

**THERE ARE MANY WAYS TO BECOME A**  
**I746 SOCIETY MEMBER**





**When you make a planned gift to Princeton, your generosity has an impact far into the future. Your gift supports generations of students whose lives will be forever changed by their Princeton experience.**

There are many ways you can make a gift that will cost you nothing today. Other gift plans can provide retirement income for you or loved ones, or can help pass assets to the next generation. You can support Princeton's mission and join the 1746 Society by:

- including Princeton in your will
- naming Princeton as a beneficiary of an IRA, retirement plan, insurance policy, or bank account
- creating a charitable trust or charitable gift annuity
- if approaching your 50th reunion or higher, making an Annual Giving Legacy gift to benefit your class

*Front cover, clockwise: William Ho '87 and Bruce Stuart; Shani Am. Moore '02; Skip Fox '75; Kathy Molony '71 and Richard Hollingsworth '71; Victoria Baum Bjorklund '73; and James Posner \*70. Photos courtesy of each 1746 Society member.*



**PLANNED GIFTS HELP  
KEEP PRINCETON ON THE  
WORLD'S CENTER STAGE**

PHOTO: TOM GRIMES

# WAYS TO GIVE

**Princeton offers many ways to reach your financial and philanthropic goals, as well as expert advice to help you find the right balance.**

*\*May be eligible for Annual Giving class credit*

## YOUR GOAL

## YOUR STRATEGY

## DESCRIPTION

*I'm almost 65. I want to have enough for my retirement and give a gift to Princeton, too.*

Charitable Gift Annuity\*

A gift that provides income for life and leaves a remainder for Princeton.

*I have appreciated stock that pays me a dividend. How can I make a gift to Princeton and continue to receive an income during my life?*

Charitable Remainder Trust\*

A gift that provides income for life or a specific term and leaves the remainder to Princeton.

*I want to make a gift to Princeton, but I am also concerned about providing for my heirs and the impact of gift or estate tax.*

Charitable Lead Trust\*

A gift that provides for Princeton for a specific term while benefitting your heirs.

*I'd like to make a gift to Princeton that costs me nothing now.*

Bequest -or- Beneficiary designation

Include Princeton in your will or as a beneficiary of a life insurance policy, IRA, retirement plan, outside trust or bank account.

## YOUR INCOME

## YOUR BENEFITS

## MINIMUM GIFT

- Fixed payments when gift is established
- Remainder is a gift to Princeton

- Fast and easy to set up
- Payments guaranteed and partially tax-free
- Reduces your taxable estate in most cases
- Capital gains taxes reduced and/or deferred
- Charitable deduction on federal income tax
- Gift can be designated to support Princeton priorities
- Expert investment and administration

**\$25,000**

- Unitrust payments vary depending on investment performance
- Remainder is a gift to Princeton

- Payments may be higher than stock dividends
- Can add to a unitrust at any time
- Reduces your taxable estate in most cases
- Capital gains taxes reduced and/or deferred
- Charitable deduction on federal income tax
- Gift can be designated to support Princeton priorities
- Expert investment and administration at much lower fees than commercial managers

**\$100,000**

- Income to Princeton during term of the trust and assets to you or your heirs thereafter
- You control the timing and distribution of assets

- Federal gift/estate tax or income tax deduction
- May reduce taxable estate
- Gift can be designated to support Princeton priorities
- Expert investment and administration at much lower fees than commercial managers

**\$1,000,000**

- Not applicable

- Easy to do and costs nothing now
- Can be a percentage of your estate or a specific amount
- Reduces your taxable estate in most cases
- Gift can be designated

**Any Amount**



When you include Princeton in your estate plan or create a life income gift, you become a member of the University's 1746 Society. The society is named in honor of the year the University was founded.

### Benefits of 1746 Society Membership

- A permanent legacy at Princeton
- Reports on the investment performance of gifts to Princeton and highlights of the gift planning program
- Professional, personalized gift planning services
- Invitations to members-only events
- Recognition in select Princeton publications, with your permission
- Option to be an anonymous member if you do not want your membership publicly recognized

Help your class achieve an Annual Giving record. Major reunions beginning with the 50th are eligible for the **Annual Giving Legacy** program. Through a charitable gift annuity or charitable trust of \$100,000 or more, you can provide income for yourself and/or a beneficiary and support Princeton in perpetuity through your class's Annual Giving endowment or as an endowment fund in your name.



*Kathy Molony '71 and Richard Hollingsworth '71*

*“Our Princeton years had an enduring impact on our lives. By making an Annual Giving Legacy gift, we are honoring that impact and extending it forward to future Princetonians.”*

—KATHY MOLONY '71 AND RICHARD HOLLINGSWORTH '71

**...FORWARD TOGETHER  
WITH YOUR CLASS AND  
INTO YOUR FUTURE**



James Posner \*70

Consider a **charitable gift annuity** or **charitable remainder trust** to diversify your portfolio, increase your income, reduce or defer capital gains tax, and provide a federal income tax charitable deduction while supporting Princeton.

*“We created two charitable remainder trusts to be used by the University to meet its highest funding needs at the time the money becomes available because the University’s priorities are our priorities. We want to leave a legacy, both personal and institutional.”*

— JAMES POSNER \*70

...LOCK IN FUTURE FUNDS  
FOR YOU AND **PRINCETON**



*Shani Am. Moore '02*

# ...ADD PRINCETON TO YOUR WILL OR ESTATE PLAN, MULTIPLY YOUR IMPACT

*“Thanks to Princeton, my world expanded in ways I never thought possible.  
I want to extend this opportunity to help exceptional young people excel.”*

—SHANI AM. MOORE '02

A **bequest** is a gift that comes to Princeton after your lifetime through your will. Direct a specific dollar amount or assets to the University, or direct all or a percentage of the remainder of your estate after your other beneficiaries have received their inheritances and estate-related expenses have been paid.

No will is necessary to designate the University as a beneficiary of your **IRA, retirement plan, life insurance** or **bank account**. You continue to take regular withdrawals during your lifetime; afterwards the funds pass to Princeton free of taxes. If your family's needs change, the beneficiary designation to Princeton can be changed.

# GIVING OPPORTUNITIES

## GIFTS THAT COST NOTHING TODAY

- The following bequest language can be used in your will: *I give and bequeath to the Trustees of Princeton University, a New Jersey not-for-profit corporation, the sum of \_\_\_\_\_ Dollars {or all the rest, residue, and remainder of my estate} to be used for the purposes of the University at the discretion of its Board of Trustees.*
- The University's tax ID number (EIN) is 21-0634501.

Our address and contact information for estates and trusts is:  
Office of the General Counsel  
Princeton University  
New South Building, Fourth Floor  
Princeton, NJ 08544  
609.258.2500

## GIFTS THAT PAY YOU AN INCOME

- A **Deferred Charitable Gift Annuity (DCGA)** is another way to provide yourself and/or your beneficiaries with an income stream. Starting at age 55, DCGAs may be established with rates set for future payments; payments can begin as early as age 65.
- If your 50th — or 55th, 60th, 65th, 70th or more — reunion is on the horizon, receive Annual Giving major reunion class credit for life income gifts through Princeton's **Annual Giving Legacy program**. Gifts made in the form of a charitable remainder unitrust (fluctuating income) or a charitable gift annuity (fixed income) are eligible for AG class credit.

Learn more about life income gifts

<https://giving.princeton.edu/giftplanning/life-income-gifts>

From \_\_\_\_\_  
(Name and class year)

- YES**, I have named Princeton in my estate plan and
  - I would like to be enrolled in the 1746 Society.
  - I am a member of the 1746 Society.
- YES**, please send me information about (check all that apply)
  - Making a bequest to Princeton
  - Using my IRA to support Princeton
  - Making a gift of real estate or other appreciated assets to Princeton
  - Annual Giving Legacy to support my class
  - Tax-deductible gifts to Princeton that provide income to me and/or others

My birthdate is: \_\_\_\_\_

Birthdate of another income beneficiary: \_\_\_\_\_

Gift amount for illustration only: \$ \_\_\_\_\_

Note: If gift amount is left blank, we generally use \$100,000 for Initial Illustrations.

I prefer to receive information by:  email  U.S. mail  both

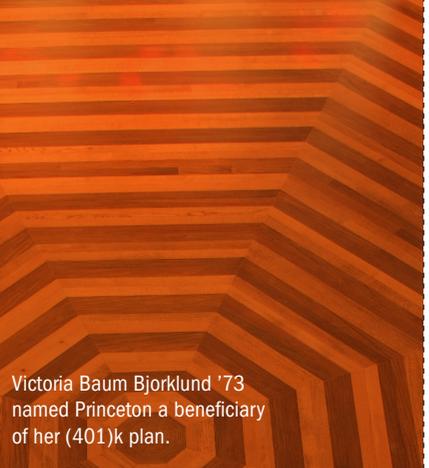
Email: \_\_\_\_\_  
Email address

Print mail: \_\_\_\_\_  
Address

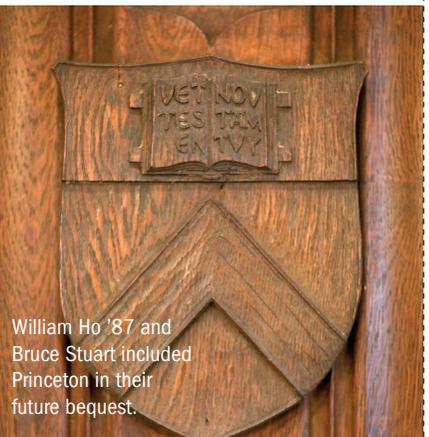
Address

City, state, zip

Phone



Victoria Baum Bjorklund '73 named Princeton a beneficiary of her (401)k plan.



William Ho '87 and Bruce Stuart included Princeton in their future bequest.



Please detach, fold and seal for your privacy, return by U.S. mail, or scan to [1746Soc@princeton.edu](mailto:1746Soc@princeton.edu). Thank you for your interest in making a special gift to Princeton!

We invite you to join 1746 Society and be recognized along with Victoria Baum Bjorklund '73 and William Ho '87 who have made special commitments to Princeton by will or other planned gifts.

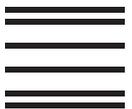


## GIFT PLANNING

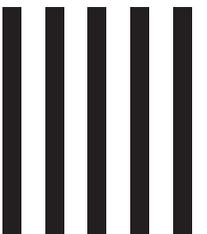
Visit [alumni.princeton.edu/giftplanning](http://alumni.princeton.edu/giftplanning)

Email [1746soc@princeton.edu](mailto:1746soc@princeton.edu)

Call 609.258.6318



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