



MACKINAC[®]

ASSOCIATES

Friends Preserving and Sharing Mackinac's Heritage

LEGACY SOCIETY



LEAVE A LEGACY

Mackinac evokes so many memories and images of a special place that has allowed individuals and families to create memories and unique experiences. In managing more than 80% of Mackinac Island and the properties at Michilimackinac State Park and Mill Creek State Park, Mackinac State Historic Parks has the unique ability to protect and preserve the most treasured natural and historical resources at the Straits of Mackinac. Through the Mackinac Associates Legacy Society, we can help preserve these wonderful resources for generations to come.

With a bequest, many of us will be able to make a larger gift than is possible in our lifetime. There are many ways to give to Mackinac Associates. Common considerations are remembering Mackinac Associates in your will or gifts of retirement assets or stocks. Our website has a more complete list of options for consideration. Please also consider Mackinac Associates when naming recipients of memorial gifts.

We hope you keep Mackinac Associates in mind as you meet with your tax advisors and estate planning attorneys. If you have already remembered us in your estate planning please let us know so that we can enroll you in the Legacy Society and extend our gratitude and provide the recognition you deserve.

Legacy Society members will be recognized in *Curiosities* and on our website. You will also be invited to a recognition event and receive a copy of a publication from Mackinac State Historic Parks.



TESTIMONIAL

My dear wife Annie and I have been members of Mackinac Associates for many years. We could not be more pleased at the enjoyment of our membership benefits.

As we consider the fact that “you cannot take it with you” we must consider possible alternatives.

And so, as we pondered gift-giving, Mackinac Associates jumped to the forefront as a bequest candidate. Though not wealthy, it was an easy decision for us to plan a bequest that would have positive impact on Mackinac Associates and Mackinac State Historic Parks, helping preserve it for generations to come.

I encourage each of you to consider a bequest and the impact it will have.

Tom and Annie Lockwood



Sample Language for Bequests:

I give and bequeath the sum of \$_____ (or description of assets) to Mackinac Associates (tax ID 38-2328863), 207 W Sinclair, Mackinaw City, MI 49701 to be used for general purposes.

Mackinac Associates can be named as a beneficiary of a retirement fund (e.g. IRA, 401(k), 403(b)), or a life insurance policy.

Mackinac Associates is a tax-exempt, 501(c)3 organization.

We encourage you to consult with your financial advisor or attorney when making a planned gift. For more information visit www.mackinacassociates.com/planned-giving.htm.

TYPES OF GIFTS

General Bequest: This is an outright bequest in your will or revocable trust that can be done as a percentage of the estate or a specific dollar amount.

Residuary Bequest: This is an outright bequest of the “rest, residue and remainder” of your estate after all other bequests, debts and taxes have been paid.

Contingent Bequest: This is a bequest made on the condition that a certain event must occur before distribution to the beneficiary. The bequest is specific in nature and is effective only if the condition is met.

Beneficiary Designation: You can designate our organization as a beneficiary of a retirement, investment, bank account or your life insurance policy.

Gift of Stocks and Bonds: Donating appreciated securities, including stocks or bonds.

Gifts by Estate Note: You make an estate note to pay off a pledge from estate assets in case the pledge remains unpaid at the time of death.

Tangible Personal Property or Real Estate: Please contact us to discuss specifics before designating a gift of this type.

For more information: mackinacassociates.com/planned-giving.htm
or (231) 436-4100.

