

# REGIS UNIVERSITY

## Leaving a Family Legacy: Frank H. Stapleton, Jr.

As he looks back on life, Frank H. Stapleton, Jr., often reflects on the opportunity his Regis University education afforded him. As a non-traditional student, Frank received his MBA in 1989, and he hasn't forgotten the impact the school made on his life.

"My gift is from the heart and for the memory of what my parents did for me," he says, noting that his father died when he was just 11 and his mother sacrificed so he and his brother could go to school and on to college.

After receiving a BA '65 in Managerial Economics from Fort Lewis College, Frank entered the active Army serving for four years, including Vietnam. In 1971, he began working for a federal agency, retiring in 1996. Concurrently, he served in the Army National Guard and Army Reserve for 24 years, retiring as a Colonel in 1994. All this with the unyielding support of his mother.

"As you grow older you get to thinking of the past, and you begin wondering what are the next steps," Frank, 77, says of deciding to leave a legacy to Regis in the form of a gift in his will, also known as

a bequest. Frank continues to be involved at Regis through the St. Ignatius of Loyola Society, Crest Club, and Center for the Study of

War Experience. The veteran says honoring his parents was a main consideration when deciding to leave a gift to Regis University.

"I met a lot of very special people at Regis, and I would like to see the progress of Regis go forward," Frank says of his endowment gift. "I want to be a part of the great education experience Regis offers to its students."



Frank H. Stapleton, Jr.

### Give From the Heart

Like Frank, you can remember someone special by including a gift in your will or other estate plan in that person's honor. Contact Abigail Palsic at the Office of Estate and Gift Planning at 800.388.2366 ext. 5152 or [giftplanning@regis.edu](mailto:giftplanning@regis.edu) to learn more.



## 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 is helping to ensure that we maintain our standard of excellence for future generations of students. Society members also help fulfill our Jesuit, Catholic mission to educate men and women of all ages and encourage them 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 Abigail Palsic at the Office of Estate and Gift Planning at 800.388.2366 ext. 5152 or [giftplanning@regis.edu](mailto:giftplanning@regis.edu).

# The Impact of a Scholarship

Providing the best experience for our students—from best-in-class professors to fast-changing technology—requires a growing budget. Also growing? The need for financial aid. Grants, loans, and part-time jobs are common ways to offset the costs of getting a college degree, but an even better option is a scholarship.

Scholarships help give students of all income levels access to an affordable Regis University education. Because they lessen the debt a student carries after college, they also serve as an investment in their future.

Scholarships help cover the cost of tuition, books, and general living expenses so students can focus on what really matters—their education. And when you establish a scholarship at Regis through a gift in your estate plan, you help secure access for future students, as well.

## Ways to Fund a Scholarship

There are two easy ways\* to fund a scholarship: with an annual or an endowed gift.

1

An annual gift is spent within the year the gift is received. It directly and immediately provides students with financial assistance during that school year. You can fund this type of gift in many ways: by donating cash or appreciated stock or designating a gift in your will or living trust, for instance.

2

An endowed gift gives in perpetuity. Regis takes your one-time, lump-sum gift and invests it, using a portion each year to assist students.

\*Each option offers unique tax benefits, so make sure you work with a trusted financial advisor to explore the details.



## The Gift That Keeps on Giving

Learn more about creating an endowment or scholarship in honor of someone special with our FREE guide **Create a Lasting Tribute for Someone You Love or Admire**. Simply return the enclosed reply card to receive your copy today.



# Feel Good About Giving

## Get Security in Return

There's a way for you to do more for Regis University than you ever imagined. By establishing a gift that pays you income, known as a charitable gift annuity (CGA), you can create a secure future—for you and Regis. Follow these four steps:

### STEP 1: Determine which assets to donate.

You can fund your charitable gift annuity in many ways: cash, appreciated securities, or other assets. When you make your gift, you qualify for a partial income tax charitable deduction and receive partially income tax-free payments throughout your anticipated life expectancy. If you fund your gift using securities, you receive an additional benefit of eliminating a portion of the capital gains tax on the gift. The balance is reportable over this same period of time.

### STEP 2: Decide who will receive the payments.

A CGA provides you with payments you cannot outlive. You can also choose to add an additional person. This is typically your spouse but can be another adult you choose, such as a parent or friend.

### STEP 3: Choose your payment date.

You can choose to start receiving your payments right away or defer them until a later date. Deferring your payments benefits you by increasing your annual payout as well as your income tax charitable deduction.

### STEP 4: Get a personalized illustration.

After deciding your assets, payment recipients, and payment date, request a personalized illustration, at no obligation, using the enclosed reply card. This illustration will show what payments you can expect to receive, your potential tax benefits, and the impact you can make on Regis.

## Your Payments Won't Change

When you give through a CGA, you can have peace of mind knowing the amount you'll receive each year will not change regardless of the state of the economy. Based on your age at the time of your gift, your payment amount will not fluctuate based on market values.

### One Life

Age	Rate
65	4.2%
70	4.7%
75	5.4%
80	6.5%
85	7.6%
90+	8.6%

**California residents:** Annuities are subject to regulation by the State of California. Payments under such agreements, however, are not protected or otherwise guaranteed by any government agency or the California Life and Health Insurance Guarantee Association. **Oklahoma residents:** A charitable gift annuity is not regulated by the Oklahoma Insurance Department and is not protected by a guaranty association affiliated with the Oklahoma Insurance Department. **South Dakota residents:** Charitable gift annuities are not regulated by and are not under the jurisdiction of the South Dakota Division of Insurance.



# Facing the Future Together

Make a Big Difference Now and in the Years Ahead

Now, more than ever, your generosity is an encouragement to our students. The long-term support of friends like you helps us weather challenges like those we are facing as a result of the COVID-19 pandemic and provides vital resources we need to meet the changing needs of our students, whether on campus or at home.

You may be wondering what else you can do to help us get through this uncertain time. One way to make a lasting difference is by combining a current gift with a future gift to Regis University. This thoughtful approach to giving allows you to continue to see the impact of your support today and be part of helping us address tomorrow's challenges.

Blending your giving today with a future gift lets you make a bigger impact than you ever thought possible. You have the flexibility to choose the combination of gifts that complement your financial situation and the future needs of you and your loved ones.

## Popular Ways to Make a Difference Today



**CASH**



**SECURITIES**



**REAL ESTATE**



**DONOR ADVISED FUNDS**

## Simple Ways to Extend Your Impact



**RETIREMENT PLAN ASSETS**



**LIFE INSURANCE**



**BANK OR BROKERAGE ACCOUNTS**



**WILL OR TRUST**

We are here to help if you have any questions about how you can make a greater difference for Regis students. Please feel free to contact us today.



## Your Benefits

- Increase the impact of your giving.
- Preserve wealth for you and your family.
- Enjoy greater tax savings.
- See the results of your giving today.

**Tell us about your gift! It would be our honor to thank you for your support. Plus, your generosity can inspire others to follow your example.**



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