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Through the Society of 1819, the College thanks those visionary donors who honor our proud heritage and who are helping to build the foundation for our future by including the College in their estate plans.

I am daily inspired and humbled by the generosity of our alumni and friends. On behalf of the students, faculty, and staff of Maryville College, thank you for helping to sustain and grow this special place.

Thank you for your interest in joining the Society of 1819.

Sincerely,

WILLIAM T. “TOM” BOGART, PRESIDENT

To plan your gift or inquire about the Society of 1819, please write, call, or email:

Office of Planned Giving
Maryville College
502 E. Lamar Alexander Pkwy
Maryville, TN 37804
(865) 981-8204
marsha.wynn@maryvillecollege.edu
www.maryvillecollege.edu/giving

“I would not be where I am today without Maryville College. I will do everything I can to give similar opportunities to future MC students.”

Ed Smith, Ph.D. ’67

“I am a member of the Society of 1819 because it gives me the opportunity to give more and have a greater impact that I would have ever thought possible.”

Al Baker ’72

I would like more information about the following giving options:

- Bequest
- Charitable Gift Annuity
- Charitable Remainder Trust
- Charitable Lead Trust
- Life Insurance
- IRA Charitable Rollover
- Other: ______________________

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WAYS TO GIVE

Charitable Bequest
You can include a charitable bequest in your will or trust. A charitable bequest is not subject to estate or inheritance taxes, so it may significantly reduce the tax burden of your estate.

Charitable Gift Annuity
You can establish a charitable gift annuity by making a gift to Maryville College in exchange for receiving a fixed annual dollar amount for life. The remainder will benefit Maryville College. You get a federal income tax deduction for the projected charitable remainder value of your gift, and capital gains taxes will be significantly reduced on appreciated property.

Charitable Remainder Trust
You can transfer cash or property into a trust. The trust income goes to named beneficiaries and the remainder will go to Maryville College. You get a federal income tax deduction for the projected charitable remainder value, and there are no capital gains taxes when the trust property is sold.

Charitable Lead Trust
A charitable lead trust is like a charitable remainder trust, but in reverse. Trust income goes to MC with the remainder going to heirs with reduced or no gift or estate taxes.

Life Insurance
You may donate a paid-up policy, or create a new policy with MC as owner and beneficiary, or give a policy that is not fully paid up and take a tax deduction for the present value of the policy. Any subsequent premium payments will be tax deductible.

Individual Retirement Account Charitable Rollover
If you are at least 70 1/2 years old, you can give directly from your IRA to Maryville College and pay no taxes on the disbursement.

SAMPLE BEQUEST LANGUAGE

Below is language that you can review with your attorney when discussing your will or trust.

Unrestricted Gift
I give to Maryville College in Maryville, Tennessee the sum of $_________ (or _____ percent of my estate; or the property described herein) for its general purposes.

Restricted Gift
I give to Maryville College in Maryville, Tennessee the sum of $_________ (or _____ percent of my estate; or the property described herein) for the use and benefit of its __________ (e.g. History Department; or to endow the John and Mary Smith Endowed Scholarship Fund with preference for students majoring in Biology).

Residuary Gift
All the rest, residue, and remainder of my estate, both real and personal, I give to Maryville College in Maryville, Tennessee for its general purposes (or describe a specific purpose).

Contingency Gift
I devise and bequeath the residue of the property owned by me at my death, real and personal, and wherever situated, to my husband (or wife), __________, if he (or she) survives me. If my husband (or wife) does not survive me, I devise and bequeath my residuary estate to Maryville College in Maryville, Tennessee for its general purposes (or describe a specific purpose).