



*"Esther and I have been invested in the South Carolina Aquarium since the very beginning and have been dedicated to the significant education and conservation impact it makes on our community. Making a planned gift to the Aquarium ensures that this superb institution continues to provide the indispensable learning opportunities that only it can deliver."*

*-James L. Ferguson  
Chairman Emeritus of the  
Board of Directors*

Leading the way to connect  
people with water, wildlife  
and wild places.

#### NAUTILUS SOCIETY

The Nautilus Society honors those who leave a gift to the South Carolina Aquarium in their will, create a charitable remainder trust or charitable lead trust to benefit the Aquarium, name the Aquarium as a beneficiary of retirement assets or life insurance, or create some other type of deferred gift. Members of the Nautilus Society lead the way for other donors and provide lasting resources that allow the South Carolina Aquarium to connect future generations to the natural world.

#### Nautilus Society members enjoy these special benefits:

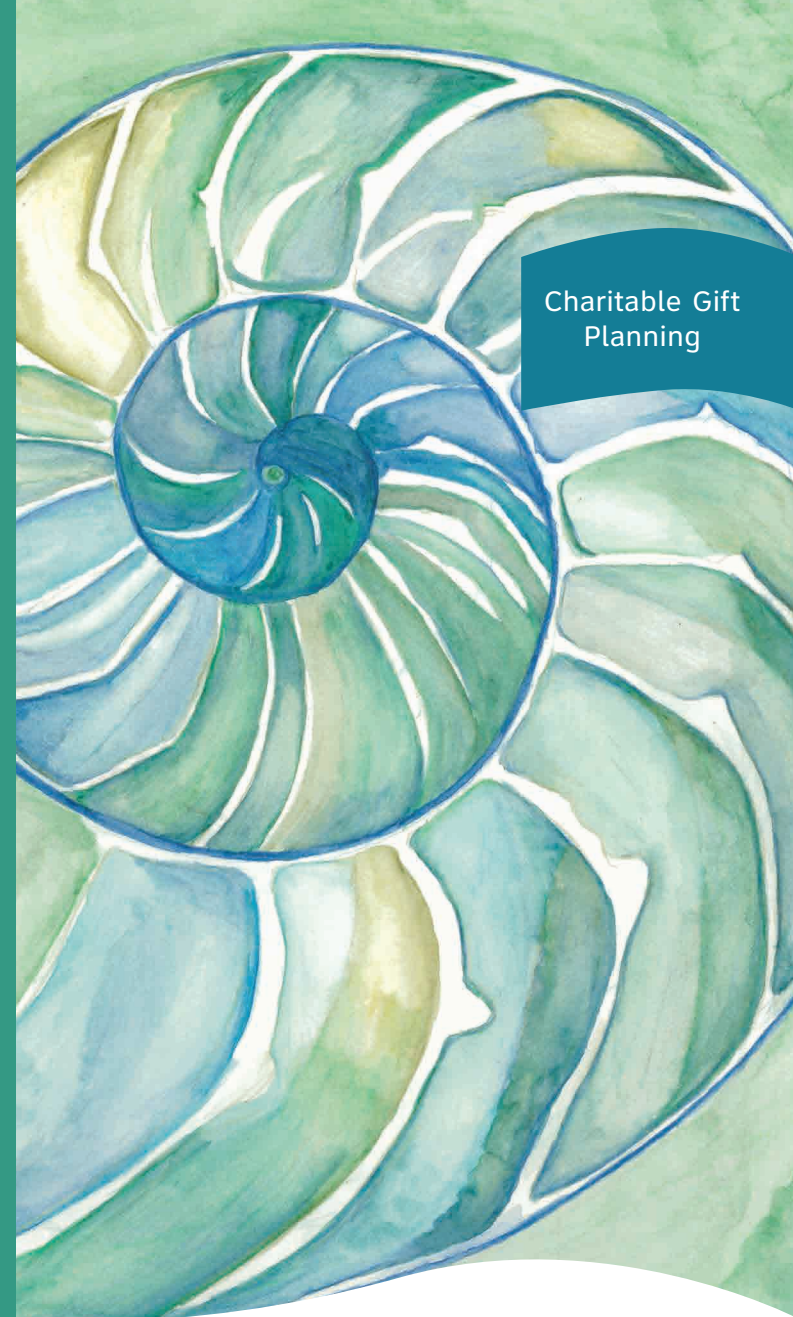
- Recognition, with your permission, in annual publications and on our donor wall
- Membership in the Watershed Society
- Invitations to exclusive Aquarium events, including an annual Nautilus Society luncheon with the President and CEO
- Opportunity to schedule a personal behind-the-scenes tour
- Invitations to charitable gift planning seminars



100 Aquarium Wharf  
Charleston, South Carolina 29401  
[scaquarium.org](http://scaquarium.org)

Our Federal Tax ID number is 57-0961897.

The South Carolina Aquarium is a nonprofit organization under section 501(c)(3) of the Internal Revenue Code. All charitable contributions are tax-deductible to the full extent allowed by law.



Charitable Gift  
Planning



**NAUTILUS SOCIETY**  
SOUTH CAROLINA AQUARIUM

# Find the right way to Make a Difference

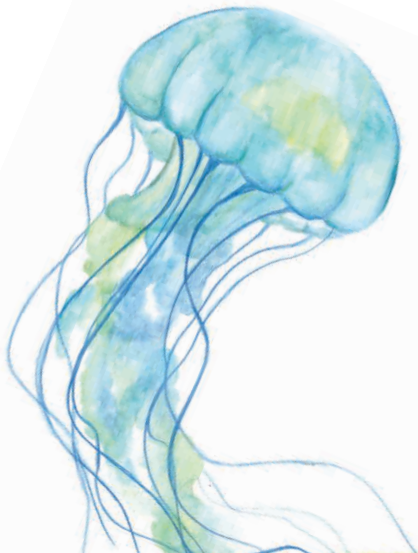
Charitable gift planning allows you to achieve your financial goals and share your philanthropic values with future generations as you also provide for your loved ones and endow the South Carolina Aquarium and its mission.



Thank you for considering a planned gift to the South Carolina Aquarium. For more information, please contact us at (843) 579-8629 or [legacy@scaquarium.org](mailto:legacy@scaquarium.org).

Visit us anytime at [scaquarium.org/ways-to-give](http://scaquarium.org/ways-to-give).

YOUR GOAL	Make a quick and easy gift	Reduce tax on capital gains or make a larger gift than would be possible with cash	Make a gift that costs nothing during your lifetime	Reduce taxes and deferred tax plan assets	Make a large gift at little or no cost to you	Create a fixed or variable income stream and reduce or defer capital gains taxes	Reduce gift and estate taxes on assets you pass to your children or grandchildren
<b>YOUR GIFT</b>	<b>Cash</b>	<b>Appreciated Securities</b>	<b>Bequest</b>	<b>Retirement Plan Assets or IRAs</b>	<b>Life Insurance</b>	<b>Charitable Remainder Trust</b>	<b>Charitable Lead Trust</b>
<b>HOW YOU MAKE THE GIFT</b>	Write a check or make a credit card donation online	Contribute appreciated stock or other marketable securities that you have owned for at least one year	Name the South Carolina Aquarium in your will or living trust by designating a specific amount, or a percentage or share of the residual	Name the South Carolina Aquarium as the successor beneficiary of your plan or IRA	Donate a paid-up life insurance policy you no longer need or take out a new policy and name the South Carolina Aquarium as the beneficiary and owner	Create a[n] [irrevocable] trust that pays fixed or variable income to donor and/or others for life or a term of years. Remainder passes to the South Carolina Aquarium	Create a charitable trust that pays fixed or variable income to the South Carolina Aquarium for a specific term of years. Principal (remainder) is retained for your heirs
<b>YOUR BENEFITS</b>	<ul style="list-style-type: none"> <li>Charitable tax deduction in year of gift</li> </ul>	<ul style="list-style-type: none"> <li>Charitable tax deduction in year of stock transfer</li> <li>Reduce or eliminate capital gains tax</li> <li>Can use cash you otherwise would have donated for a different purpose, to diversify your portfolio or to repurchase the securities at a higher cost basis</li> </ul>	<ul style="list-style-type: none"> <li>Donation exempt from federal estate tax</li> <li>Retain control of your assets during your lifetime</li> </ul>	<ul style="list-style-type: none"> <li>Donation exempt from federal and income taxes; your heirs will reduce income taxes</li> <li>Continue to take withdrawals from plan during your lifetime</li> <li>Make your gift from some of your highest tax appreciated assets</li> </ul>	<ul style="list-style-type: none"> <li>Charitable tax deduction in year of contribution for paid-up policy; future income tax deduction for premium payments on a new policy</li> <li>Donation exempt from federal estate tax</li> </ul>	<ul style="list-style-type: none"> <li>Current income tax deduction for a portion of the assets placed in the trust</li> <li>Reduce taxable assets from your estate</li> </ul>	<ul style="list-style-type: none"> <li>See the benefit to the South Carolina Aquarium during your lifetime</li> <li>Assets pass to heirs with reduced gift and estate taxes</li> <li>Reduce taxable assets from your estate</li> </ul>



The purpose of this brochure is to provide general information. It is not intended as legal, accounting, tax or other professional advice and should not be relied upon as such. For assistance with your particular situation, please consult an attorney, tax advisor, financial advisor or other professional.