

# Many Ways to Give

## Leave a Legacy

The Marist High School Foundation invites you to share in their vision of a bright future for Marist Catholic High School. Establishing a planned gift is an excellent way to invest in an exceptional Catholic education. Plan now to advance the Marist mission of educational excellence with a legacy gift that will touch the lives of countless Marist students now and in the future.

## Invest in Excellence

The Marist Foundation, established in 1968, successfully manages long-term endowment funds, including named scholarship funds and assets of more than \$3.4 million, for the benefit of Marist and its students. The solid financial support provided by the Marist Foundation through the years has played a key role in the success Marist enjoys today and has made a tremendous impact on the students who benefit from the tuition assistance that scholarships provide each year.



### Gifts Now

**Appreciated Securities** (or other assets): The gift of appreciated securities is most often in the form of common stock or mutual funds. Such a gift is a valuable way to benefit Marist and for you to receive tax benefits based on the fair market value of the assets. Other appreciated assets, like real estate, may be gifted, but it is important to discuss these in advance with the Marist Foundation.

**Charitable IRA Rollover:** A giving opportunity for those over 70 ½ — Federal legislation allows you to make tax-free distributions from your IRA directly to the Marist Foundation. This distribution is not included in your adjusted gross income, so there is no payment of additional tax on a qualified distribution.

**Real Estate:** Real estate may be deeded outright to the Marist Foundation or left by bequest. The irrevocable gift of property may provide an immediate tax deduction and avoid capital gains. Due to complexities, be prepared to work with the Marist Foundation and qualified advisors to ensure that this is a suitable gift for both you and for the Marist Foundation.

**Life Insurance:** Make a gift of an existing policy, or buy a policy, making the Marist Foundation the owner and beneficiary.

### Gifts that Pay Income

**Charitable Gift Annuity:** The gift annuity is an irrevocable gift of cash or securities where you receive a predictable fixed income for life. At termination, the Marist Foundation receives the residual value of the annuity. Due to increased regulation, gift annuities may need to be administered through a third party or through a very similar tool known as a Charitable Remainder Trust (see below).

**Charitable Remainder Trust:** The remainder trust is an irrevocable gift of assets into a charitable trust that provides you a fixed (Annuity Trust) or variable (Unitrust) income for life or for a specified set term. At the trust's termination, the trust assets become a generous gift to the Marist Foundation. There are also potential tax benefits dependent upon your situation.

**Charitable Lead Trust:** The lead trust's income payments are distributed to the Marist Foundation for a set period of years, after which the assets are transferred back to the grantor or whomever the grantor has named the beneficiary. This provides generous annual support for the Marist Foundation now, removes the asset from the estate and passes an asset to heirs with little or no tax. There is no immediate deduction for the lead trust.

### Gifts Later

**Bequest:** A bequest is a gift through your will or revocable trust that enables you to retain the asset during your life and provide significant support when you no longer require the asset. You may choose a specific item, a percentage or a residual bequest. You may also choose to make the Marist Foundation a contingent beneficiary in case the heirs are unable to receive the estate.

**Retirement Plan Assets:** In some cases, retirement assets can be the heaviest taxed asset in an estate. Naming the Marist Foundation as a beneficiary can avoid the taxation, enabling the asset to pass tax free to the Marist Foundation. You may also make the Marist Foundation a percentage beneficiary or a contingent beneficiary of a retirement plan.

**Bank or Investment Account:** Financial accounts can be a simple and inexpensive way to leave a legacy gift. Contact your financial advisor to see how easy the process is to make the Marist Foundation a beneficiary of a particular investment or bank account.

**Memorial Giving:** A memorial contribution to the Marist Foundation is a meaningful expression of sympathy for a loved one. The Foundation's name and address are simply listed as part of the obituary. Contributors will be acknowledged by letter and listed in Marist's Annual Donor Report. The name of the memorialized loved one will be entered in Marist's Book of Remembrance for perpetual prayer.

Thank you for considering a legacy gift to the Marist Foundation and the impact it will make on the future support of Marist. We encourage you to consult with your professional advisors on how this gift would fit within your estate plans.



*This publication is intended to provide general gift planning information. Our organization is not qualified to provide specific legal, tax or investment advice, and this publication should not be looked to or relied upon as a source for such advice. Please consult with your own legal and financial advisors before making any gift.*



*"We've been blessed. Our CPA said, 'If you give it away while you're alive, you're going to feel a whole lot better.' We see the value of endowment giving, and have created a planned gift that will benefit Marist and others. By making a planned gift we've left a lasting gift that lives forever."*

— Jon & Terri Anderson  
Parents of alumnus Drew Anderson '14

Jon and Terri have seen the results of many of their gifts, one of which is sponsoring a room in the science wing at Marist.



### Join the Legacy Society

Make a gift in your estate planning and become a member of the Marist Legacy Society. To gain membership into the Legacy Society, simply inform the Marist Foundation in writing that you have designated the Marist High School Foundation or Marist Catholic High School as a beneficiary to receive a gift as part of your estate plans and include *one* of the following:

- A completed, signed Legacy Society Confidential Membership Form (available upon request)
- A copy of the pertinent provisions in your will or trust
- A copy of the Life Insurance policy naming the Marist High School Foundation as a beneficiary
- A letter from your attorney stating you have included the Marist High School Foundation in your estate plans

Members of the Legacy Society include alumni, parents, grandparents and friends who, through thoughtful estate planning, deferred giving and other forms of planned gifts, ensure that financial resources will be available to support Marist well into the future.

### Contact Us

We would welcome the opportunity to speak with you prior to finalizing your estate plan with your financial advisor, accountant or tax consultant to ensure the goals for your legacy planned gift are achieved. If you are interested in discussing the next step, wish to explore options for making a planned gift, want to join the Legacy Society, or have already made provisions for a legacy gift to the Marist Foundation, please contact us.

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# Planned Giving

*Leaving a Legacy*

**Marist Foundation**

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