



Leave a legacy.  
Preserve the past.  
Inspire the future.

**Wisconsin Historical Foundation  
Murphy Legacy Circle Membership Enrollment Form**

In recognition of our strong confidence in the work of the Wisconsin Historical Society, we,  
\_\_\_\_\_, confirm that we have made  
a deferred gift to the Wisconsin Historical Foundation.

**We understand that all information listed on this form will be kept in strict confidence.**

Donor Name \_\_\_\_\_

Phone \_\_\_\_\_ Email Address \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Social Security # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Co-Donor Name \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Social Security # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

In an effort to help the Wisconsin Historical Society pursue its mission and also to encourage others to make similar gifts, we wish to enroll as members in the Robert B.L. Murphy Legacy Circle by confirming a deferred gift of:

\$ \_\_\_\_\_ (dollar amount) or \_\_\_\_\_% (portion of residuary estate)

to the Wisconsin Historical Foundation. When possible, please attach a copy of the portion of your will or other documents that include the Foundation as a beneficiary.

NOTICE TO DONOR: All information provided will be kept in the strictest confidence. We will use this information for planning purposes only to measure the level of our budgetary commitment to serving the needs of the Society. We understand that you may need to use estimates rather than exact figures.

**Purpose of deferred gift to the Wisconsin Historical Foundation:**

- ( ) Unrestricted to provide maximum flexibility for the Wisconsin Historical Society.
- ( ) Restricted for the following Society priority: \_\_\_\_\_  
\_\_\_\_\_

**Please enroll us as members of the Robert B.L. Murphy Legacy Circle with the opportunity to participate in the various special programs available to Robert B.L. Murphy Legacy Circle members.**

**We prefer to be listed in all publications in the following manner:**

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Signature \_\_\_\_\_ Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

*If you prefer that your name(s) not be included in our recognition lists, please contact Joe Kollar*

**PLEASE RETURN COMPLETED FORM VIA MAIL OR EMAIL TO THE ATTENTION OF:**

**Joe Kollar  
Development Officer  
(608) 264-6585  
Joseph.kollar@wisconsinhistory.org**

**Wisconsin Historical Foundation  
816 State Street  
PO Box 260050  
Madison WI 53726-0050**



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## Wisconsin Historical Foundation, Inc. Sample Language for Your Will

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The Wisconsin Historical Foundation, Inc. is a 501(c)(3) tax-exempt, charitable organization.

Donors who wish to support the work of the Wisconsin Historical Society through the Wisconsin Historical Foundation by including the Wisconsin Historical Foundation in their wills or wish to make beneficiary designations for financial accounts should use the following legal name:

Wisconsin Historical Foundation, Inc.  
816 State Street, P.O. Box 260050  
Madison, WI 53726

Federal Tax ID: 39-0921093

Your attorney may wish to include this number in your will or trust to help facilitate your gift.

### Sample Language for Your Will

When including the Wisconsin Historical Foundation, Inc. in your will to support the work of the Wisconsin Historical Society, you may include examples of the language below.

Your last will and testament and your financial situation are unique. The following language will work for many, and we recommend that you consult your attorney regarding any gift through your will, trust provision, or retirement plan designation you create. While we are happy to speak to your professional advisors and work with them, the Wisconsin Historical Foundation, Inc. does not provide legal guidance or tax advice.

- A. Percentage of Estate for Unrestricted Purposes:** I hereby give, devise, and bequeath to the Wisconsin Historical Foundation, Inc., a nonprofit, non-stock Wisconsin corporation with its principal office in Madison, Wisconsin, \_\_\_\_ percent of the rest, residue, and remainder of my estate as an unrestricted gift to benefit the work of the Wisconsin Historical Society.
- B. Specific Amount for Unrestricted Purposes:** I hereby give, devise, and bequeath to the Wisconsin Historical Foundation, Inc., a nonprofit, non-stock Wisconsin corporation with its principal office in Madison, Wisconsin, the sum of \_\_\_\_\_ dollars as an unrestricted gift to benefit the work of the Wisconsin Historical Society.

- C. **Percentage of Estate for Restricted Purposes:** I hereby give, devise, and bequeath to the Wisconsin Historical Foundation, Inc., a nonprofit, non-stock Wisconsin corporation with its principal office in Madison, Wisconsin, \_\_\_\_ percent of the rest, residue, and remainder of my estate to be used for \_\_\_\_\_ to benefit the work of the Wisconsin Historical Society. It is understood and agreed that, should the purpose for which this bequest is made cease to exist, the Wisconsin Historical Foundation, Inc., may devote said bequest to other uses and purposes to benefit the Wisconsin Historical Society.
- D. **Specific Amount for Restricted Purposes:** I hereby give, devise, and bequeath to the Wisconsin Historical Foundation, Inc., a nonprofit, non-stock Wisconsin corporation with its principal office in Madison, Wisconsin, the sum of \_\_\_\_\_ dollars be used for \_\_\_\_\_ to benefit the work of the Wisconsin Historical Society. It is understood and agreed that, should the purpose for which this bequest is made cease to exist, the Wisconsin Historical Foundation, Inc., may devote said bequest to other uses and purposes to best benefit the Wisconsin Historical Society.