



PLUS ULTRA SOCIETY MEMBERSHIP FORM

Inspired by the Latin motto, *Plus Ultra*, or “more beyond,” Henry Mercer made his home, museum, and collections a gift to our community. The ***Plus Ultra Society*** is comprised of those who have included Mercer Museum & Fonthill Castle, operated by the Bucks County Historical Society (BCHS), in their estate plans.

I/WE HAVE INCLUDED BUCKS COUNTY HISTORICAL SOCIETY IN MY/OUR WILL:

Name _____ Date of Birth ____/____/____

Name _____ Date of Birth ____/____/____

Mailing Address

Cell Phone _____

Email Address _____

☐ A specific bequest of \$ _____

☐ A percentage bequest of % _____ Estimated value \$ _____

☐ Other

Relevant Notes:

I/WE HAVE MADE ARRANGEMENTS FOR THE FOLLOWING:

☐ A life insurance policy

Death benefit \$_____ Current cash surrender value \$_____

BCHS is ☐ Primary beneficiary or ☐ Secondary beneficiary

☐ A Qualified Retirement Plan (IRS, 401k, 403b)

BCHS interest % _____ Current market value of plan \$ _____

BCHS is the ☐ Primary beneficiary or ☐ Secondary beneficiary

☐ Charitable Gift Annuity

☐ Charitable IRA Rollover Contribution/Required Minimum Distribution

☐ Other (describe): _____

PURPOSE

My/our future gift is:

☐ Unrestricted or ☐ Restricted for the following purpose:

AUTHORIZATION FOR USE OF NAME

☐ I/we authorize BCHS to include my/our name(s) on the membership list of ***Plus Ultra Society Members*** in publications and on public recognition displays. I/we understand that this authorization is limited to the use of my/our name(s) only, and that the type and amount of my/our gift will remain confidential. Please list my/our names exactly as follows:

☐ I/we prefer to remain an anonymous member of the ***Plus Ultra Society***.

Signature

Date

Signature

Date

WOULD YOU LIKE TO SHARE YOUR BCHS STORY?

Please email us at development@mercermuseum.org if you would like to share why you are leaving a legacy gift to Bucks County Historical Society and would be interested in being featured in future communications via print/electronic media. Your generosity may inspire others!

Please contact President & CEO Kyle McKoy at kmckoy@mercermuseum.org should you require any further information.

Thank you!

All information on this form has been provided for planning purposes only. The Bucks County Historical Society acknowledges that the donor is not bound by any statements herein, and may choose to add, subtract or revoke these arrangements at any time, at the donor's sole discretion.