



GUIDE TO

Planned Giving

ALPHA SIGMA TAU FOUNDATION



Legacy Society

The Legacy Society celebrates individuals and families who support Alpha Sigma Tau with a documented planned gift of any percentage/dollar amount through the Foundation. Legacy Society members are publicly recognized and receive additional benefits.

Share Your Plans

If your will/estate plans include a gift to the Alpha Sigma Tau Foundation, please let us know. We want to make sure we understand your wishes and welcome you into the Legacy Society for Planned Giving.

Getting Started

It is never too early, or too late, to establish your charitable legacy. Gift planning is easier than you might think and is an important process for individuals and families.

With just a few steps, you can establish a plan that ensures your wishes are met and you and your heirs receive maximum benefits to enjoy your legacy today and in the future.

A planned gift is a contribution arranged in the present and allocated at a future date. Planned gifts are commonly donated through a will or trust but also include options that may offer you immediate benefits as the donor.

Wills and Bequests

A charitable bequest is one of the easiest ways you can leave a lasting impact on our Sisterhood.

Include language in your will or trust specifying a gift to be made to Alpha Sigma Tau Foundation as part of your estate plan, or make a bequest using a beneficiary designation form.

- Include a bequest to Alpha Sigma Tau Foundation in your will or trust
- Designate Alpha Sigma Tau Foundation as full, partial, or contingent beneficiary of your retirement account
- Name the Alpha Sigma Tau Foundation as a beneficiary of your life insurance policy

The bequest may be designated in the following ways using the sample language provided:

• Specific/Make a gift of a specific dollar amount

I give and devise to the Alpha Sigma Tau Foundation (Tax ID #63-0862852), located in Indianapolis, IN, the sum of \$_____ (or asset) to be used for its general support (or the support of a specific fund or program).

• Residual/Make a gift from the remaining balance or residue of your estate after other obligations have been met

I give and devise to the Alpha Sigma Tau Foundation (Tax ID #63-0862852), located in Indianapolis, IN, all (or state a percentage) of the rest, residue, and remainder of my estate, both in real and personal, to be used for its general support (or the support of a specific fund or program).

• Contingent/Make a gift only if one or more of your specific bequests cannot be fulfilled

If (insert name) is not living at the time of my demise, I give and devise to the Alpha Sigma Tau National Foundation (Tax ID #63-0862852), located in Indianapolis, IN, the sum of \$_____ (or a percentage of the residue of my estate) to be used for its general support (or the support of a specific fund or program).

Gifts That Produce Income

Charitable Gift Annuity

Transfer your cash or appreciated property to the Alpha Sigma Tau Foundation in exchange for our promise to pay you and/or a beneficiary a fixed income for the rest of your life.

Charitable Unitrust/Annuity Trust

Transfer your cash or appreciated property to fund a charitable trust. The trust will then sell your property tax-free and provide you with income for the remainder of your life or a set term of years.

Assets as Planned Gifts

- **Stocks and Bonds**
- **Real Estate**
- **Retirement Assets**
Donating part or all of your unused retirement assets such as a gift from your IRA, 401(k), 403(b), pension or other tax-deferred plan.
- **Cash**
- **Life Insurance**
If you have a life insurance policy that has outlasted its original purpose, consider making a gift of your insurance policy. For example, you may have purchased a policy to provide for minor children and they are now financially independent adults.

Qualified Charitable Distributions

If you are 70 ½ or older and have an Individual Retirement Account (IRA) you may be eligible to make a qualified charitable distribution (QCD). A QCD counts towards your Required Minimum Distribution (RMD) for the year and reduces your taxable income.

Plan Your Giving By:

Giving Amount

Under \$25,000

- Outright Gift of Cash
- Outright Gift of Appreciated Securities
- Donor Advised Fund
- Gift in Your Will or Living Trust
- Charitable Gift Annuity
- Beneficiary Designations

\$25,000 to \$99,999

- Outright Gift of Cash
- Outright Gift of Appreciated Securities
- Donor Advised Fund
- Gift in Your Will or Living Trust
- Charitable Gift Annuity
- Beneficiary Designations

\$100,000 to \$999,999

- Outright Gift of Appreciated Securities
- Gift in Your Will or Living Trust
- Beneficiary Designations
- Charitable Gift Annuity
- Outright Gift of Life Insurance
- Charitable Remainder Trust
- Charitable Lead Trust

\$1 million +

- Outright Gift of Appreciated Securities
- Gift in Your Will or Living Trust
- Beneficiary Designations
- Charitable Remainder Trust
- Charitable Lead Trust

Age

Under 40

- Outright Gift of Cash
- Outright Gift of Appreciated Securities
- Donor Advised Fund
- Gift in Your Will or Living Trust
- Beneficiary Designations

40-54

- Outright Gift of Cash
- Outright Gift of Appreciated Securities
- Donor Advised Fund
- Gift in Your Will or Living Trust
- Beneficiary Designations

55-69

- Outright Gift of Appreciated Securities
- Gift in Your Will or Living Trust
- Charitable Gift Annuity
- Beneficiary Designations
- Charitable Remainder Trust
- Charitable Lead Trust

70 +

- Outright Gift of Appreciated Securities
- Gift in Your Will or Living Trust
- Charitable Gift Annuity
- Beneficiary Designations
- Make a Gift Tax-Free with an IRA
- Outright Gift of Life Insurance
- Charitable Remainder Trust
- Charitable Lead Trust

Gift Type

Cash

- Outright Gift of Cash
- Gift in Your Will or Living Trust
- Charitable Gift Annuity
- Donor Advised Fund
- Charitable Remainder Trust
- Charitable Lead Trust

Appreciated Securities

- Outright Gift of Appreciated Securities
- Gift in Your Will or Living Trust
- Charitable Gift Annuity
- Donor Advised Fund
- Charitable Remainder Trust
- Charitable Lead Trust

Retirement Plan Assets

- Beneficiary Designations
- Make a Gift Tax-Free with an IRA
- Charitable Remainder Trust
- Donor Advised Fund

Life Insurance

- Beneficiary Designations
- Outright Gift of Life Insurance

Personal Property

- Outright Gift or Sale at Reduced "Bargain" Price
- Gift in Your Will or Living Trust
- Charitable Gift Annuity
- Charitable Remainder Trust

Please consult your tax and financial advisors when considering any planned gift.



Planning for Your Alpha Sigma Tau Badge



Each member of Alpha Sigma Tau Sorority makes a **lifetime lease of the Badge** from the Sorority during the Alpha Sigma Tau Sorority Initiation Ritual Ceremony.

It is the policy of the Sorority that the Badge is either buried with a member when she enters Eternal Chapter or shall revert to Alpha Sigma Tau National Sorority through the Alpha Sigma Tau National Headquarters to be held for a future family member who may join the Sorority or archived, depending upon the member's wishes."

- Badge Policy, Alpha Sigma Tau Policy & Position Statements (2008)

Documenting your final plans for your Sorority Badge and artifacts ensures your loved ones know your wishes and helps them uphold the promises you made to our dear old Alpha Sigma Tau. By outlining your desires in your will and final wishes, you may rest easy knowing these important items will be cared for in the most appropriate way.

Please consider including the following language when drafting your legacy plans and final wishes:

It is my final wish that my Alpha Sigma Tau Badge be buried with me when I enter the Eternal Chapter.

Please also send my most important Sorority artifacts {list specific items} to Alpha Sigma Tau Headquarters as a lasting legacy of my membership.

My Alpha Sigma Tau Badge should be held in safekeeping for my potential future Legacy {name, if applicable}/ displayed in the Sorority archives in perpetuity.

Upon my entrance to the Eternal Chapter, it is my wish to have my Alpha Sigma Tau Badge returned to Sorority Headquarters in Indianapolis, IN.

Contact Us

Alpha Sigma Tau National Foundation
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The Alpha Sigma Tau National Foundation is a 501(c)3 nonprofit (EIN #63-0862852). Contributions are tax-deductible to the fullest extent allowed by law.