



**HERITAGE**  
S O C I E T Y

*A Legacy of Giving*

**QUINCY**  
UNIVERSITY



# HERITAGE

S O C I E T Y

**THE HERITAGE SOCIETY** honors our thoughtful and generous alumni and friends who have included Quincy University in their estate plans.

The tradition of loyalty, shown through these commitments of support, is important in strengthening and sustaining the University's future.

We invite you to join this exclusive society of caring individuals by creating a provision to benefit QU in your estate plans.





## *Choose the option that matches your goals.*

### **Bequest**

- ***Your Goal*** – Defer a gift until after your lifetime
- ***How to Make the Gift*** – Name us in your will or trust. Designate a specific amount, specific asset, percent of the total, or share of the remainder.
- ***Your Benefits*** – Gift exempt from federal estate tax. Control your assets for your lifetime.

### **Gift of Retirement Assets**

- ***Your Goal*** – Avoid estate and income tax on IRAs, 401(K)s, and other employee benefit plans.
- ***How to Make the Gift*** – Name us beneficiary of the remainder of the assets after your lifetime.
- ***Your Benefits*** – Make your gift from the most highly taxed assets, leaving other assets for family.

### **Gift of Life Insurance**

- ***Your Goal*** – Make a large gift with little cost to yourself.
- ***How to Make the Gift*** – Name us the owner or beneficiary of all or part of a life insurance policy.
- ***Your Benefits*** – Current income tax deduction. Possible future deductions through gifts to pay policy premium.

### **Retained Life Estate**

- ***Your Goal*** – Give a personal residence, vacation home or farm now, but continue to live there.
- ***How to Make the Gift*** – Designate ownership of your home to us, but retain occupancy.
- ***Your Benefits*** – Valuable charitable income tax deduction. Lifetime use of residence.

*For more information visit  
[www.quincy.edu/gift-planning](http://www.quincy.edu/gift-planning)*

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# Heritage Society Membership



Yes, I want to become a member of the Heritage Society of Quincy University.

I have provided for the University in the following way:

I have included a bequest to the University in my will or living trust. It provides for a bequest of \$ \_\_\_\_\_ (optional)

I have named the University as a beneficiary of a retirement account. The approximate value of this bequest is \$ \_\_\_\_\_ (optional)

I have named the University owner or beneficiary of a life insurance policy. It provides for a bequest of \$ \_\_\_\_\_ (optional)

I have provided for the University in the following way, not listed above. It provides for a bequest of \$ \_\_\_\_\_ (optional)

Please specify details \_\_\_\_\_

It is my intent to provide Quincy University with funds from my estate plans for the following purpose: To insure accuracy, I am enclosing the relevant estate document.

Please specify purpose \_\_\_\_\_

Yes, I give Quincy University permission to publish my name in its list of Heritage Society members. I understand that the amount of my intended gift will not be published.

I prefer that my name appear in the University's Honor Roll of Donors as follows:

Please Print \_\_\_\_\_

Name \_\_\_\_\_ Class Year (if alum) \_\_\_\_\_

Signature \_\_\_\_\_

Spouse Name \_\_\_\_\_ Class Year (if alum) \_\_\_\_\_

Signature \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Cell \_\_\_\_\_

E-Mail \_\_\_\_\_

Thank you, and please forward to:

## QUINCY UNIVERSITY

### Office of University Advancement

1800 College Ave • Quincy, IL 62301-2699

Phone (217) 228-5227 • Fax (217) 228-5656

advancement@quincy.edu

www.quincy.edu/gift-planning