



The *Legacy* of Psi Upsilon

Build Upon Your Generosity

Make a Future Gift to Psi Upsilon

Many of us routinely write checks to important causes that are close to our hearts. By doing so, we see the benefits of our generosity firsthand.

Giving every year helps Psi Upsilon meet its most immediate, pressing needs. On the other hand, when you make a future gift, you ensure the success of Psi Upsilon for generations to come.

Here are a few options to consider:

Remember Psi U in your will or living trust. You can leave the Foundation either a specific amount or a percentage of your estate.

A gift of retirement plan assets. Retirement plans make up a large portion of our wealth. Consider naming The Psi Upsilon Foundation as a beneficiary of all or part of your assets. Simply request a change-of-beneficiary form from your plan administrator.

A gift of a life insurance policy. Select The Psi Upsilon Foundation as the beneficiary of a policy you no longer need.

With a little planning, these solutions help ensure that our programs continue to benefit Psi U brothers well into the future. Plus, making a future gift is an affordable way to provide support to our mission, regardless of your income or estate size.



Omega brothers at its 100th anniversary celebration. Your bequest ensures Psi U is here 100 years from now.



Support a Cause That Matters

To learn more about supplementing annual support with a future gift to The Psi Upsilon Foundation, contact **Mark Williams** at (317) 571-1833, Ext. 101, or maw@psiu.org to discuss how you can leave a gift to Psi Upsilon in your estate plan.

5 Giving Strategies Made Easy for You Pre- and Post-Retirement

When Is the Best Time to Provide Charitable Support?

Retirement brings the opportunity to relax and enjoy the things you never had time for during your working years. It's also a perfect opportunity to support one of your favorite causes, such as Psi Upsilon. Review the chart below to discover five giving options.

5 Charitable Solutions for You

Type of Gift	How It Works	When to Set Up the Gift
Cash	Write a check or charge a credit card.	Anytime Tax breaks can help you each year (if you itemize).
Securities	Give appreciated securities owned for longer than one year, and receive an income tax charitable deduction when you itemize, eliminating tax on the gain since you purchased the securities.	Anytime Consider this gift whenever long-term capital gains taxes are an issue.
Gift in your will or trust	Leave a specific amount or percentage of your estate to The Psi Upsilon Foundation through your will or living trust.	Anytime You can change the gift as your life circumstances require.
Retirement plan assets	Name Psi U as primary or contingent beneficiary of part or all of your retirement plan assets.	Anytime This tax-heavy asset makes a great charitable gift after your lifetime.
Charitable lead trust	Fund a trust that provides payments to the Foundation for a term of years, with the balance going to your family.	After Retirement This trust is an excellent estate planning tool for high net worth estates seeking to minimize taxes.



Are Charitable Gifts a Part of Your Plan?

Contact Mark Williams at (317) 571-1833, Ext. 101, or maw@psiu.org for more information about donation options that put your retirement plan assets to good use while supporting Psi Upsilon.



Alumni at the 2016 Convention. Your bequest will allow Psi U to fulfill its educational mission.

Create a Lasting Legacy

When you create a will, you gain peace of mind knowing that you're protecting the important people in your life. You can also use your will to invest in the causes that are close to your heart and create a permanent testament to the values that are important to you.

By leaving a gift to The Psi Upsilon Foundation in your will, you ensure that we can continue to carry out our mission and create lasting improvements that benefit Psi Upsilon for years to come.

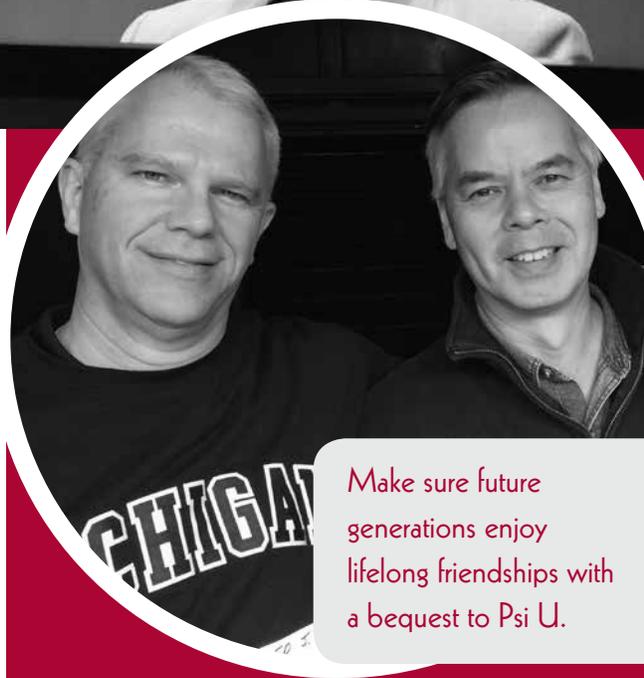
A Worry-Free Way to Support Psi Upsilon

We all want to make a difference in the lives of others, but the future can be unpredictable. That's why including a gift in your will is the perfect way to support Psi Upsilon. Because you're not giving away any assets until after your lifetime, you're free to alter your plans if your circumstances change. This way you ensure that you and your family have the resources you need now and that Psi Upsilon has the support we need in the future.

Make a Permanent Impact

Including The Psi Upsilon Foundation in your will is an easy process. Here's how it works:

1. Ask your estate planning attorney to use our official language, right, when you create your will. If you already have a will, simply ask your attorney to amend the existing document to complete your gift.
2. Once your gift is in place, let us know. It would be our honor to thank you for your foresight and ensure that your gift is used as you intend.
3. Contact Mark Williams at (317) 571-1833, Ext. 101, with any questions you may have about making this type of gift.



Make sure future generations enjoy lifelong friendships with a bequest to Psi U.

PUT IT IN *Writing*

If you are ready to include a gift to The Psi Upsilon Foundation in your will, ask your estate planning attorney to add this suggested wording to your will or living trust:

I give to The Psi Upsilon Foundation, Indianapolis, Indiana, (the sum of \$ _____ or _____ percent of the rest, residue and remainder of my estate) for its general purposes.



The Schoepflin Society

Named for Paul H. Schoepflin, Pi '12 (Syracuse University), the Schoepflin Society recognizes members and friends who have made a planned gift to The Psi Upsilon Foundation. Brother Schoepflin's bequest resulted in a gift of more than \$700,000 to the Foundation. The following members have indicated their estate plans include a bequest to The Psi Upsilon Foundation, have signed a statement of such an intent, or have filed a copy of the relevant portion of their estate document with the Foundation:

Thomas T. Allan, IV, Theta Theta '89
Mark D. Bauer, Omega '83
John E. Boccaccio, Phi '75
James S. Bradley, Tau '63
J. Martin Brayboy, Gamma '84
Joan R. Brewster, Gamma '86
David H. Brogan, Epsilon Nu '56
David A. B. Brown, Epsilon Phi '66
John F. Bush, Psi '56—Upsilon
Joseph P. Cillo, Delta '61
Joseph N. Di Nunno, Gamma Tau '80
Murray L. Eskenazi, Lambda '56

Gerald P. Gehman, Omega '61
The Estate of A. Price Gehrke, Pi-Tau '43
LCDR John Gray USN (Ret.), Psi '37
Charles M. Hall, Nu Alpha-Gamma Tau '71
Charles J. Harriman, Beta Beta '43
Edward O. Harris II, Epsilon Nu '62
Christopher W. L. Hart, Chi '72
James E. Heerin Jr., Tau '58
Douglas R. Jung, Tau '73
John D. Kay, Delta '78
Andrew M. Kerstein, Delta '76
Kevin A. Klock, Chi Delta '01

Jack Lageschulte, Epsilon Omega '59
Thomas A. Leghorn, Delta '76
William McPherson V, Phi '71
Richard E. Meese, Phi '78
Robert S. Petersen, Omicron '68
Richard A. Rasmussen, Upsilon '72
Gregory P. Rupp, Phi '81
Ralph E. Steffan, Tau/Iota '51
Samuel J. Tinaglia, Omega '88
Edgar H. Vant Jr., Chi '57
Mark A. Williams, Phi '76
William N. Wishard III, Delta Delta '64

For more information, contact President and CEO Mark A. Williams at (317) 571-1833, Ext. 101.



For more information, call or write:

Mark A. Williams, Phi '76 ♦ President and CEO

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Visit our website at www.psiu.org.