequest or other arrangement through their will;
- a retirement asset transfer, such as from an IRA, 401k, 403b, etc.;
- a charitable gift annuity;
- an insurance policy where ownership was transferred to the Mill, and the Mill was named owner and beneficiary; or
- a gift using another planned-gift strategy.

Sustainable non-profits, including many historic mills in Pennsylvania and elsewhere, have endowments and investments whose interest provides the minimum operating funds needed to keep the organization running even in the absence of fundraising operations. As the 2008 financial crisis demonstrated, fundraising can be truncated by circumstance.

With this in mind, the Trust will direct all Miller's Society funding into building the organizational endowment.

For more than 250 years the Mill at Anselma has fed Chester County, Philadelphia, and beyond. Standing strong today, it represents years of technological and cultural change, as well as the importance of entrepreneurs in a free market. Today, as in days past, this National Historic Landmark remains the cornerstone of the Mill at Anselma's Trust. Through **The Miller's Society**, the Board of Trustees recognizes those donors who provide the cornerstone of financial security on which the Mill can rely for another 250 years.

HOW CAN YOU GET STARTED? Use the attached Estate Intention Form and/or email the Executive Director at executive.director@anselmamill.org or call 610-827-1900.



THE MILLER'S SOCIETY AT ANSELMA:

OPTIONS FOR PLANNED GIVING

In addition to gifts of cash, stocks, and other securities, giving options on the previous broadly include:

BEQUESTS

- This is the most popular form of planned giving. You can include in your will: *"I will give ___% of \$___"* OR *"the remainder of my estate to the Mill at Anselma Preservation and Educational Trust Inc. Endowment Fund at the Chester County Community Foundation, EIN 23-2773822."*

RETIREMENT ASSETS

- A gift from your IRA, 401k, 403b, pension, or other tax deferred plan is generally tax-free if gifted directly to the charity (and generally taxable when gifted to heirs).
- For a tax free transfer, designate on your Retirement Plan Beneficiary Designation Form *"The Mill at Anselma Preservation and Educational Trust Inc. Endowment Fund at the Chester County Community Foundation, EIN 23-2773822."*

CHARITABLE GIFT ANNUITIES

- "Have your cake and eat it too" option
- Transfer cash or marketable securities to *The Mill at Anselma Endowment Fund at the Chester County Community Foundation* and benefit from a current income tax deduction.
- Community Foundation pays the donor or other named beneficiary a specified amount during their lifetime.
- Remaining principal goes to the *The Mill at Anselma Endowment Fund at the Chester County Community Foundation.*

LIFE INSURANCE

- A substantial gift via a modest contribution of insurance premiums.
- Donor names *The Mill at Anselma Endowment Fund at the Chester County Community Foundation* as a beneficiary or contingent beneficiary of an existing policy; or donates a fully paid policy.

ESTATE INTENTION FORM



The Miller's Society recognizes those individuals who have included the Mill at Anselma Preservation and Educational Trust, Inc. in their estate plan and provided documentation of the part of their estate plan that benefits the Mill. In order that we may include you in the Society, value your future gift for any strategic planning or campaign purposes, and properly acknowledge your commitment, we ask that you please provide the following information about your future gift through your will or other planned gift arrangement. Please note that this is a confidential record.

I/We understand that making this commitment may be an incentive for others to do the same, and I/We

- prefer to remain anonymous
- am/are happy to be listed as a member(s) of The Miller's Society.

I/We would like my/our name(s) to appear in publications as follows (if both you and your spouse/partner have provided for the Mill, please indicate how both names should appear): _____

I/We am/are providing for the future of the Mill through: (circle all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Revocable Lifetime Trust |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Life Insurance |
| <input type="checkbox"/> Bequest in Will | <input type="checkbox"/> Life Estate |
| <input type="checkbox"/> Retirement Plan (IRA, 401K, etc.) | <input type="checkbox"/> Charitable Lead Trust |
| <input type="checkbox"/> Other (please specify) _____ | |

Please check **ONE** of the next 3 options:

- I/We am/are currently in the process of working with my/our advisor/attorney to draft my/our Will(s) or planned gift(s) agreement(s).
- I/We have enclosed a copy of the Will(s) provisions(s) and/or planned gift(s) agreement(s) pertaining to the Mill.
- The Mill already has a copy of my/our Will(s) provisions(s) and/or planned gift(s) agreement(s) to the Mill.

Please check **ANY** of the next three that apply.

- I/We have enclosed a copy of the executed designation form (IRA, 401K, life insurance, etc.) naming the Mill as owner or beneficiary.
- My/Our Will(s) or agreement(s), was/were established and signed. My/Our Will(s) or agreement(s) provide(s) that _____% shall be distributed to the Mill. As of today's date, the estimated value of this/these provision(s) is/are approximately \$ _____ .

- or expectancy amount range – please circle one

- | | |
|--|--|
| <input type="checkbox"/> \$1,000 - \$49,999 | <input type="checkbox"/> \$250,000 - \$499,999 |
| <input type="checkbox"/> \$50,000 - \$99,999 | <input type="checkbox"/> \$500,000 - \$999,999 |
| <input type="checkbox"/> \$100,000 - \$249,999 | <input type="checkbox"/> \$1,000,000 + |

- My/Our Will(s) or planned gift agreement(s) provide(s) that a specific monetary amount shall be bequeathed or distributed to the Mill. The current value is: \$ _____

I understand that I am not making a legal or binding commitment upon my estate by submitting this Estate Intention Form. Further, the Mill should understand that the size of my future gift might be significantly different from the amount estimated here for the purposes of valuation in any campaign. If, for any reason in the future, the Mill is no longer included in my estate plan, I will notify the Mill so that the Mill can update the record, and remove me/us from The Miller's Society membership list.

Name _____ Birth Date _____

Address _____

_____ Preferred Email _____

Preferred Phone _____ Class Year _____

Spouse/Partner _____ Birth Date _____

Address _____

_____ Preferred Email _____

Preferred Phone _____ Class Year _____

Date _____

Date _____

Miller's Society Member 1 Signature

Miller's Society Member 2 Signature

Please mail or email the completed form to:

Executive Director
The Mill at Anselma Preservation and Educational Trust, Inc.
1730 Conestoga Road
Chester Springs, PA 19425
610-827-1900
Executive.director@AnselmaMill.org