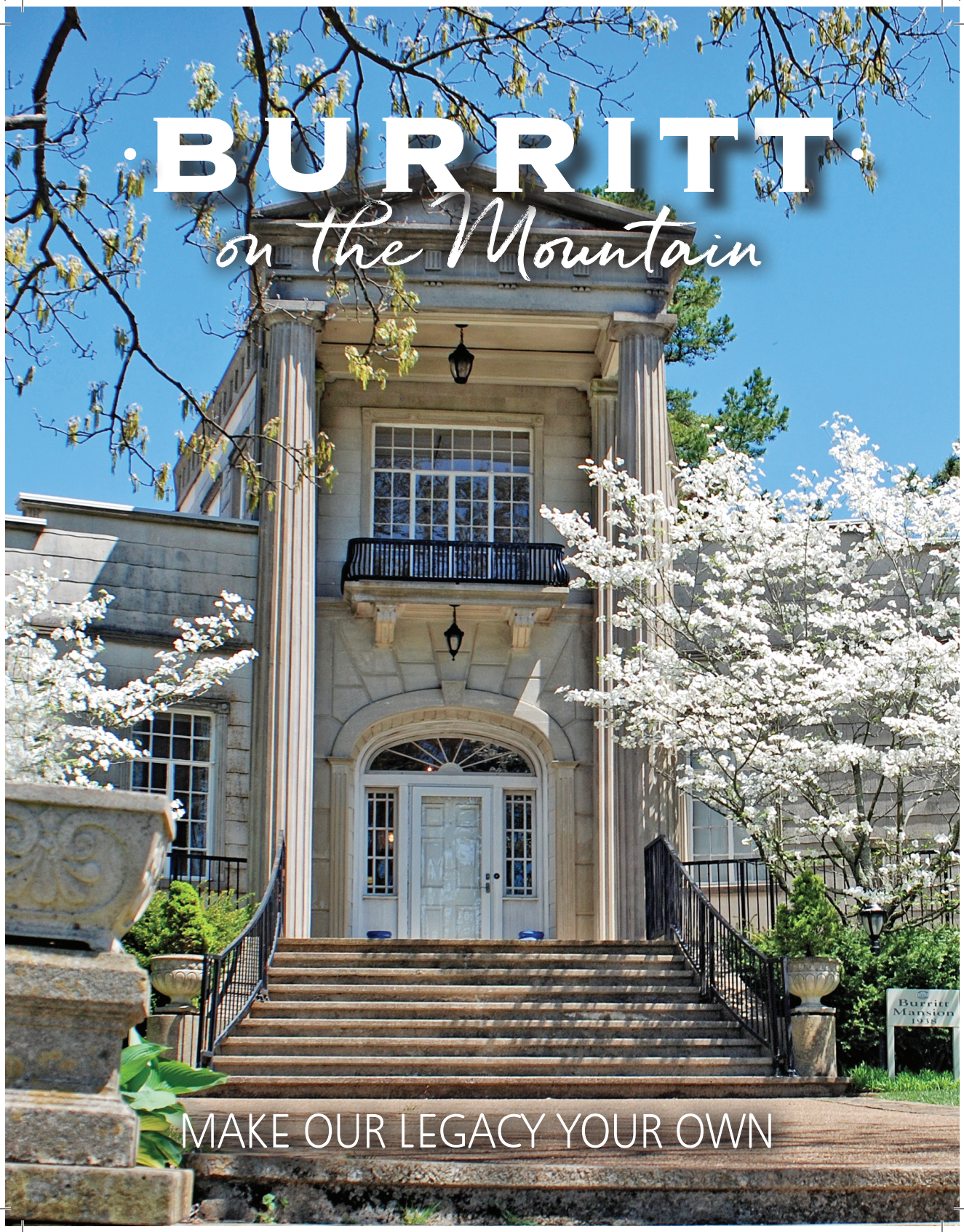
BURRITT
on the Mountain
Burritt Mansion 1938
MAKE OUR LEGACY YOUR OWN

OUR LEGACY IS YOUR LEGACY

What does Burritt on the Mountain mean to you and your family? Do you think of summer evenings with friends enjoying a City Lights and Stars Concert or a cocktail at The View? Maybe it's introducing your grandchildren to a simpler way of life in the Historic Park during Kris Kringle's Candlelight Christmas? Could it be dancing with your daughter or son at their wedding in Baron Bluff? Or perhaps, it's taking time for yourself to learn a new skill at a Folk Life workshop?

For over sixty years, Burritt on the Mountain has meant so much to so many. We would like to invite you to partner with us to help provide long-term support for Burritt while also receiving financial benefits. In this brochure, you will find descriptions of some of the many types of planned gifts options available for sustaining your legacy. We encourage you to discuss with your financial advisor, estate attorney, and/or accountant what options might work best for you, your family, and your estate.

Like a quilt with diverse pieces sewn together, Burritt on the Mountain as a whole is an amazing design. Every part of Burritt comes with a history, a story and with your gift, a future.

Dr. Burritt shared his home to become a place of quiet reflection, a place to sit and drink in the view from above the city, and freely breathe the fresh air. Now, with the addition of The View, we can extend his hospitality, expand his vision, and enjoy a magnificent space. A space which allows us to see and enjoy the future of Huntsville while reflecting the peace and harmony of the mountain.

RECREATION

With Burritt's festivals, play areas and cuddly critters in the barnyard, families can enjoy safe, affordable, recreation. Hikers appreciate the miles of trails that connect to the Land Trust and Monte Sano State Park. Add to that, beautiful venues for weddings, meetings and concerts. From the manicured lawns for viewing the City Lights and Stars concerts to the breathtaking vista of The View, Burritt has gone beyond just children's fare to offer adults some exciting recreation of their own!

BUT WE ARE NOT DONE.

"I love Burritt because it has been such a special place and such a safe place for our family."

EDUCATION

The focus of all that we do is about, and for, education. From camps to Homeschool classes our instructors create the finest programs in Huntsville! Our children's summer events are always fun, innovative and completely original. Whimsical Woods, Time Travel Adventure and Gold Mountain are some of the summer activities entirely designed by our team. In addition, our docents in the mansion and interpreters in the Historic Park are trained to provide factual information with the ability to put your experience into context with modern life. Your gifts help provide much needed funds for these programs to be enjoyed well into the future.

ART

They say that "Art is in the eye of the beholder," well behold Burritt on the Mountain! In our bourgeoning Burritt Folk School traditional folk art is thriving. Our current monthly classes preserve these skills by passing them along to new would-be artists and we have more wonderful plans for the Burritt Folk School on the horizon! The line-ups for City Lights and Stars reflect a variety of genres and two of the wings in the Burritt Mansion are used for rotating exhibits. The Arts are thriving at Burritt.

PRESERVATION

Preservation means a variety of things here. Whether it is the preservation of a way of life or the preservation of a home that could tell a thousand stories, we honor the past and want to preserve it for future generations. Dr. Burritt's mansion, six historic homes, an Old Country Church, a barn and outbuildings, each one as important to the fabric of Burritt on the Mountain as the next.

Gifts THROUGH YOUR ESTATE

BEQUEST

You can provide now for a future gift to Burritt on the Mountain by including a bequest provision in your will or revocable trust. Burritt receives the gift, and applies it to the purpose(s) you specify.

Benefits

- Your assets remain in your control during your lifetime.
- You can modify your bequest if your circumstances change.
- You can direct your bequest to a particular purpose (be sure to check with Burritt to make sure your gift can be used as intended).
- There is no upper limit on the estate tax deductions that can be taken for charitable bequests.
- You know that your gift will benefit Burritt tomorrow just as you intend it to today.

CHARITABLE GIFT ANNUITIES

You transfer cash or securities to Burritt on the Mountain. Burritt pays you, or up to two annuitants you name, a lifetime annuity. The principal passes to Burritt when the contract ends.

Benefits

- You receive an immediate income tax deduction for a portion of your gift.
- Your lifetime annuity is backed by a reserve and the full assets of Burritt on the Mountain.
- Your annuity payments are treated as part ordinary income, part capital gains income (15%), and part tax-free income.
- You have the satisfaction of making a significant gift that benefits you now and Burritt later.

"Burritt is a piece of my heart as I've watched it gradually morph into one of Huntsville's most beautiful venues. It's a place where dreams have come true with the Baron Bluff and now The View. I've spent many hours working with wonderfully committed volunteers."

LIFE INSURANCE

You can provide now for a future gift to Burritt on the Mountain by naming us owner and beneficiary of a policy insuring your life. You make annual gifts to Burritt in the amount of our premium payments. When the policy matures the proceeds are paid to Burritt on the Mountain, and we apply them to the program you have designated.

Benefits

- You can make a significant gift from income instead of capital.
- Your gifts offsetting our premium payments are fully deductible.
- You build our future financial strength.

RETIREMENT ASSETS

You name Burritt on the Mountain as the beneficiary of your IRA, 401(k) or other qualified plan. After your lifetime, the residue of your plan passes to the Burritt.

Benefits

- You can escape both income AND estate taxes levied on the residue left in your retirement account by leaving it to Burritt on the Mountain
- Give the most-taxed asset in your estate to Burritt, and leave more favorably taxed property to your heirs.
- You can continue to take withdrawals during your lifetime.
- You can change the beneficiary if your circumstances change.

Mission Statement

Our mission is to enhance lives and build community through educational, artistic, and recreational experiences while preserving our heritage,land and historic structures.

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The Burritt Museum Foundation is a separately incorporated 501(c)3 tax exempt organization that solicits, receives, invests, maintains and distributes gifts for the benefit and growth of Burritt on the Mountain. The assets of the Foundation are invested to generate both a steady and reliable income stream for Burritt and to provide appreciation in the real value of these assets, ensuring long term support for future generations.

If you are interested in learning more about the Foundation – or if you have already included the Foundation in your estate plans – please contact us at burrittmuseumfoundation@gmail.com. If you would like to donate to Burritt on the Mountain please contact Caroline Buncick at caroline.buncick@huntsvilleal.gov or 256.512.5570.

The material presented in this publication is not offered as legal or tax advice. You are urged to seek the advice of your tax advisor, attorney and/or financial planner to make certain a contemplated gift fits your overall circumstances and planning.