

THE DAYTON ART INSTITUTE LEGACY OPPORTUNITIES

PROFESSIONAL ENDOWMENT OPPORTUNITIES

- ▶ Director & CEO
- ▶ Chief Curator
- ▶ Chief Financial Officer
- ▶ Planned Giving Officer
- ▶ External Affairs Director
- ▶ Associate Curator of Education
- ▶ Registrar
- ▶ Exhibit Designer & Chief Preparator
- ▶ Human Resources & Volunteer Services Director
- ▶ Museum Educator(s)

PROGRAM ENDOWMENT OPPORTUNITIES

- ▶ Facilities Improvement Fund
- ▶ Technology Advancement
- ▶ Art Conservation
- ▶ Special Exhibitions Fund
- ▶ Art Core Connections
- ▶ Education Program Scholarships
- ▶ Exhibition Programming
- ▶ Other Education Programs
- ▶ Curatorial Fellowship Program
- ▶ Education Fellowship Program
- ▶ Art Ball
- ▶ Oktoberfest

CAPITAL NAMINGS

- ▶ Experientcenter Classroom
- ▶ Grand Balcony
- ▶ Grand Staircases
- ▶ Great Hall
- ▶ Historic Hillside Plaza
- ▶ Historic Riverfront Entrance
- ▶ Renaissance Auditorium
- ▶ Rotunda



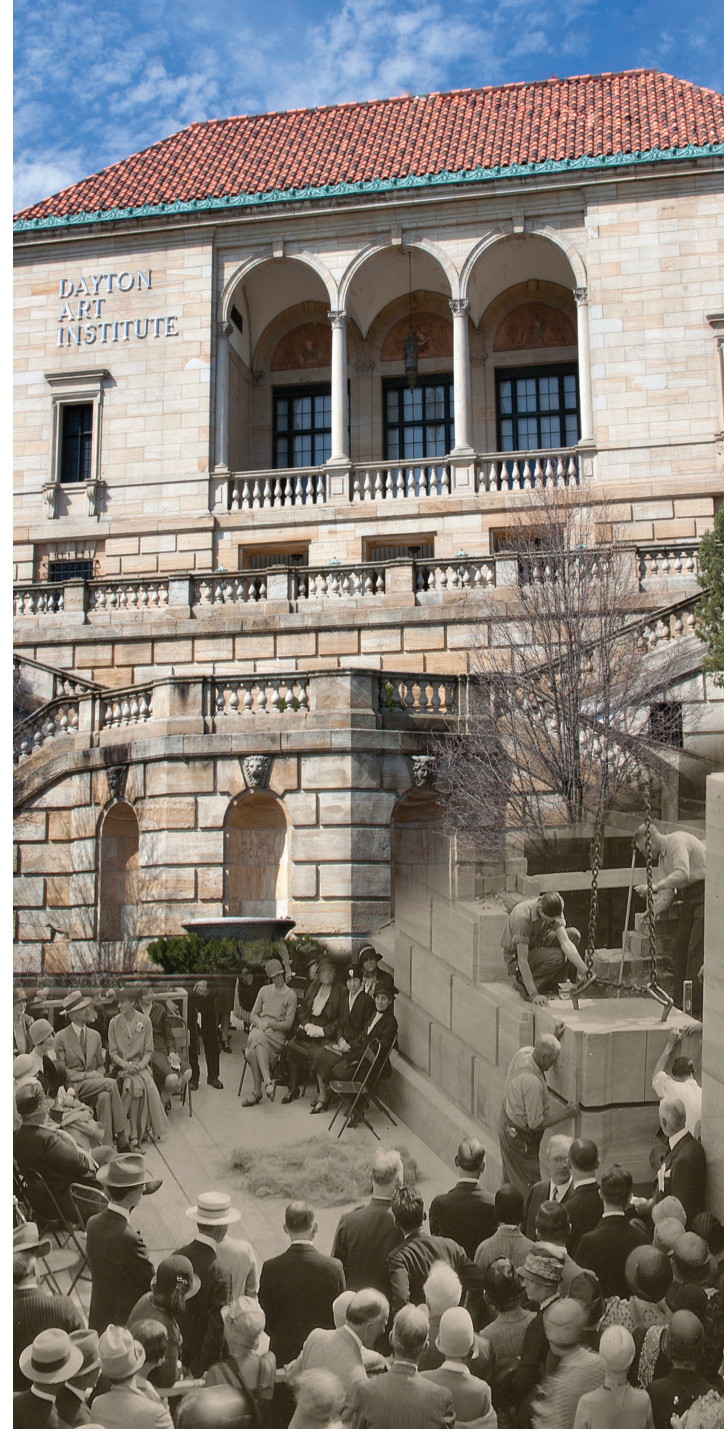
The Dayton Art Institute Planned Giving Council

Linda Hadley
Debra Hanselman
Matt Jessup
Linda Lombard
David Montgomery
Sandy Pierce
Larry Powell
Toni Sprinkel
Tom Whalen

The Carnell Circle was established in 1995, and takes its name from Mrs. Julia Shaw Patterson Carnell, who understood that The Dayton Art Institute would continue to grow and prosper through the support and gifts of many loyal friends. When the Carnell Circle was established in 1995, there were 21 charter members. As of today, the Carnell Circle membership includes 144 members, representing known gifts of more than \$12.8 million dollars. These loyal friends who have made a planned gift to the museum will continue Mrs. Shaw Patterson Carnell's legacy and continue to inspire others to give, just as her first gift did. Through each special gift, you are ensuring that in future years countless members and visitors will enjoy and be enriched by The Dayton Art Institute.

As a Carnell Circle member, your name will be included on the Carnell Circle Commemorative Plaque, located in the museum's Great Hall. Members of the Carnell Circle also receive a unique museum gift, invitations to special events and programs throughout the year, including the annual donor luncheon, and an opportunity to meet other individuals with a common interest in the future of the museum.

For more information about planned giving, please contact Natasha Spears, Development Director at (937) 512-0135 or at nspears@daytonart.org



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DAYTON ART INSTITUTE
PLANNED GIVING GUIDE

PLANNING FOR THE FUTURE OF DAI

The Dayton Art Institute is one of the finest art museums in North America, but our endowment is woefully underfunded. Since this is one of the most important measures of museum quality, it is important that we build this fund now to provide museum memories for generations to come.

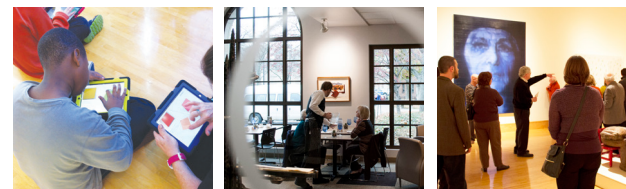
There are many ways to make planned gifts to the museum:

- ▶ **BEQUESTS** are the most common planned gift. A bequest is made through your will and pays out to the museum at your death. When you consider a bequest, consider first the assets you own that would create an income tax burden for your heirs, for example, your IRA. This money has been tax-deferred during your lifetime, but will become taxable to your heirs if you leave it to them at your death. By naming The DAI as your beneficiary, the money passes without income tax. Of course, a bequest to the museum could be made up of your assets, including real estate, and could be a percentage of your estate of a certain dollar amount.
- ▶ **A TESTAMENTARY TRUST** is generally a more substantial gift than a bequest, with a more enduring legacy. Through a testamentary trust, you can set up an endowment to provide a future flow of income to the museum in your name.



- ▶ **SPLIT INTEREST GIFTS** can actually benefit you and the museum both now and/or in the future. There are several types of split interest gifts:
- ▶ **CHARITABLE REMAINDER ANNUITY TRUST** creates a fixed flow of income for your lifetime. This income does not fluctuate as the principal increases or decreases.
- ▶ **CHARITABLE REMAINDER UNITRUST** provides you with a percentage of the principal as income each year. Your income may fluctuate as the principal increases or decreases, based on such factors as investment performance and withdrawals. As with any variable investment, there is the potential for both greater reward and greater risk in the unitrust option.
- ▶ **CHARITABLE GIFTS ANNUITY** will provide an income for you and possibly a second person (a spouse, for example) during your lifetime(s), and pay the remainder to The Dayton Art Institute at your death(s).
- ▶ **CHARITABLE LEAD TRUST** is just the opposite of the remainder trusts, in that the income is paid to the museum for a term of years (10 or 20 is common) and the remainder is gifted to your family or returned to you after the term. It's a way for the museum to use your gifts right away for capital improvements, new acquisitions, etc., and then, at the end of the term, the assets pass on to the remainder beneficiaries.
- ▶ **LIFE INSURANCE** that is no longer needed for your family is an excellent gift and can be given in two different ways: (1) simply name DAI as the beneficiary of your policy; (2) If it is a permanent pay-up life insurance policy, you could gift it to the museum during your lifetime.

- ▶ **A GIFT OF ART** is a practical way to help the museum, since it would be considered a "related use" gift. Perhaps you have an old painting, antique or sculpture that you no longer wish to keep—this might be an excellent way to help The DAI.



Each of the mentioned ideas has unique tax implications. It is important to speak with your tax, investment and/or legal professionals before making these types of gifts.

Every gift to the museum, whatever the form, will go a long way toward making certain The DAI will be here for years to come. It is Dayton's legacy, and it could be yours, too.

All naming rights are for 20 years, with the family or organization having the first right-of-refusal at the end of the naming period. The Dayton Art Institute reserves the right to re-value the naming rights for a renewed agreement. If an organization leaves the Dayton community, The DAI reserves the right to offer the naming to another individual, family, or organization before the end of agreement term.



The Dayton Art Institute partners with The Dayton Foundation for management of a charitable endowed fund and Charitable Checking AccountSM.