

• BURRITT •

on the Mountain

The Legacy Society

ESTABLISH A LASTING LEGACY

What does Burritt on the Mountain mean to you?

Summer evenings with friends enjoying a City Lights concert

Wednesday evenings at Cocktails at The View

Memories with kids or grandkids experiencing a simpler way of life

Stepping back in time to a magical Candlelight Christmas

Dancing with your daughter or son at their wedding in Baron Bluff

Learning a new skill at a Folk School workshop.

*These are the experiences that your legacy gift to
Burritt on the Mountain can ensure for generations to come.*

Burritt on the Mountain was born of a legacy.

Willed to the City of Huntsville in 1955 by Dr. William Henry Burritt, the 162-acre property was designated to be a park and museum, Huntsville's first public museum. From those humble beginnings,

Burritt has grown to be a vital part of the community, impacting the lives of tens of thousands of visitors each year.

WE ALL LONG TO LEAVE A LEGACY.

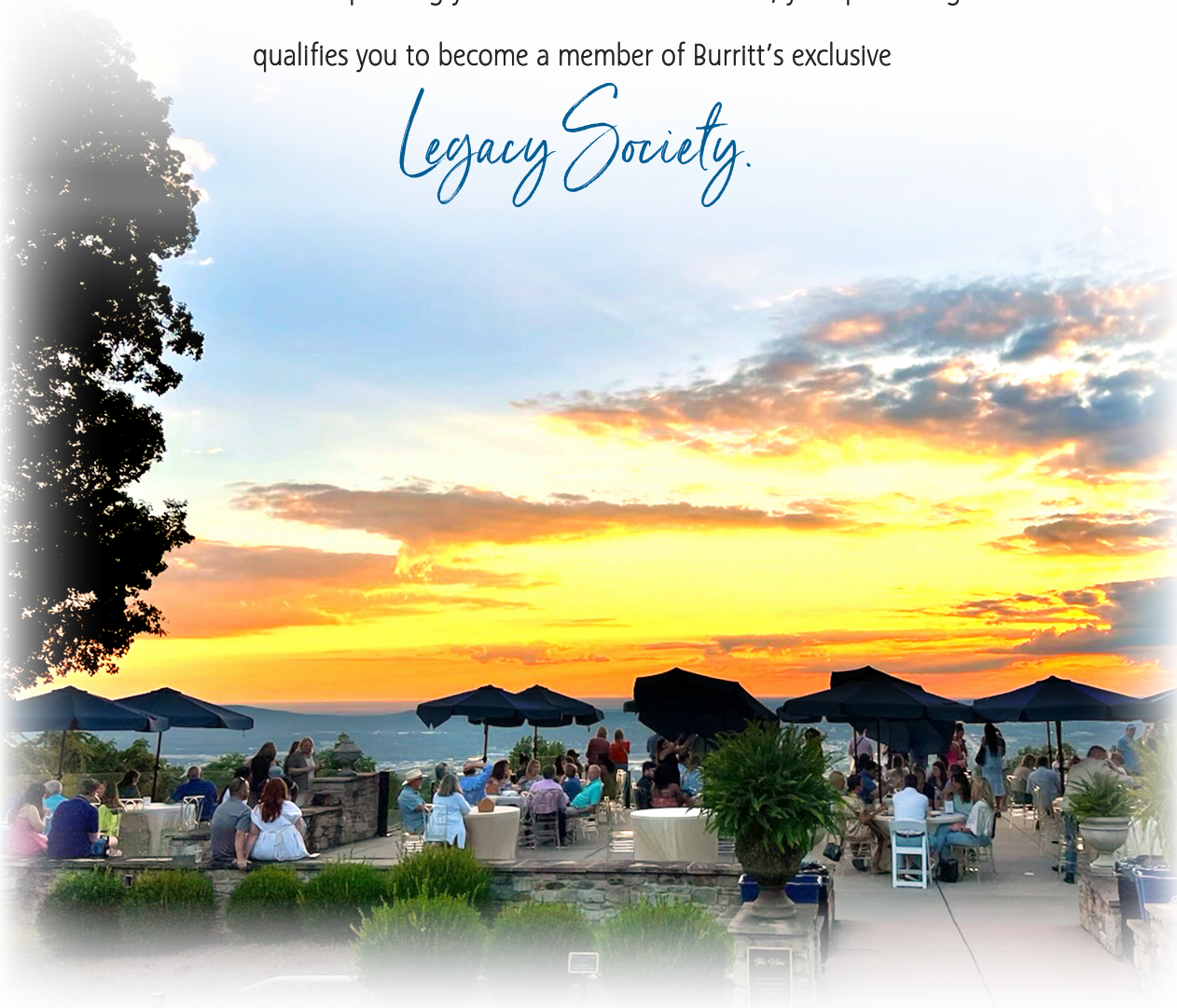
What will your Legacy be?

A planned gift to Burritt will help to continue the long-ago established legacy of Huntsville's own Dr. Burritt, while at the same time cementing your own legacy.

You can be remembered for your generosity and commitment to Burritt's purpose for generations to come. With legacy giving, you can stipulate how your gift will be used and rest assured that your legacy will be preserved in the way that you want.

In addition to expressing your commitment to Burritt, your planned gift qualifies you to become a member of Burritt's exclusive

Legacy Society.



GIFTS THROUGH YOUR ESTATE

Legacy Society members can achieve name recognition through named funds (\$50,000 gift or higher) or on buildings and grounds as stipulated in endowments. In addition, names are optionally listed on a plaque in Josie's Welcome Center. Please consult with your financial advisor and attorney to see which of the following methods of giving best suits your situation.

TWO WAYS TO *Give*

There are two separate entities that receive legacy gifts at Burrirt. Donations to either entity can be restricted or unrestricted, named or unnamed, and designated for your preferred area of interest.

BURRITT MUSEUM FOUNDATION

The Burrirt Museum Foundation is a 501(c)3 tax-exempt organization that solicits, receives, invests, maintains, and distributes gifts for the benefit and growth of Burrirt on the Mountain. The assets of the Foundation are invested to generate both a steady and reliable income stream for Burrirt and to provide appreciation in the real value of these assets. The Foundation ensures long-term support for Burrirt operations and for the preservation and maintenance of buildings and grounds.

Options to consider include:

- Burrirt Endowment Fund (Unrestricted)
- Balch Endowment Fund (for House, Church, or School)
- Burrirt Forest and Trail Fund
- Baron Bluff Preservation & Protection Fund
- Burrirt Preservation & Protection Fund
- Your named fund!

BURRITT MUSEUM ASSOCIATION

The Burrirt Museum Association (BMA) is a separately incorporated 501(c)3 tax-exempt, nonprofit organization. This entity is a charitable and educational corporation that exists primarily as the fund-raising arm of Burrirt. BMA is a more general operating entity than the Foundation.

Most of Burrirt's programmatic revenue and expense activities are incurred by the BMA.

Some examples of focus for your donation include:

- Capital Projects
- Scholarships
- Historic Park
- Special Events
- Buildings & Grounds
- Director's Discretion
- Museum Collections
- Mansion

Regardless of your choice, your legacy gift to Burrirt ensures the financial security of this jewel on the mountain.

To make your gift or to learn more about planned giving,
contact burrirtmuseumfoundation@gmail.com or call the Development Director at 256.512.5570

OPTIONS TO CONSIDER

RETIREMENT ASSETS

You name Burrirtt on the Mountain as the beneficiary of your IRA, 401(k) or other qualified plan. After your lifetime, the remaining funds pass to Burrirtt.

Benefits

- You can escape both income AND estate taxes levied on the residue left in your retirement account by leaving it to Burrirtt on the Mountain
- Give the most-taxed asset in your estate to Burrirtt, 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.



LIFE INSURANCE

You can provide now for a future gift to Burrirtt on the Mountain by naming Burrirtt owner and beneficiary of a policy insuring your life.

You make annual gifts to Burrirtt in the amount of our premium payments.

When the policy matures the proceeds are paid to Burrirtt on the Mountain, and applied to the program you have designated.

Benefits

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

BEQUEST

You can provide now for a future gift to Burrirtt on the Mountain by including a bequest provision in your will or revocable trust. Burrirtt 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 Burrirtt 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 Burrirtt tomorrow just as you intend it to today.



CHARITABLE GIFT ANNUITIES

You transfer cash or securities to Burrirtt on the Mountain. Burrirtt pays you, or up to two annuitants you name, a lifetime annuity. The principal passes to Burrirtt 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 Burrirtt 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 Burrirtt later.

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

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.



ART

They say that "Art is in the eye of the beholder," well behold Burritt on the Mountain! In our burgeoning 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.





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!

“ I love Burritt because it has been such a special place and such a safe place for our family. ”
Kristina West



EDUCATION

The focus of all we do is about 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.

For more than 65 years,
Burritt has offered a place of quiet reflection,
a place to sit and enjoy the view of Huntsville,
a place to take a deep breath and revel in the serenity of nature.
This is a place of hospitality; a space which allows you
to experience first-hand the simplicity of a by-gone era
while surrounded by the peace and harmony of the mountain.

Leslie Ecklund, CEO



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RETURN SERVICES REQUESTED



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Seek the advice of your tax advisor, attorney and/or financial planner to make certain that a
contemplated gift fits your overall circumstances and planning.