



"Forever Loyal"

Fidelis Society Membership EASY & AFFORDABLE WAYS TO GIVE BACK

When something is valuable, you want to handle it with care, to preserve it so that it lasts. That same instinct also drives many of our supporters to invest in the future of Mount Mary. If our mission has positively impacted your life and you want others to benefit from that same experience in the future, here are **four simple options** to make a meaningful gift with ease.

1

Include Mount Mary University in your will or living trust.

One of the most popular and easiest ways to support our mission is to remember us in your will. Adding a gift to your will or trust is actually quite easy. Simply ask your attorney to draft a codicil or an amendment to the existing document. If you do not have a will or trust, you will want your attorney to craft a document that includes your gift. For sample language you can share with your attorney to include Mount Mary University your will or trust, please contact us.

2

Name Mount Mary as a beneficiary of a retirement account.

This arrangement is one of the most tax-smart ways to support Mount Mary after your lifetime. If your loved ones are the beneficiaries of your retirement plans, federal income taxes alone can erode a significant percentage of the amount they receive from your plan. In contrast, as a nonprofit organization, we bypass any taxes and receive the full amount. To arrange this gift, contact your plan administrator for a change-of-beneficiary form. Name our organization, along with the percentage you would like us to receive, on the beneficiary form. Then return the form to your plan administrator.

3

Designate us as a beneficiary of a life insurance policy.

This is a low-cost way to make a large gift. When you first bought a life insurance policy, you most likely wanted to protect the financial stability of your family should anything happen to you. If your circumstances have changed so that the original purpose for the protection no longer applies, we hope you will consider naming Mount Mary as a beneficiary of a policy to support our mission after your lifetime. To complete your future gift, contact your insurance company or agent and request a beneficiary designation form. Then send it back to the insurance company.

4

Provide support with your bank and brokerage accounts.

Most states allow you to designate loved ones and favorite causes to benefit from your bank account after your passing. In fact, this is one of the most straightforward ways to extend your support for our organization into the future. For the university to benefit from your checking account, savings account, or CDs, simply make them payable on death* to Mount Mary. To leave funds from your brokerage or investment accounts (including IRAs), you must place a transfer-on-death designation on them. Simply contact your bank representative or broker for instructions on how to complete this planned gift.

* State laws govern payable-on-death accounts and transfer-on-death accounts. Consult with your bank representative or investment advisor to consider these types of gifts.



EASY & AFFORDABLE WAYS TO GIVE BACK cont.



Any Percent Matters

Your gift does not have to be a specific amount. One solution is to donate a percentage of your estate instead. You may be surprised to find that even a small percentage can have a big impact for the students we serve.

GIVE A GIFT THAT ENDURES

When you extend your support of Mount Mary with a gift in your will or living trust or through a beneficiary designation gift, you join a visionary group of donors who have discovered the beauty of these powerful gifts. Along with the personal satisfaction of giving back, additional benefits include:



- **Flexibility.** You are free to alter your plans at any time.
- **Versatility.** You can structure your gift in different ways: a specific amount of money, a piece of property or a percentage of your estate (to ensure that your gift remains proportionate to your estate size).
- **Security.** You retain control over your assets should you need them during your lifetime. Also, with a gift from your residuary estate (what remains after specific gifts, taxes, debts and final expenses are satisfied), you can be sure that your loved ones receive what you intend before Mount Mary receives a gift.

The Power of the Pen

Beneficiary designations can be modified at any time to meet your changing needs. Your assets may never reach your intended recipients if you have failed to keep the beneficiary designations up to date. Experts suggest reviewing them every two to three years when you look over your entire estate plan.

Please contact us to learn more about planning a gift that works for your lifestyle and celebrates your connection to Mount Mary University.



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