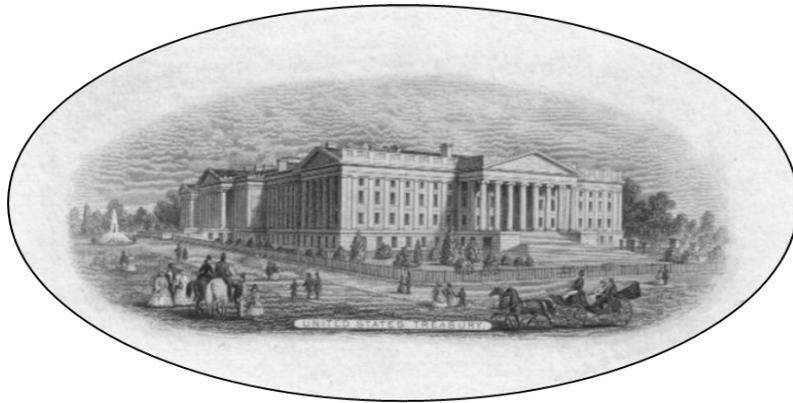


Restore the Past; Preserve the Present; Protect the Future



*An Opportunity to Create Your Own Legacy,
through a Bequest to the Treasury Historical Association
to Preserve the U.S. Treasury Building*

RESTORE THE PAST; PRESERVE THE PRESENT; PROTECT THE FUTURE

TREASURY HISTORICAL ASSOCIATION

Preserving the History of the U.S. Treasury



Dear Members, Donors, and Friends of the Treasury Historical Association (THA):

This is the year that THA celebrates 225 years of the Department of Treasury's service to the nation. The historic Treasury Building, at 15th Street and Pennsylvania Avenue, NW, neighboring the White House, is an integral part of Treasury's history. The Department has been located here for 214 years, starting when the first Treasury Office was built on the site of the South wing of today's Treasury Building, at the time that the Federal Government relocated from Philadelphia to the new capital city of Washington, DC.

The construction of the current Treasury Building spanned 33 years, from 1836 to 1869. The four wings were completed incrementally, with the East wing in 1842, the South in 1860, the West in 1864, and the North in 1869. This magnificent Greek Revival building has stood the test of time and is a symbol of the lasting nature of our nation and its financial systems.

This National Historic Landmark deserves respect, and THA is committed to the goal of assuring that it is preserved for future generations. One way for you to help honor the past and assure the realization of this goal is to make a bequest to THA's Planned Giving Program. Such a bequest will not only aid in preserving the historic Treasury Building, but it will also create a personal legacy for your family and friends, demonstrating your commitment to preserving this monumental building for future generations. Enclosed is THA's Planned Giving Brochure that describes options for making a bequest.

Can THA count on you to help in this monumental task of restoring and preserving the Treasury Building?

Preserve a Vital Part of American History and Create Your Legacy

The Treasury Historical Association (THA) has a Goal – that the historic Treasury Building will be restored and preserved for generations to come. You can be a part of making this Goal become a reality, and you can demonstrate to your heirs your commitment to preserving a vital part of American history. Please consider what your contribution might do to help THA in its accomplishment of this Goal.

For over 40 years, THA has assisted in the preservation of the historic Treasury Building and has provided public education about the vital role the U.S. Department of the Treasury has played in our nation's history for more than two centuries. To continue and to enhance its efforts, THA established a new way for THA members and other interested individuals to contribute through estate planning.

A bequest to THA is an effective way to assist in preserving the National Historic Landmark Treasury Building, in enhancing Treasury's collection of items of historic value, and in creating public awareness of Treasury's role in the history of America – and a bequest may result in a current tax deduction for the donor.

What is THA's Role?

THA's fundamental purpose is to assist the Treasury Department in accomplishing its mission to restore the historic Treasury Building. Established in 1973, THA is a non-profit [501(c)(3)] organization that does not have any paid employees. All programs are conducted by its volunteers. THA's mission is to preserve the history of the second oldest Cabinet Department and its National Historic Landmark Treasury Building. Through education, THA fosters an appreciation for the rich history of the Treasury Department and its bureaus. THA sponsors a noontime lecture program and publishes books of historical interest about the Treasury Department and the Treasury Building. Finally, THA contributes meaningfully to the Department with donations of items of historic significance to Treasury's history.

In the past 25 years, THA has donated to the Treasury Department over \$600,000 in cash and in-kind gifts. Funds received from members and other donors have been used by THA to purchase portraits of Abraham Lincoln and Secretaries Alexander Dallas, Salmon Chase, William Fessenden, and W. Michael Blumenthal. Also, THA has provided period-appropriate replica chandeliers for the Treasury Building's corridors and funded *trompe l'oeil* decorative paint research and conservation of portraits and sculptures. Additionally, THA has provided almost \$250,000 to fund the restoration of the 23-karat gilding in the ceiling of the Cash Room and the monumental triple-skylight dome of the Treasury Building's West wing.

Further, Treasury Building restoration projects that THA has contributed towards were: seed money to fund the first of four phases of restoration of the marble and railing of the West wing spiral stair-cases; funding for restoration of the North wing lobby and period-appropriate lighting for the West wing lobby, in-kind gift of contractor services to restore the gilding of eagles on the building's North wing corridor columns, and funding to restore ceiling stencil design in the Diplomatic Reception Room.

To further its Goal, THA recognizes that education must be a vital aspect of its activities. In this regard, it has a regular lecture program, featuring speakers such as many former Secretaries of the Treasury, historians, and authors on historical Treasury-related issues. Also, its newsletters and its website provide educational information. THA recently published two significant educational history books, following extensive research by their authors: *Fortress of Finance: The United States Treasury Building* and its companion volume *Birthplace of Bureaus: The United States Treasury Department*. An educational documentary film has also been commissioned, focusing on the architecture of the Treasury Building and the historic events that occurred within its walls. These resources will be invaluable to historians and researchers now and in the future.



Why Preserve the Treasury Building?

Like our Republic, the Treasury Building has stood the test of time and served Americans well. The historic Treasury Building is the third oldest continuously-occupied Federal office building in the city of Washington, DC, surpassed only by a small section of the Capitol Building and the center portion of the White House.

Many fundamental government agencies, both remaining in and since departed from the Treasury Department, were housed for a period of time in the Treasury Building; these include what is now the Office of Management and Budget, the General Accounting Office (today's Government Accountability Office), and the General Services Administration, as well as today's Census Bureau, Food and Drug Administration, Drug Enforcement Administration, Public Health Service, and many others.

Ravaged by fires, war, and time, the Treasury Building has been in continuous, dire need of repairs and renovation, as well as historic preservation. Funding to maintain the grandeur of the building over most of the past 170 years has been a financial struggle. To preserve this vital part of our nation's history, THA is asking its members and other Americans to consider a bequest to restore and preserve the Treasury Building for future generations and to further education programs and public awareness of the Treasury Department's service to the nation.

For further information on the history of the Treasury Building and the bureaus of the Treasury Department, you may refer to the two books mentioned earlier.

Why give to THA?

Generally, Federal buildings are controlled by, and are the responsibility of, the General Services Administration. The Treasury Building is one of the few exceptions, totally under the control of the Treasury Department. THA has been collaborating with the Treasury Department and providing funding for many restoration projects throughout the Treasury Building. It has also continued to help the Department in preserving and enhancing its priceless collection of historic art, furniture, artifacts, and documents for 40 years. And, it has established a vibrant program to continue assisting the Department in its role as steward of the Treasury Building.

With each donor's bequest, he or she will be a partner in the preservation of Treasury's and America's history. Since THA is categorized under Section 501(c)(3) of the Internal Revenue Code, a bequest or gift to THA is tax-deductible to the extent permitted by law.



Planned Giving and Your Legacy

By establishing its Planned Giving Program, THA provides an opportunity for individuals to make gifts to THA at the time of the donor's passing. Thus, donors support THA's Goal and support a Treasury Building "Living Legacy of America." Donors also create a personal legacy, demonstrating to family and friends their commitment to preserve America's past.

To assist in preserving the historic Treasury Building, please consider making a bequest to THA. Bequests allow you to integrate your charitable giving goals with your estate and financial planning needs. If you wish to provide a bequest to help fulfill THA's Goal, please complete the enclosed form and return it to THA. Upon THA's agreement to accept the gift, your name will be added to THA's Fortress of Finance Preservation Circle, a special donor category reserved solely for individuals who make a bequest. You will then be provided a special Fortress of Finance Preservation Circle certificate that acknowledges your role in advancing THA's Goal.

If the bequest amount or value is \$5,000 or more at the time of THA's receipt of your bequest, your name will be placed on a special plaque reserved for individuals who have made a significant contribution to the mission of THA; this plaque will be on permanent display in the Treasury Building.

Types of Bequests

Your bequest can consist of cash, wills, and living trusts, proceeds of life insurance policies, retirement accounts, or annuities, plus works of art, historic documents, or images that would be of interest to the Treasury Department. A planned gift to THA is an action taken during your lifetime that benefits THA and, ultimately, the Treasury Department after your passing or the passing of your last named beneficiary.

Bequests by Will or Living Trust

Bequests by will or living trust are the simplest and most popular form of planned giving. You may designate a remainder of your estate after gifts to your loved ones have been fulfilled, a percentage of your estate, or a specific amount.

Life Insurance

Contributions of a life insurance policy, whether in whole or in part, can become a substantial gift to THA. You may take one of two approaches: (1) name the Treasury Historical Association as the beneficiary of the policy or (2) gift the policy today by making the Treasury Historical Association the sole owner and the beneficiary of the policy. Under the second alternative, the cash surrender value of a policy at the time of the gift is tax-deductible. And, if you continue paying the premiums, they are deductible as charitable contributions. To designate THA, please contact the administrator of the life insurance policy and use their form to record the gift and then furnish a copy to THA.

Individual Retirement Account (IRA) Beneficiary (Conventional, SEP-IRAs or Roths)

You have undoubtedly worked very hard to save for retirement, probably using a wonderful tool called the Individual Retirement Account (IRA), which comes in several varieties, including Roth IRAs. These tax-advantaged financial instruments allow individuals to build nice nest eggs but, with traditional IRAs and SEP-IRAs, taxes have to be paid when distributions are made from the IRA. If the income is not really necessary to maintain your quality of living, you might wish to consider making a bequest of an IRA to the Treasury Historical Association during your lifetime. Or, if your heirs will be substantially provided for by other provisions of your estate plan, you might consider naming the Treasury Historical Association as the beneficiary of your IRA.

A bequest of a retirement account provides a future gift at the time of the passing of the IRA owner. Your heirs will benefit inasmuch as they will incur no income tax liability on the amount donated. To designate THA as a beneficiary, you will need to use the forms provided by the IRA administrator and furnish a copy of the completed form to THA.

Annuities

If, during your life, you obtained an insurance company-issued annuity, depending on the annuity policy, you may be able to donate all or part of the remaining value of the annuity to THA. The administrator of the insurance policy will need to make that determination. Designation of the Treasury Historical Association as the beneficiary must be done on the insurance company's form and a copy of the form should be furnished to THA.

Items Designated for Treasury's Historical Collection

THA will accept gifts in-kind (physical items) of historic interest to the Treasury Department to be placed in its permanent collection. Items could include works of art, period furniture, photographs, historic papers, etc. Before designating such an item or items, please check with THA to determine if the item(s) are acceptable for the permanent Treasury Department collection. Not all items may be appropriate or they might duplicate items already in the collection.

Please contact THA when you consider a bequest of this nature. THA will advise you in advance which in-kind gifts THA is able to accept for ultimate donation to Treasury. THA may request authentication documents for some items.

Financial Instruments

At this time, THA is not normally able to accept stocks, bonds, and certain other financial instruments. If you wish to donate financial instruments of this nature, please contact THA to determine if the item can be accepted.

Other Potential Gifts

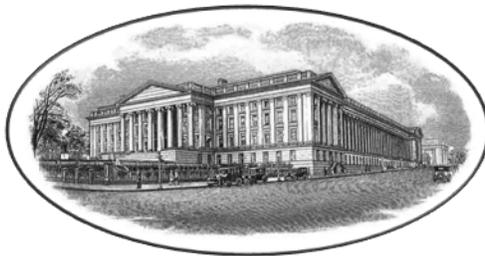
THA is not normally able to accept physical items that are not of historic interest to the Treasury Department. If you wish to donate such items, please contact THA to determine if the item can be accepted.

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As you consider designating a bequest to THA, please contact your personal attorney and financial advisor. Your legal and tax professionals will be able to advise you in detail of the particular benefits specific to your situation, as well as the processes required, and will help you in planning your bequest to THA. A form for designating your gift is enclosed with this brochure. You will note that THA is requesting contact information.

To discuss your intended bequest to THA or to present any questions you might have, please contact THA by telephoning (202) 298-0550 or by sending an email message to info@treasuryhistoricalassn.org.

THA will thank you for considering and making a bequest that will benefit its Goal. Upon receipt of the enclosed bequest form, THA will acknowledge your bequest and will provide specific guidance on the next steps. THA will determine the legal sufficiency of the documentation and, when appropriate, will provide documentation for tax-deduction purposes. As noted earlier, at the time of your notifying THA of your bequest and upon THA's agreement to accept it, your name will be included into THA's Fortress of Finance Preservation Circle and, if your bequest exceeds \$5,000, your name will be inscribed on a plaque in the Treasury Building at the time THA receives the financial or in-kind bequest.



**Treasury Historical Association
P.O. Box 28118
Washington, DC 20038-8118**

**Telephone: (202) 298-0550
Email: info@treasuryhistoricalassn.org**

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I/we confirm that I/we have taken steps to make a bequest or other planned gift to the Treasury Historical Association (THA). I/we understand that all information listed on this form will be kept in strict confidence.

Name(s): _____
 Address: _____
 City: _____ State: _____ ZIP: _____
 Phone(s): _____ Email: _____

I/We have made the following type(s) of planned gift(s) to THA:

- 1. Gift through Will or Living Trust:**
 - Bequest of specific property or amount (see reverse)
 - Bequest of residue of estate Bequest of percentage of estate _____%
 - Bequest of remainder of estate after other beneficiary distribution
- 2. Life Insurance Policy:** Policy No.: _____ Company: _____
 - A specified amount (complete item 6) A specified percentage _____%
 - Current value, and I (will)(will not) continue to pay the premiums.
 - Insurance company form (is)(is not) transmitted with this card.
- 3. Individual Retirement Account (Traditional, SEP-IRA, Roth):**
 - A specified amount (complete item 6) A specified percentage _____%
 - Financial institution's form (is)(is not) transmitted with this card.
- 4. Annuity:** A specified amount (complete item 6) A specified percentage _____%
 - Issuing institution's form (is)(is not) transmitted with this card.
- 5. In-Kind Gift(s) for Treasury's Historical Collection, as Described Below or on Attached List (please contact THA before listing any intended in-kind gift to determine if THA can accept):** _____
- 6. Estimated Total Value of Bequest or Other Planned Gift(s):** \$ _____ as of date _____.

Acknowledgment Preference: Please list my/our name(s) in THA's *Fortress of Finance Circle* and, if applicable upon receipt, on the engraved plaque in the Treasury Building in the following manner:

Note to Donors: THA will keep confidential the above gift information as well as any further details provided in subsequent communications as greater specifics are provided to THA. THA will use the information for planning purposes in order to project future gifts to the Treasury Department in furtherance of THA's mission of restoration and preservation of the Treasury Building and of education on history of this department. The only information that THA will release is the name of each donor enrolled in THA's *Fortress of Finance Circle* and, as applicable, on the donor plaque in the Treasury Building, unless the donor opts for anonymity.

Donor Signature(s): _____ **Date:** _____

Please submit this form to:
 Treasury Historical Association
 P.O. Box 28118
 Washington, DC 20038-8118

For information, contact THA at:
 Telephone: 202-298-0550
 E-mail: info@treasuryhistoricalassn.org



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