

## HOW THE MERCER MUSEUM AND FONTHILL CASTLE CAN ASSIST YOU

Our staff is available to assist you in achieving your estate planning and charitable giving objectives. For more information, call our Development Office at 215-345-0210, ext. 129. Or fill out the enclosed form and mail to: Development Office, Mercer Museum & Fonthill Castle, 84 S. Pine St., Doylestown, PA 18901.



The Mercer Museum and Fonthill were created by Henry Mercer to preserve treasures he rescued from destruction. Housed in his home and museum are artifacts worthy of preservation and distinction, that teach and inspire our generation, as well as generations to come.

*“Both venues [Mercer and Fonthill Museum] are unique not only in America but the world. The Mercer Museum is a five story concrete castle with so many agriculture tools and pieces of machinery that they are literally hanging from the ceilings! And the concrete Fonthill mansion, a few blocks away, is a massive labyrinth of Moravian tile-covered rooms, floors, ceilings and walls unlike any place else you will ever visit.”*

*—Wilmington Examiner August 11, 2010*

As guardians of these special landmarks, we take great pride in advancing Henry Mercer’s vision to share his unmatched collection with all who value our past and its role in placing us where we are today. In 2011, the Mercer Museum completed an expansion project to build a larger exhibit gallery so all of his collection – much of it still unseen by the public – and wonderful educational exhibits from the outside can be shared with admirers of history.

Please consider including the Mercer Museum and Fonthill Castle in your estate plans. With your commitment, the Bucks County Historical Society can continue to provide our community and the rest of the world with the learning experience of a lifetime.

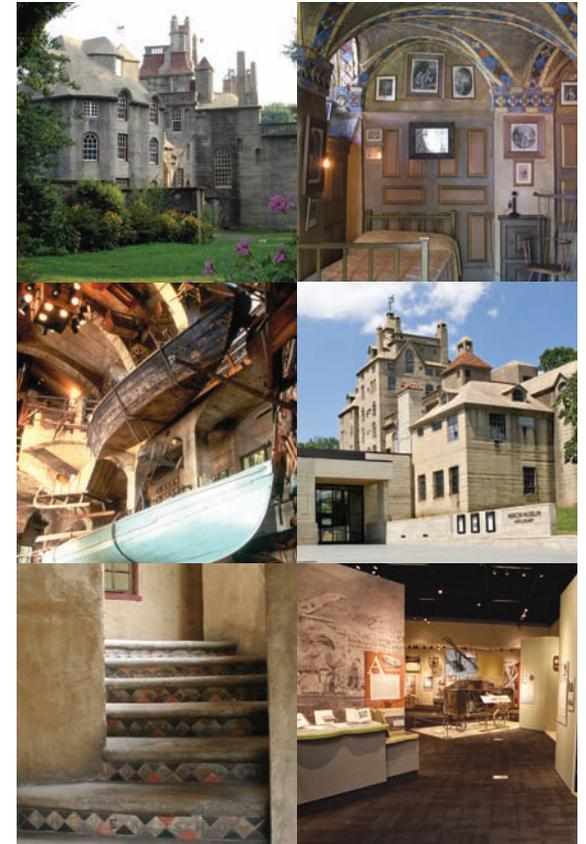


84 South Pine Street, Doylestown, PA 18901  
[www.mercermuseum.org](http://www.mercermuseum.org) • 215-345-0210

The BCHS is a non-profit, 501(c)(3) charitable organization. A copy of the BCHS official registration and financial information may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.

## THE MERCER MUSEUM AND FONTHILL CASTLE

*operated by the Bucks County Historical Society*



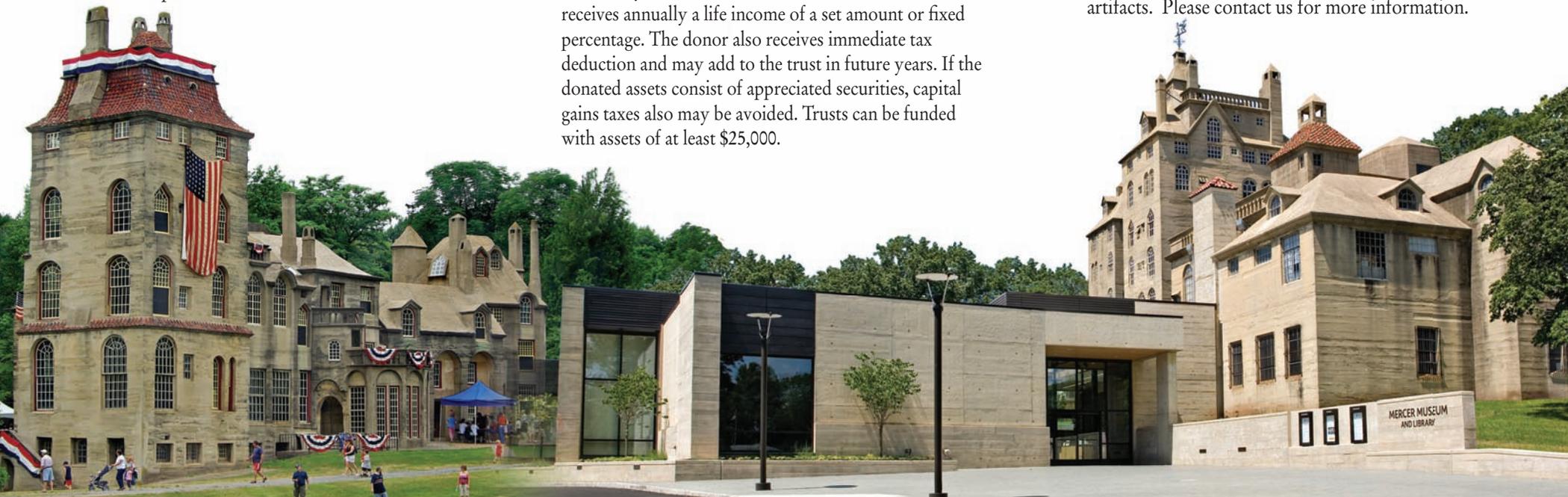
## PLUS ULTRA SOCIETY



**H**enry Mercer's accomplishments through his buildings and collections are inspiration to us all. Through your bequest or other planned gift, you can ensure that the Mercer Museum and Library, and Fonthill Castle will continue to inspire visitors of all ages for generations to come.

The Plus Ultra Society was established in 1998 to acknowledge the valuable contributions of those who include the Bucks County Historical Society in their estate plans. "Plus Ultra" is Latin meaning "more beyond", and it became Henry Mercer's own motto during his lifetime. By including the Mercer Museum and Fonthill Castle in your estate plans, you are ensuring that the Mercer Museum and Fonthill Castle will be able to build on the strength of its collections and educational programs.

The Mercer Museum offers many planned giving opportunities all of which can be tailored to meet your specific financial and estate-planning needs. Some examples are listed.



## WAYS TO LEAVE A LEGACY AT THE MERCER MUSEUM AND FONTHILL CASTLE

### BEQUEST

A gift of cash, securities, or real property made upon the donor's death through provisions in a will or living trust. The amount of the gift is exempt from estate taxes.

### RETIREMENT PLANS

Designation of Mercer Museum and Fonthill Castle as the beneficiary of a donor's qualified pension plan, IRA, Keogh, or employee stock option plans. Allows the donor use of these assets during his or her lifetime, while providing the donor with the opportunity to make a large future gift and reducing his or her taxable estate.

### CHARITABLE REMAINDER TRUST

An irrevocable transfer of assets to a trust naming Mercer Museum and Fonthill Castle as the ultimate beneficiary or one of several beneficiaries. The donor receives annually a life income of a set amount or fixed percentage. The donor also receives immediate tax deduction and may add to the trust in future years. If the donated assets consist of appreciated securities, capital gains taxes also may be avoided. Trusts can be funded with assets of at least \$25,000.

### CHARITABLE LEAD TRUST

An income producing asset placed in a trust, the income of which is contributed to Mercer Museum and Fonthill Castle for a designated period, after which the asset is returned to the donor or beneficiary.

### GIFTS OF LIFE INSURANCE

Designation of Mercer Museum and Fonthill Castle as owner and beneficiary. For a new policy, this allows the donor to classify premium payments as charitable tax-deductible contributions. For existing policies, a donor can generally deduct the entire replacement value of the policy plus any subsequent premium payments. If the policy is not fully paid-up, its approximate cash value plus future premium payments are usually fully deductible.

### GIFTS TO THE COLLECTION

Charitable bequests may also include historical artifacts. Please contact us for more information.