



Help Students With Your Support

You likely reflect often on the year at hand, but do you spend much time envisioning the future? A solid estate plan is a critical component to protect your family after you're gone. It's also a tool to make a meaningful, lasting difference for Regis students and it can offer financial benefits.

How an Estate Gift Benefits You

Depending on the gift arrangement you choose, you can:

- Reduce your income taxes.
- Reduce or eliminate capital gains tax.
- Defer your gift until after your lifetime, so it doesn't affect current income.
- Give more—and create a greater impact—than you ever thought possible.

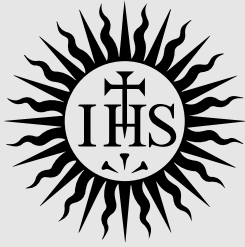
Take Note

To qualify for a tax benefit in 2019 (when you itemize deductions on your income tax return), you must make your gift by Dec. 31. The date used for tax purposes is the day you transfer control of the asset. Here are gift dates by type.

- **Checks**—The mailing date is the date of the gift.
- **Securities**—If securities are electronically transferred to Regis University, the gift date is typically the day the securities enter our account. If stock transfers are mailed, the mailing date is the gift date.
- **Life insurance**—The date signed on paperwork transferring ownership to the University, assuming you properly forward the form to the insurance company.
- **Artwork and other tangible personal property**—The day you deliver the property with a signed document transferring ownership, if necessary.

Every Gift Makes a Difference

Your gift, in any amount, advances our Jesuit, Catholic education. Contact the Office of Estate and Gift Planning at 800.388.2366 ext. 5152 or giftplanning@regis.edu to learn more about gift options and the best tax-saving strategy for you.



The St. Ignatius of Loyola Society

Named for the founder of the Jesuit Order, the St. Ignatius of Loyola Society is composed of Regis University's loyal alumni, faculty, staff, and friends who have included the University in their estate plan. By naming Regis as a beneficiary in their will, trust, or other estate plan, this special group of men and women in service of others are helping to ensure that we maintain our standard of excellence for future generations of students and continue to fulfill our Jesuit, Catholic mission to educate men and women of all ages to make a positive impact in a rapidly changing global society.

The St. Ignatius of Loyola Society honors the generous commitment of these special members of our Regis University family. To join, please contact the Office of Estate and Gift Planning at 800.388.2366 ext. 5152 or giftplanning@regis.edu.

Help Students Achieve Their Dreams

You can change lives and help Regis University students achieve their dreams. How? By establishing a scholarship or contributing to an existing scholarship fund.

College education can come at a high cost, so the dream of earning a degree may be out of reach for deserving students. A scholarship helps ease the financial burden students face.

A Flexible Way to Give

When you create a scholarship at Regis with a gift from your estate, you can tailor it to represent your values. We will work with you to establish the criteria for scholarship recipients and the type of support you want your scholarship to provide.

Some things to consider:

- Will the scholarship support full- or part-time students?
- Does the student need to be an undergraduate or graduate student?
- Will it provide full or partial support to the recipient?
- Can it be used to purchase books, or will it cover tuition costs only?
- Will the scholarship be awarded based on merit, need, or both?

You can also name your scholarship. This is a heartfelt way to honor a loved one or someone who had a significant impact on your life.

The Impact of a Scholarship

When you give the gift of a scholarship, you:

- Put a quality education within reach of deserving students.
- Reward students for their hard work and dedication.
- Help Regis attract and retain top students and faculty.
- Make an impact on a student's life.

You can change a life with a gift that establishes or contributes to a scholarship. To get started, contact the Office of Estate and Gift Planning at 800.388.2366 ext. 5152 or giftplanning@regis.edu.



Reap the Rewards of Your IRA

For years, you've faithfully saved for retirement. However, what once worked in your favor—putting money into your IRA and enjoying tax savings—will change when you begin withdrawing funds. That's because you pay income taxes on the amount you withdraw from your IRA. Here are a few ideas on how you can get the most from your IRA and your support of Regis University.

If you're at least 59½ or older, you can take a distribution from your IRA and then make a gift without penalty. If you itemize your deductions, you can take a charitable deduction for the amount of your gift.

If you're 70½ or older, you can give any amount up to \$100,000 each year from your IRA directly to the University or another qualified charitable organization without having to pay income taxes on the gift. Your gift can satisfy all or part of your required minimum distribution and you'll see the impact of your generosity today.

No matter your age, you can designate Regis as the beneficiary of all or a percentage of your IRA. As a tax-exempt organization, we receive your gift tax-free.

If you choose to name the University as beneficiary, follow these simple steps to complete your gift:

- Contact your IRA administrator for a change-of-beneficiary form, or simply download a form from your provider's website.
- Name Regis and the gift percentage. Return the form to your administrator.
- Let us know! We want to ensure that your charitable intent is carried out.

To learn more about how you can use your IRA to minimize taxable income while investing in students, contact the Office of Estate and Gift Planning at 800.388.2366 ext. 5152 or giftplanning@regis.edu to get started. We would be happy to help!

How to Teach Children to Give

The greatest gift we can pass down to the next generation is the value of giving back. Showing loved ones that we are part of a larger world—and what we put into it is what we get out—ensures the next generation understands the importance of philanthropy.

By talking with family members now about your charitable goals and engaging in acts of service, you become a role model and inspire others to follow your lead.

Start the Conversation

Set aside time or use everyday moments to talk about what it means to be charitable.

- Share your philanthropic goals for Regis University and other nonprofits you are passionate about.
- Ask family members which causes are important to them and how they show support.
- Request that your family consider their role in your own charitable giving plans.

Take the Next Step

Discuss taking your commitment to the next level.

- Consider volunteering on campus, if opportunities are available, or giving your time to other University programs or services.
- Start charitable family traditions.

Solidify Your Plans

Discuss ways to fulfill your philanthropic aspirations for Regis or other nonprofits.

- Contact us to inquire about volunteering or other ways you can help.
- Leverage your estate plan to carry out your charitable wishes beyond your lifetime.

For more ideas about how to engage younger generations in the act of philanthropy, contact the Office of Estate and Gift Planning at 800.388.2366 ext. 5152 or giftplanning@regis.edu.

Nurture the Giving Spirit

Do Good, Together

Volunteering as a family cultivates closeness while helping others; it also develops empathy, gratitude, and responsibility.

Get Them Involved

Children can help walk dogs or put clothing into bags to donate; simple acts build the foundation of giving.

Donate Goods or Money

Let children see you in the act of giving away clothing or writing a check; doing is the best motivator.



Share Your Story

We all have a set of values and beliefs that guide our lives. Make sure your loved ones are aware of those principles, including your philanthropic intentions, by creating a legacy letter. Our complimentary guide *7 Questions to Help Build Your Legacy* can help you get started. Request your copy using the enclosed reply card.



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