

## You May Join the Flagship Society by Naming SBMM as a Beneficiary:

- In your Living Trust or Will
- Of a Life Insurance policy
- By Gifting Assets from a Tax-Deferred Retirement Plan, such as a 401(k) plan or an IRA
- By Establishing a Charitable Trust that can provide lifetime income to a loved one as well as a significant future gift to the Maritime Museum
- For a Final Legacy in a Donor Advised fund

**All inquiries will be kept in strictest confidence**

Your Flagship Society gift will make a lasting impact on the Maritime Museum. It may also provide you with significant tax advantages, while continuing to provide income to you and your heirs.

We recommend that you discuss specific tax implications with your financial and/or tax advisor to ensure that your investment offers maximum benefits to you and the Maritime Museum. The Maritime Museum cannot render any type of legal or tax advice.



Create a Promising Future and a Long Lasting Legacy

*"I made a legacy gift to the Santa Barbara Maritime Museum, because I believe the past affects our future, and I want to ensure that all children in Santa Barbara County have the opportunity to participate in the Maritime Museum's Tall Ship programs. In order to protect our oceans, we have to know as much about them as possible. The Maritime Museum provides that education, those experiences, and makes learning fun."*



George and Judy Writer

**Contact SBMM Executive Director Greg Gorga**  
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**Tax ID Number 77-0392953**

# Leave a Legacy

Join our  
**Flagship Society**  
Planned Giving  
at  
**SBMM**





## About the Museum

Since opening its doors in July 2000, the Santa Barbara Maritime Museum has become a vital community treasure, celebrating the Santa Barbara Channel's rich and varied maritime history. Up to 8,000 students participate each year in the Museum's educational programs, including the Spirit of Dana Point Overnight Tall Ship Program and the Marine Science Program.

**For many students, this is their first experience on our waters.**

Through permanent and traveling exhibits, monthly lectures, films, books, and special events, SBMM preserves and celebrates the maritime heritage of our Central Coast.

**All Flagship Society gifts are deeply appreciated**



## Designating Your Flagship Society Gift

You can help the Maritime Museum chart a future filled with opportunity and excitement through a bequest, charitable trust, or other planned gift. Since our founding in 2001, many generous patrons, who care deeply about maritime history and youth education, have expressed their lasting support by including the Santa Barbara Maritime Museum in their long-term financial plans.

Unrestricted planned gifts provide the Maritime Museum with the flexibility to meet whichever needs are most urgent. If, however, you prefer to designate your estate or planned gift to the endowment, to benefit our youth programs, or to honor a loved one, please contact us so we might assist you with the wording of your designation to ensure that your intentions are honored.

## Benefits of Being a Flagship Society Member

We created the Flagship Society to honor those who have included the Maritime Museum in their estate plans.

In grateful appreciation we will:

- Feature member names on a special Flagship Society display in the Museum
- List members in our annual report and other publications
- Invite members and a guest to unique receptions held annually in their honor

The greatest reward comes from knowing that you are helping the Museum to fulfill its mission and vision for generations to come. Please let us know if you have included SBMM in your estate plans.

