

GIFT PLANNING GUIDE

Because of the many financial options that are both available to – and used by – supporters of Malone University, this document has been developed to make it possible for you to assess the best option(s) for your unique situation.

OUR PLEDGE TO YOU

As developmental officers for Malone University, we believe that God is our Provider. That makes any opportunity we have to assist you in planning for the future with a generous gift a spiritual matter. Your desire to make such a gift to Malone University is to be considered as a prompting of the Lord because in the Sermon on the Mount, Jesus discussed the material things that so many people worry about. Then He gave this promise, "...your Heavenly Father knows that you need them. But seek first His kingdom and His righteousness, and all these things will be given to you as well" (Matthew 6:32-33). What you give should bring you the joy of knowing that you are a conduit of God's provision. Our pledge to you is that is how we will pray and approach these discussions, and that what the Lord has placed in your heart to give is what we are committed to helping you fulfill.

ESTATE PLANNING OPTIONS

1) Bequest from a will or trust

- a) I/we will leave \$ _____ or _____% to Malone University from my/our will/trust.
- b) Potentially, this could be a value of \$ _____ for Malone University.
- c) The legal papers **are** or **will be** done (please circle one).
- d) My financial and legal advisors have been made aware of the **tools on Malone's website** that are most helpful on things like:
 - the legal and proper name of our institution,
 - the best wording to use in documents,
 - the advice about funds given from certain assets that can benefit my other heirs.
- e) **I am willing to share with Malone the will/trust** (or the essential sections of it) so that proper planning can be arranged on the receiving end.

2) A gift that also generates increased income and lower taxes

- a) I/We wish to leave funds for Malone University, but **I/we need to generate income** from those funds for now – an annuity that Malone can help me put in place.
- b) **I/We would like to meet with a planned giving officer** who can show us how that works. This means contacting Malone University's Office of Advancement at (330) 471-8281.

c) My financial and legal advisors have been made aware of the *tools on Malone's website* that defines the varieties of:

- charitable gift annuities
- charitable remainder unitrusts
- charitable lead trusts, and
- flip unitrusts

and how the array of our assets fit into such instruments. Assets such as:

- cash,
- real estate,
- personal property,
- stocks, bonds,
- retirement plans, and
- mutual funds

d) ***My/our home can be deeded to Malone and yet I can remain here*** for the rest of my/our live(s) under a Retained Life Estate. I/we would like to know more about this.

3) Gift Designations

a) I/we wish the gift(s) to be given would benefit Malone University (please circle i, ii, or iii):

- In a general way; let school leaders decide at the time where the greatest need is
- In a specific department or college of study; for me/us we want our gifts to especially benefit the _____ department/college.
- In the current **A Bolder Vision** capital campaign to benefit this focused area of need: _____.

b) I/we wish the gifts to be given would be endowed at Malone University as a/an (please circle i, ii, or iii):

- Scholarship with a minimum threshold gift of \$25,000; the design of this scholarship can be worked out with a development officer.
- Additional gift to an existing scholarship; this existing scholarship is known as the _____ Scholarship.
- Building and grounds fund, a chair in a particular department, sports facility, or other area within the university; this is to be explored with a development officer.

4) Questions I/We have

Our development officers can work with you or your financial and legal advisors to provide you the answers to your questions.