

## Frequently Asked Questions

**What is the campaign goal?** Capital Campaign: \$31.5M  
Endowment Campaign: \$ 3M

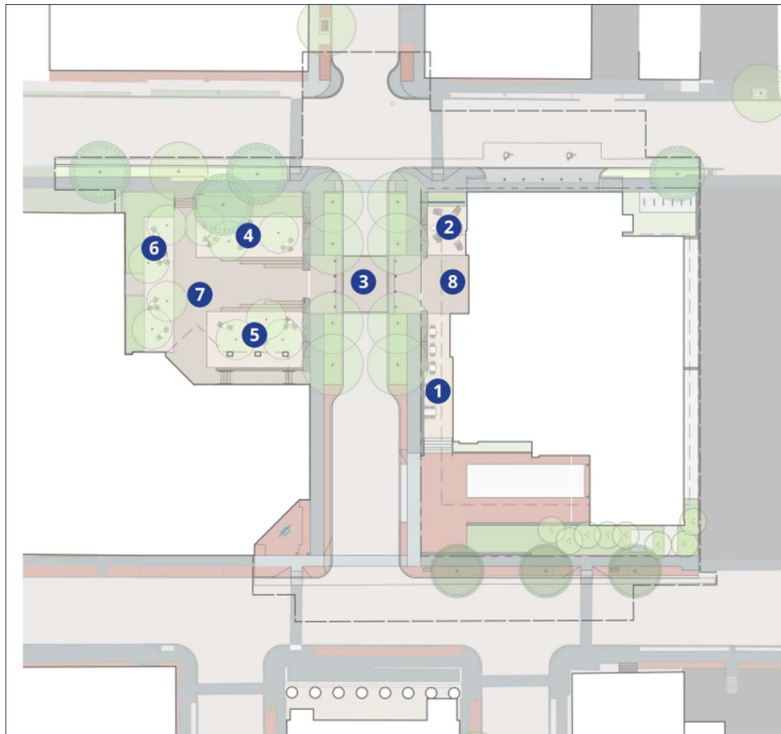
**Can we pledge over a few years?** Yes, pledges may be paid over 5 years from the time of a signed pledge intention form.

**Are their Naming Opportunities?** Yes, Amanda McMullen and Emily Mead can help find the right fit!

### Building Naming Opportunities

Entire Exhibition Center		\$10,000,000
Main Level		
Entry Vestibule		\$250,000
Welcome/Lobby - <b>PENDING</b>		\$1,000,000
Elevator		\$500,000
Front desk		\$500,000
Staircase		\$750,000
Nursing mothers' room		\$50,000
Coat check/lockers - <b>SOLD</b>		\$100,000
Café/Programs/Community living room		\$1,000,000
Café bar - <b>SOLD</b>		\$100,000
Exterior café terrace		\$250,000
Offices/Staff area - <b>SOLD</b>		\$100,000
Museum Shop		\$1,000,000
Café seating (40)		\$250-1,000
Gallery Level		
Whole Gallery Floor		\$7,000,000
Large Gallery – <b>SOLD</b>		\$5,000,000
West Gallery - <b>SOLD</b>		\$1,000,000
Middle Gallery - <b>SOLD</b>		\$500,000
City View Gallery - <b>SOLD</b>		\$500,000
East Gallery - <b>SOLD</b>		\$1,000,000
Digital Gallery		\$250,000
Gallery landing (2 available)		\$500,000
Exterior		
Full Johnny Cake Plaza		\$2,000,000
Entry Plaza - Johnny Cake Hill (#7)		\$500,000
Entry Plaza - 11 William (#8)		\$500,000
Café Terrace - along William St. (#1)		\$250,000
Entry Terrace - at William & Bethel (#2)		\$250,000
William Street Crossing (#3)		\$250,000
East Terrace - along theater exterior (#5)		\$250,000
West Terrace - along Johnny Cake Hill (#4)		\$250,000
South Terrace - along Bourne Building (#6)		\$250,000

Seating Wall (4 available)	\$150,000
Plaza Steps (2 available)	\$150,000
Plaza Planting – Johnny Cake Hill - <b>HOLD</b>	\$100,000
Plaza Planting – Water Street	\$100,000
Loading dock - <b>SOLD</b>	\$100,000
Bike Rack Area	\$100,000
Large Tree (10 available)	\$75,000
Small Tree/Shrub (20 available)	\$50,000
Movable Chairs and Tables (25 available)	\$1,000
Stone Pavers (100+ available)	\$500



- 1) Café Terrace
- 2) Entry Terrace – William & Bethel
- 3) William Street Crossing
- 4) West Terrace
- 5) East Terrace
- 6) South Terrace
- 7) Entry Plaza – Johnny Cake Hill
- 8) Entry Plaza- 11 William

#### Endowed Positions and Funds Available

Endowed Position	Minimum Contribution	Annual draw - Fully Funded
President & CEO	\$5,000,000	\$180,000
Museum Experience & Community Engagement	\$2,000,000	\$90,000
Philanthropy, Director	\$2,000,000	\$90,000
Museum Learning & Education, Assoc. Director	\$1,500,000	\$67,500
Digital Engagement, Director	\$1,500,000	\$67,500
Facilities & Security, Director	\$1,000,000	\$45,000
Collections Manager	\$1,000,000	\$45,000
Curatorial, History	\$1,000,000	\$45,000
Curatorial, Science & Research	\$1,000,000	\$45,000
Curatorial, Contemporary Art & Community Projects	\$750,000	\$33,750
Exhibitions Manager	\$750,000	\$33,750
Youth Programs (Apprenticeship)	\$700,000	\$31,500
Fellowship position	\$500,000	\$23,750

Endowed Fund	Minimum Contribution	Fully Funded	Annual draw - Fully Funded
Education & Museum Learning Department	\$500,000	\$7,000,000	\$315,000
Curatorial Department	\$500,000	\$7,000,000	\$315,000
Student Learning Program Fund	\$100,000	\$3,000,000	\$135,000
Exhibition Fund	\$100,000	\$3,000,000	\$135,000
New Bedford Admissions Access (free admissions)	\$50,000	\$5,000,000	\$225,000
Capital Facilities Fund	\$50,000	\$2,200,000	\$99,000
Family Programs Fund	\$50,000	\$2,000,000	\$90,000
Apprentice Program Fund	\$50,000	\$2,000,000	\$90,000
Library Fund	\$50,000	\$1,750,000	\$78,750
Digital Learning Fund	\$50,000	\$1,750,000	\$78,750
Publications & Research Fund	\$50,000	\$750,000	\$33,750
Scholar/Artist in Residence	\$50,000	\$1,750,000	\$78,750
Acquisition Fund	\$25,000	\$1,500,000	\$67,500
Preservation Fund (Collections Care)	\$25,000	\$1,500,000	\$67,500
Outreach & Engagement Fund	\$25,000	\$1,000,000	\$45,000
Staff Investment Fund	\$25,000	\$1,000,000	\$45,000
Signature Program Fund	\$25,000	\$750,000	\$33,750
Portuguese Lecture Series Fund	\$25,000	\$750,000	\$33,750
Cape Verdean Lecture Series Fund	\$25,000	\$750,000	\$33,750
Portuguese Studies Fund	\$25,000	\$500,000	\$22,500
Lyceum Fund	\$25,000	\$500,000	\$22,500
Sailor's Series Fund	\$25,000	\$500,000	\$22,500
Symposium Fund	\$25,000	\$500,000	\$22,500
Legacy Fund (Unrestricted)	\$10,000		

**Is the Whaling Museum accredited?** Yes, we are accredited by the American Alliance of Museums.

**How do we know the museum manages its resources effectively?** The Museum conducts an independent audit annually. Annual reports and Audited Financial Statements are available on our website at <https://www.whalingmuseum.org/about/financials/>. Additionally, the Museum is proud to report a four star rating from Charity Navigator for sound fiscal management and commitment to accountability and transparency. Charity Navigator is America's premier independent charity evaluator. Old Dartmouth Historical Society (New Bedford Whaling Museum) is a GuideStar Platinum Participant.

**Ways to Support** Pledge commitments may be paid over a period of up to 5 years from the time of a signed pledge form. Payments towards the capital campaign may be made in cash, by check or through transfer of stock or wire. Property which may be liquidated by the Museum may be used to fulfil a pledge. There are several ways to support the effort and many are listed below. It is best to discuss options with Emily Mead at [emead@whalingmuseum.org](mailto:emead@whalingmuseum.org) or at (508) 717-6850 or with Amanda McMullen at [amcmullen@whalingmuseum.org](mailto:amcmullen@whalingmuseum.org) or at (508) 717-6811.

#### Stock Transfer Instructions

Please provide your brokerage firm with the following information to initiate a stock transfer:

Your account number at the delivering firm

Name and symbol of holding(s) you want transferred

Number of shares

Registration information of the receiving firm: Old Dartmouth Historical Society

Receiving firm name: Vanguard

Receiving account number: 22574094

Receiving firm DTC number: 0062

### **Wire transfer Instructions**

#### Receiving Bank:

Bristol County Savings Bank

29 Broadway

Taunton, MA 02780

ABA number: 211370859

#### Beneficiary:

Acct # 27078317

Old Dartmouth Historical Society

New Bedford Whaling Museum

18 Johnny Cake Hill

New Bedford, MA 02740

### **Planned Giving**

The Museum has a planned giving society, called *The Bourne Society*. If you have already included the Museum in your estate plans, please let us know. While participation in the Bourne Society can be anonymous, your willingness to be recognized as a member of the Bourne Society inspires others to follow your example and help make the Museum “A Forever Institution.”

The Museum is set up to receive the following gifts:

#### Bequests

A bequest from either a will or living trust provides a contribution to the Whaling Museum free of estate tax. You can give cash, specific property, or a percentage of your estate. Because your gift does not come to the Museum until after your lifetime, you can leave a legacy without giving up assets today.

#### IRA Charitable Rollover Gift

If you are older than 70 ½ years, you can make charitable gifts directly from your individual retirement accounts (IRAs). Transfers of up to \$100,000 per individual per year directly from a traditional or Roth IRA to qualified charities, including the Whaling Museum, are permitted without income recognition by the donor. Consult with your legal and financial advisors to stay informed regarding the changing tax landscape and potential benefits of making charitable donations from an IRA.

#### Charitable Gift Annuity

A gift annuity is one of the most popular and simplest types of planned gifts. You donate assets that the Museum invests into its endowment. The Museum agrees to provide a fixed payment to you and/or a beneficiary for life. At the end of the agreement, the funds become available to support the Museum’s mission. A charitable deduction for a portion of the value of gift is available to the donor immediately. The income payments are also partially tax-free.

#### Charitable Remainder Unitrust and Charitable Remainder Annuity Trusts

A Charitable Remainder Unitrust (CRUT) and a Charitable Remainder Annuity Trust (CRAT) are arrangements where a donor places assets in a Trust that makes payments to the donor (and/or someone else chosen by the donor) at least annually. It can run for the lifetime of an individual, or for a specified number of years. After this lifetime, the assets go to the Museum. For a CRUT, the pay-out to the income beneficiary each year is a fixed percentage of the value of trust principal, revalued annually. A CRAT pays out a fixed dollar amount annually, which does not change.