

WE ALL DESIRE SIGNIFICANCE—TO LEAD HAPPY AND FULFILLED LIVES SURROUNDED BY FAMILY AND FRIENDS. FOR MANY OF US, THERE IS A NEED TO MAKE A DIFFERENCE—TO LEAVE A LASTING IMPACT ON THE PEOPLE MOST DEAR TO US AND THE WORLD IN WHICH WE LIVE.

Have you ever considered what kind of legacy you will leave? A bequest is the most tangible way to have a lasting impact on the people and organizations that mean the most to you. A bequest can be an effective way to support the work of Samford University for generations to come, allowing your impact to last far beyond your years on earth.

An Easy Gift to Make

A charitable bequest written in a will or trust directs a gift to be made to a qualified charity, such as Samford University, at your death. It allows you to “live beyond your years” through the long-lasting impact your gift will make on the lives of others who come behind you. With advanced planning, your family can also avoid paying income taxes on the assets they receive from your estate, and estate taxes may be avoided.

I have read your brochure and:

____ I would like to have a confidential discussion about my options.

____ I would like more information.

Name _____

Street _____

City _____

State/ZIP _____

Home Phone _____

Work Phone _____

Email _____

(Please complete and return. All inquiries are treated with complete confidentiality.)

Stan Davis, J.D. '78

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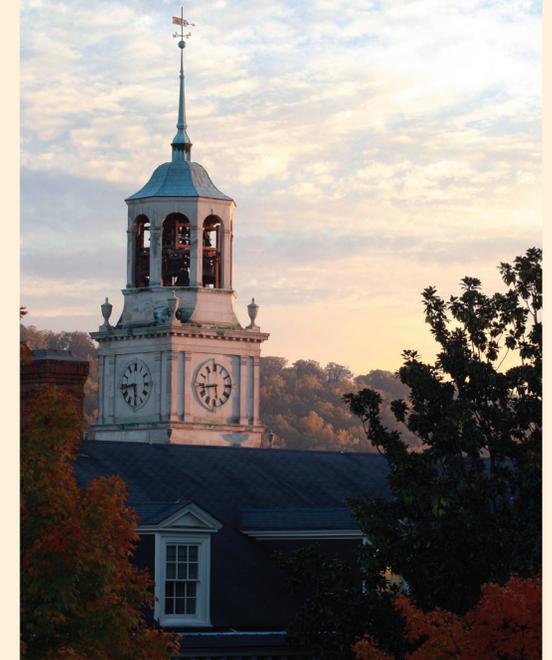
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What Legacy



Will You Leave?



An Intentional Legacy

Joe McDade is Alumni Advisory Board representative for the Class of 1961. Although he makes regular current gifts to Samford, he wanted to do more. He contacted Samford's Office of Gift and Estate Design and learned that he could start funding a scholarship during life and complete the funding through a bequest in his will. Joe now finds great satisfaction in asking family and friends to make gifts to his scholarship fund in lieu of giving personal items. He gets to experience the joy of giving and still have his assets available for his lifetime financial needs.

It's a simple, flexible way to leave a legacy by design, rather than by default.



What Legacy Will You Leave?

A bequest is one of the easiest gifts to make. With the help of an adviser, you can include language in your will or trust specifying a gift to be made to family, friends or even Samford University.

The most common types of a bequest are:

Percentage of your estate

Specific asset

Residue of your estate

Other Types of Bequests

Certain types of property bypass a will or trust and require that you name a beneficiary by completing a beneficiary designation form. To make a bequest of these assets, you should contact the company or entity from which you purchased the asset. Here are a couple of examples:

Bequest of an IRA

A retirement plan, such as an IRA, is a tax-smart way to make a bequest to Samford. If an IRA were given to family, much of the value would be depleted by income taxes. Designating Samford as beneficiary of part or all of the IRA allows the full value of the gift to be transferred income tax-free at your death. You can also leave an IRA to your spouse and designate Samford as secondary beneficiary. After your joint lives, the full value of the account will go to Samford. Contact your plan custodian for making an IRA bequest.

Bequest of Insurance Policy

If you have an insurance policy you no longer need, it can be an excellent and easy way to make a bequest to Samford. You may generally name anyone as beneficiary of your insurance policy and change your designation at anytime. Contact your insurance company to obtain a beneficiary designation form and make a bequest of your policy to Samford.

