

**What is the fundraising goal?** Estimated Project Cost: \$36.8M  
Additional Endowment: \$3M

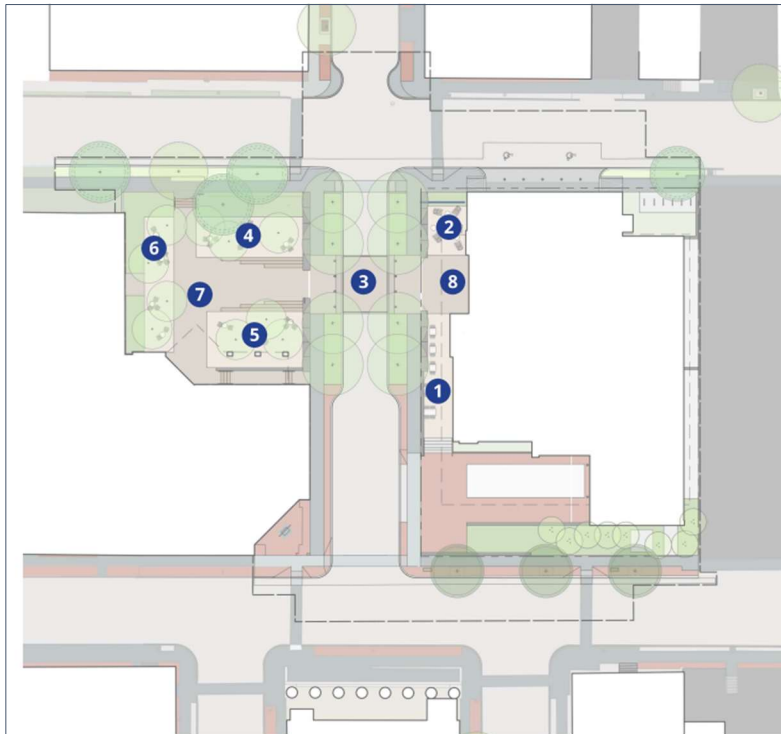
**Can we pledge over a few years?** Yes, pledges may be paid over 5 years from the time of a signed pledge intention form.

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

## Building Naming Opportunities

|   |  |                     |
|---|--|---------------------|
| <b>Entire Exhibition Center</b>                   |  | <b>\$10,000,000</b> |
| <b>Main Level</b>                                 |  |                     |
| Entry Vestibule - <b>SOLD</b>                     |  | \$250,000           |
| Welcome/Lobby - <b>SOLD</b>                       |  | \$1,000,000         |
| Elevator  |  | \$500,000           |
| Front desk  |  | \$500,000           |
| Staircase   |  | \$750,000           |
| Nursing mothers' room - <b>SOLD</b>               |  | \$50,000            |
| Coat check/lockers - <b>SOLD</b>                  |  | \$100,000           |
| Café/Programs/Community living room – <b>SOLD</b> |  | \$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         |
| <b>Gallery Level</b>                              |  |                     |
| Full 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           |
| <b>Exterior</b>                                   |  |                     |
| Full Johnny Cake Plaza - <b>SOLD</b>              |  | \$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) - <b>SOLD</b>        | \$150,000 |
| Plaza Steps (2 available) - <b>SOLD</b>         | \$150,000 |
| Plaza Planting – Johnny Cake Hill - <b>SOLD</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.