



If you would like to contribute to the **Piasa Chautauqua Endowment Fund (PCEF)**, here is the process...

In addition to including the PCEF in your estate planning, there are 3 ways you can give now:

1. Cash (Check) – To make a cash donation:
  - a. Make out check to the Chautauqua Historical Society (CHS) and in the MEMO write “Donation to PCEF”
  - b. Give or send check to Treasurer of the CHS (currently Bob Hormell – contact info below)
  - c. CHS will record your donation (for tax purposes) and send to Greg Bray at Smith Moore (our Financial Advisor)
  - d. Within 30 days, you will receive a “Thank You” letter from CHS documenting your donation for tax purposes
2. Transfer Assets In Kind – To transfer securities (stocks, bonds),
  - a. Contact Greg Bray at Smith Moore (contact info below)
  - b. Greg will coordinate with you and/or your financial advisor to move the assets
  - c. Greg will contact CHS to ensure there is a record of your donation
  - d. Within 30 days, you will receive a “Thank You” letter from CHS documenting your donation for tax purposes
3. IRA Required Minimum Distribution (RMD) – donation to PCEF will count toward your RMD but will NOT be included in your taxable income.
  - a. Applicable for those currently taking RMDs from their IRA. Allows tax-deductible gift even if you currently use the standard deduction when filing tax return
  - b. Donation check will go directly from your IRA to PCEF.  
Contact your financial advisor or Greg Bray for assistance/guidance.
  - c. Greg will contact CHS to ensure there is a record of your donation
  - d. Within 30 days, you will receive a “Thank You” letter from CHS documenting your donation for tax purposes

### **Chautauqua Historical Society**

Robert Hormell - Treasurer  
294 N. Meridian Road  
Glen Carbon, IL 62034  
Cell: 314-223-9775

### **Smith Moore & Company**

7777 Bonhomme Ave., Suite 2400  
Clayton, MO 63105

Greg Bray  
Financial Advisor  
[gbray@smithmoore.com](mailto:gbray@smithmoore.com)  
Cell: 618-530-6031

Debbie Manley  
Senior Client Associate/Office Manager  
[dmanley@smithmoore.com](mailto:dmanley@smithmoore.com)  
Work: 314-446-1673