



THE PORTSMOUTH HISTORICAL SOCIETY

LEGACY CIRCLE



JOIN US IN BUILDING A LEGACY

Your planned gift ensures that the Historical Society can cultivate and enrich a greater understanding of Portsmouth histories. Together, we can create a legacy that will inspire future generations. Contact us today to get started.

YOUR LASTING LEGACY



Dear Friends,

For more than a century, Portsmouth Historical Society has preserved and shared the stories that define our city—its people, places, and moments that continue to shape who we are today. This work has always been made possible by individuals who believe deeply in the power of history to connect, inspire, and strengthen our community.

A planned gift to Portsmouth Historical Society is one of the most meaningful ways you can help secure our future. Your generosity provides long-term financial stability, ensuring that we can continue bringing Portsmouth's history to life for generations to come. Planned gifts also allow us to grow and care for our collections, create engaging exhibitions, and expand educational programs that reach learners of all ages across our community.

We are deeply grateful for those who choose to include Portsmouth Historical Society in their legacy plans. It is our privilege to recognize and honor your generosity in ways that reflect your wishes and ensure your commitment to this community is remembered and celebrated.

Thank you for considering a lasting investment in Portsmouth's past, present, and future.

Warmly,

A handwritten signature in black ink that reads "Emma".

Emma Stratton
Executive Director



WAYS TO GIVE

- Will or trust
- Charitable gift annuities
- Retirement plan assets
- Stock or appreciated assets
- Life insurance
- Real estate, art, and/or personal property



WHY YOU SHOULD MAKE A PLANNED GIFT

Easy

A bequest can be as simple as adding a short sentence to your will, such as: "I give \$10,000 to Portsmouth Historical Society."

Flexible

Wills and trusts can be updated at any time, allowing you to adjust your plans as life changes.

Meaningful and personal

You may direct your bequest to support a specific program or purpose at Portsmouth Historical Society that matters most to you.

Tax-smart

Bequests to qualified charitable organizations like Portsmouth Historical Society may provide important tax benefits to your estate.

BENEFITS FOR YOU

Tax-smart giving

Planned gifts may offer meaningful tax advantages, including potential income and estate tax benefits and the reduction or avoidance of capital gains taxes, helping preserve more for your loved ones.

Income for life

Some planned giving options can provide a reliable income stream during your lifetime.

Put assets to work

Planned gifts can allow you to shift assets into arrangements that may offer stronger long-term earning potential.

A lasting legacy

You can care for family and loved ones while also creating a legacy that reflects your values and supports the mission of the Portsmouth Historical Society.

Recognition, your way

We are honored to recognize planned giving donors through naming opportunities and special events, always guided by your preferences.





Planned Giving Donor Profile: JULIA PHELPS

After 40 years as an educator, I retired to promote clean water projects, educational opportunities for young girls, and the eradication Polio for Rotary International. A global pandemic slowed my travels and kept me closer to home. It was then that I decided to make a difference in my local community.

Beginning as a volunteer at the Portsmouth Historical Society. I welcomed visitors to our exhibits and answered questions about Portsmouth and all we have to offer on the seacoast. Soon I was serving on a committee and not long after that I was asked to take a seat as a Trustee and help with our fundraising efforts.

Making a bequest to Portsmouth Historical Society ensures that my husband and I will make a lasting difference at the historical society. We will impact children and families that we will never know. **Our gift allows us to express our commitment to the education of future generations.** It's our way of making sure that children know about their community and the families that lived here long before them.

Education has served as the foundation for everything we have attained in our lives and is why we care so much about the educational programs provided by Portsmouth Historical Society. The third-grade history lessons, the walking and cemetery tours, and the Plaque Program give opportunities for future generations to create their own connections to Portsmouth history.

We believe that our gift will be part of our legacy and we will have influence on the lives of many in Portsmouth for years to come.

How to Make a Planned Gift

- 1. Consult with Advisors:** Talk with your financial and legal advisors to find the best planned giving option for you.
- 2. Contact Us:** Reach out to our development office to discuss your intentions and receive assistance.
- 3. Document Your Gift:** Complete necessary documentation, such as beneficiary designations, wills, or trust agreements.
- 4. Notify Us:** Inform us of your gift so we can acknowledge and honor your generosity properly.



CONTACT US

Get in touch with our development team at
603.570.2492 or development@portsmouthhistory.org

