



Bequest Information

200 N. Main Street
Bloomington, IL 61701

*Our legal name is: **McLean County Historical Society**
Our Address: **200 N. Main Street, Bloomington, IL 61701**
Our IRS Tax identification number: **37-1414038**
We are a non-profit 501(c)(3) organization*

A charitable bequest is one of the easiest and most flexible ways you can leave a gift to the McLean County Museum of History (MCMH) that will make a lasting impact. With the help of an attorney, you can include language in your will or trust specifying a gift to be made to family, friends and MCMH as part of your estate plan. Legacy gifts have historic significance for MCMH and have been instrumental in building an endowment to support the preservation and sharing of the rich history of McLean County residents.

SAMPLE LANGUAGE FOR YOUR BEQUEST

This language is for the illustration of various forms of bequests only. Always consult your professional advisor when making or revising your will.

1. **RESIDUARY BEQUEST** - *(Residue) is a term to describe the portion of your estate that remains after all debts, expenses and specific bequests to others have first been fulfilled.*

Example: “All the rest, residue and remainder of my estate for federal tax purposes I give to the **McLean County Historical Society**, located in Bloomington, Illinois, Tax ID 37-1414038, for its general purposes.”

2. **SPECIFIC BEQUEST** – *Is a term to indicate a specific dollar amount or a specific percentage of your estate that you would like to leave to the McLean County Historical Society.*

Example: “I give to the **McLean County Historical Society**, located in Bloomington, Illinois, Tax ID 37-1414038, _____, (percent of your estate, specific dollar amount, securities, or property) for its general purposes.”

DONATIONS OF LIFE INSURANCE, IRAs OR OTHER PENSION/RETIREMENT PLANS

A will typically does not dispose of assets such as life insurance and pension plans, which usually pass by “beneficiary designation.” A beneficiary designation is a contract between you and your insurance company or pension plan administrator to transfer the asset at your death to the person(s) or institution(s) you have designated (usually in the initial paperwork you completed to establish the asset). **To designate the McLean County Historical Society as the beneficiary or contingent beneficiary of such an asset, you should contact your plan administrator and request a “change of beneficiary” form, which you can complete and return to them.**

*Note: Use Tax ID 37-1414038 in lieu of social security number for the **McLean County Historical Society**.*

For more information about leaving a bequest to the McLean County Museum of History, please contact Norris Porter, Director of Development

(309) 827-0428 | development@mchistory.org