

About The Sons of the Revolution

The Sons of the Revolution in the State of California, Inc. was founded in Los Angeles on May 8, 1893 and became duly incorporated under the laws of California on May 15, 1893. The Society is tax exempt under Section 501(c)(3) of the Internal Revenue Code, and gifts and bequests to it are tax deductible for U. S. Income tax purposes.

About the American Heritage Library and Museum

Through our 118-year old Library and Museum, we provide the public a unique collection of books, manuscripts and photographs for education and research. School-aged children, students and adults enjoy programs and view rotating exhibits to gain insight and understanding of patriotic traditions and significant historical events relating to the founding and heritage of our country, and events since, free of charge.



Address Correction Requested

Sons of the Revolution American Heritage Library
600 South Central Avenue
Glendale, California 91204



Remembering the American Heritage Library and Museum in Your Will or Trust



*Sons of the Revolution
American Heritage Library and Museum*

Sons of the Revolution
American Heritage Library and Museum
600 South Central Avenue
Glendale, California 91204

Phone: (818) 240-1775
E-mail: webmaster@srcalifornia.com
Internet: www.SRcalifornia.com



Gifts through Your Will or Trust

You can support the Sons of the Revolution and its Library's future by making a bequest to it as part of your estate plan.

What if you already have a will or trust?

You can amend your will or trust and make a gift without rewriting the entire document. Your attorney can prepare a simple document, called a codicil, which adds a new bequest to the Sons of the Revolution while reaffirming the other terms of your will. Similarly, an attorney can prepare an amendment to a revocable trust to add The Sons of the Revolution as a beneficiary.

Your Gift Will Preserve a Record of Our Heritage

A bequest is one of the simplest ways to support 1) The Sons of the Revolution in the State of California, and 2) its American Heritage Library and Museum. Your gift will ensure that we can continue our critical work to protect the heritage that exists in our Library.

How it works

You provide a future gift to The Sons of the Revolution by including a bequest provision in your will or revocable trust.

- The bequest is *not paid until death*, so it does not impact you during your lifetime.
- It is *revocable* – you can modify the gift at any time, and
- It is *private* – If you have a will, it is not filed or made public until after your death.

Benefits

- Your assets remain in your control during your lifetime.
- You receive estate tax charitable deduction.
- There is no upper limit on the estate tax deductions that can be taken for charitable bequests.
- You lessen the burden of taxes on your family.
- You know that your gift will benefit The Sons of the Revolution in the State of California / American Heritage Library and Museum tomorrow just as you intend it to today.

Let us know if you have chosen to leave a bequest to The Sons of the Revolution in the State of California.

You have a Number of Options

- Your bequest can be unrestricted and simply to The Sons of the Revolution in the State of California ("I bequeath the sum of Ten Thousand [\$10,000] dollars").
- The American Heritage Library and Museum receives benefit from all unrestricted charitable gifts to the Sons of the Revolution.
- Your bequest can be a specific percentage of your entire estate ("I bequeath Ten [10%] Percent of my estate").
- Your bequest can be a percentage of the balance remaining in your estate after taxes, expenses and specific bequests have been paid — what's known as the residue ("I bequeath Ten [10%] Percent of the residue of my estate").
- You can designate the use of your gift for a specific function in the American Heritage Library and Museum. If you have a specific purpose in mind, please contact us at (818) 240-1775 to ensure that we can meet your wishes.

Is a bequest deductible?

Yes. The Sons of the Revolution in the State of California is a 501(c)(3) charity, and as such your bequest is fully deductible for federal estate tax purposes. There is no limit on the deduction your estate can claim. In addition, the gift is usually exempt from state inheritance taxes.

What is the difference between a will and a trust?

- A *will* is your instruction manual to survivors about how you want your property distributed. It is a revocable, private document that only takes affect after your death.
- A revocable *trust* is an entity that holds assets during your lifetime, then transfers ownership of them — or benefit from them — upon your death.

There is no difference between a will and a trust in terms of how they make charitable transfers. In some states the probate and distribution process is simpler with a revocable trust. Your advisor can guide you in choosing which vehicle will work best for you.

How to name The Sons of the Revolution in the State of California in your will or trust:

—It is important to schedule a meeting with your attorney and add the correct legal language to your document when updating your will or trust. —

If you wish to name The Sons of the Revolution in the State of California in your will or estate plan, we should be named as:

The Sons of the Revolution in the State of California, a nonprofit corporation, organized and existing under the laws of the State of California, with principal business address 600 South Central Avenue, Glendale, California 91204.