

STRATEGIES FOR GIVING



Create
your
legacy.



EMORY

OXFORD
COLLEGE



A LETTER FROM THE DEAN

Oxford College is a one-of-a-kind educational experience. As the new dean, I've already found Oxford to be a tightknit community full of ambitious and service-minded students, as well as faculty and staff members dedicated to seeing our scholars flourish both in and beyond the classroom.

Emory's core mission to create, preserve, teach, and apply knowledge in service to the world is alive and well here at Oxford—the birthplace of our historic university. Oxford's focus on a personalized liberal arts education continues to cultivate creativity, intellectual curiosity, and essential critical thinking skills in the leaders of tomorrow.

With your support, Oxford is positioned as a destination for students who share these values. By including Oxford in your estate plans, you can ensure a lasting legacy—one that provides our students with tools that will help them make a positive impact in their communities around the world.

Badia Ahad

Dean, Oxford College of Emory University

An invitation to join the 1836 Society



In 1836, a college that would one day become one of the nation's premier institutions of higher learning, research, and health care was founded. Today, the 1836 Society honors the legacy of those founders by recognizing individuals whose dedication and wise planning will strengthen Oxford College for generations to come.

We invite you to become a member of the 1836 Society by creating your legacy at Oxford through a gift from your estate. The generosity of 1836 Society members is evident throughout Emory and Oxford College. It has endowed professorships and scholarships, funded research, erected buildings, and expanded excellence in health care.

**"OXFORD IS A SPECIAL PLACE THAT
HAD A PROFOUNDLY POSITIVE IMPACT
ON MY LIFE BOTH PERSONALLY
AND PROFESSIONALLY,
WHICH IS WHY MY
BEQUEST NURTURES AND
SUPPORTS LEADERSHIP
OPPORTUNITIES FOR
OXFORD STUDENTS."**



Hugh Tarbutton Jr. 84Ox is a longtime member and former chair of Oxford College's Board of Counselors. Through his gifts and bequests, he has created and funded the Tarbutton Leadership Fellows Endowment to support the cultivation of current and future leaders at Oxford College.



GIFT PLANNING AT OXFORD COLLEGE

We make it easy.

Oxford College of Emory University depends upon the goodwill of alumni and friends who share our vision to continue to strengthen and advance programs. There are many ways to make an impact in the program or initiative that is important to you. We understand that the process of planning your estate can seem overwhelming, but it needn't be difficult. Planning typically involves qualified and trusted professionals, such as your attorney and financial adviser as well as the dedicated staff in the Emory Office of Gift Planning.

Our professionals have the experience to work with you and your advisers to create a plan that meets both your financial and philanthropic goals. Gift planning can even provide an opportunity to stretch beyond what you think is possible.

The following pages will give you an overview of available gift planning options. We are happy to answer your questions and provide more information as it relates to your individual interests.

Whatever the size of your estate, it is important to have a plan.

CONTACT US

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“I WOULD LIKE TO PROVIDE
THE SAME OPPORTUNITY
DOWN THE ROAD FOR
OXFORD STUDENTS, SO THEY
CAN RUN WITH IT.”



Scholarship funds meant that **Paul P. Jackson Jr. 82Ox 84B** could attend Oxford College and receive an education outside his home state of Florida. The gift changed his life. Much later, when he needed to name a life insurance beneficiary, Paul and his wife, **Tami Puckett**, decided to designate Oxford College, seizing the opportunity to provide scholarship funds to future students.



Invest in what matters to you.

SCHOLARSHIPS

Scholarships reduce the financial barrier many students face when pursuing a high-quality education. By easing this burden for students and their families, scholarships help bring the best and brightest to Oxford, strengthening a close-knit community known for its leadership, service, and integrity.

FACULTY

A strong faculty is the cornerstone of a great university, and estate gifts that support faculty members—through endowed chairs, professorships, awards, research funding, and many other avenues—help Oxford recruit and retain scholars and teachers who are leaders in their fields.

UNRESTRICTED SUPPORT

By making an unrestricted estate gift, you provide funding that allows Oxford College to address its greatest priorities at the time your legacy gift is realized. Unrestricted funding helps Oxford cover unforeseen needs and invest in new opportunities.



“KNOWLEDGE CREATES OPTIONS TO
DO WHAT YOU WANT IN THE WORLD.
I WANT TO MAKE SURE WE’RE
SHARING THESE OPPORTUNITIES
WITH THOSE LESS FORTUNATE
THAN OURSELVES.”



Munir Meghjani 08Ox 10C is a former president of the Emory Alumni Board. To create opportunities for tomorrow’s students, he has designated Oxford as a beneficiary of his 401(k) and life insurance policy.



WAYS TO GIVE

Bequests

By naming Oxford College of Emory University as a beneficiary of your estate, you are investing in current and future scholars, innovative liberal arts, great teaching, and signature programs in the context of Oxford's warm community and commitment to student leadership.

When you make a bequest to Oxford, you continue to control your assets during your lifetime so that you make sure your current needs are met. You can modify your bequest if your circumstances change. A well-designed plan can result in a lower estate tax, allowing you to leave more for loved ones.

If you already have included Oxford College in your estate plans, please let us know. We would like to thank you and welcome you into the 1836 Society. Sharing your plans does not obligate you or your estate in any way; it simply helps us understand your intentions and make sure your gift is ultimately directed and used as you intend.



SAMPLE BEQUEST LANGUAGE

"I hereby give, devise, and bequeath to Emory University, an educational institution in Atlanta, Georgia, for the benefit of Oxford College, the sum of \$____ (or ____ percent of my net estate, or the following described property, or the rest and residue of my estate after payment of the foregoing bequests), for its general purposes."

For restricted gifts to Oxford College or for named endowment funds, please contact the Office of Gift Planning for recommended language. Alternatively, our gift agreement document can capture these specific designations.



“OXFORD COLLEGE PREPARED
ME FOR EMORY AND FOR
ANYTHING THAT LIFE WOULD
THROW AT ME.”



Chris Arrendale 99Ox 01C is a former president of the Oxford College Alumni Board and a former member of the Emory Alumni Board.

Amanda Arrendale is currently a member of Oxford's Board of Counselors. The Arrendales' unrestricted estate gift will help meet Oxford's most pressing needs.



WAYS TO GIVE

Retirement plans

Naming Oxford College as a beneficiary of your IRA or other qualified retirement plan is a tax-effective way to support the program at Oxford that means the most to you. At your death, the assets held in your retirement plan may be subject to both estate and income taxes, reducing the value received by your heirs. Because of Emory's tax-exempt status, these gifts avoid both potential taxes.

The process of naming Oxford College a beneficiary of your retirement plan is simple. Contact your plan administrator and complete a beneficiary designation form, including a spousal waiver if needed. In some cases, you may be able to complete the form online. This quick change is an easy way for you to make a meaningful impact. If you have already named Oxford a beneficiary of your retirement plan, please let us know so we may clearly document your intentions to benefit Oxford, acknowledge your generosity, and welcome you to the 1836 Society.



A SIMPLE WAY TO MAKE A TAX-WISE GIFT

"I designate that upon my death (or the death of my spouse), \$____ or ____% of my IRA (or other qualified retirement plan) account be distributed to Emory University, an educational institution in Atlanta, Georgia, for the benefit of Oxford College."

For restricted gifts to specific designations or for named endowment funds, please contact the Office of Gift Planning for recommended language.



“OXFORD IS THE PLACE
WHERE I FOUND MYSELF,
AND I AM A BETTER PERSON
BECAUSE OF IT.”



Michael Silverio 98Ox 00C is a former president of the Oxford College Alumni Board. Passionate about Oxford College, he has designated Oxford as the partial beneficiary of his 401(k) retirement plan.



WAYS TO GIVE

IRA charitable rollover

The IRA charitable rollover is a simple and tax-effective way to support Oxford College.

- If you are 70½ or older, you can give up to \$100,000 each year directly from your IRA to charities such as Oxford.
- The transfer generates neither taxable income nor a tax deduction, so you still benefit even if you do not itemize your tax deductions.
- When you reach age 72, your IRA charitable rollover gift can satisfy all or part of your required minimum distribution for the year.
- The transfer may be made in addition to any other charitable giving you have planned.


To initiate a gift, instruct your IRA administrator to transfer funds directly to Oxford. Emory's Office of Gift Planning will answer your questions and provide instructions for completing your gift.



EMORY UNIVERSITY is a single not-for-profit corporation that includes Oxford College, Emory College, and Emory's libraries, centers, graduate and professional schools, Michael C. Carlos Museum, and health care system.

Emory's tax identification number is 58-0566256.

You can support Oxford College or any of the programs or schools at Emory by directing your gift to Emory University for the benefit of the area that aligns with your interest.



"OUR LEGACY BEGINS WITH THE CONTRIBUTIONS THAT OUR FIVE CHILDREN WILL MAKE BECAUSE OF THEIR OXFORD EXPERIENCE. IT CONTINUES WITH OUR REGULAR GIVING TO ONGOING PROJECTS AND ENDOWMENTS AND HAS ITS CAPSTONE IN OUR FINAL BEQUESTS."



Art Vinson 66Ox 68C is a member of the Emory Alumni Presidents' Club and Oxford Board of Counselors, where he previously served as chairman. All five of his children are Oxford alumni. Art and his wife, **Laurie Vinson**, have designated Oxford as the beneficiary of a life insurance policy.



WAYS TO GIVE

Life insurance

Life insurance is frequently overlooked as an asset that can be used for charitable gift planning. If you have more insurance coverage than you need, you may consider giving Oxford College a paid-up policy. By transferring the ownership of your policy to Oxford, you receive a charitable income tax deduction equal to the policy's cash surrender value or cost basis, whichever is less.

You can also name Oxford as the sole or partial primary beneficiary of an existing policy. Simply contact your insurance company or financial institution and request a change-of-beneficiary form. Because you retain ownership of the policy, you have the right to change the beneficiary designations any time you wish.



“FOR ME, THIS GIFT IS
ABOUT GIVING OTHERS
THE OPPORTUNITY TO HAVE THE
EXPERIENCES I DID.”



Jennifer Crabb Kyles 98Ox 00C,
a former president and a former member of the
Oxford College Alumni Board, has designated
Oxford as a beneficiary of her life insurance
policy so that financial constraints do not prevent
deserving students from receiving the life-changing
opportunity she experienced.



WAYS TO GIVE

Real estate and private assets

Real estate is the single most valuable asset many people own. Making a gift of marketable real estate to Oxford College can provide you with significant tax benefits while helping you fulfill your philanthropic goals. When you make an outright gift of your property to Oxford, you will receive a charitable tax deduction based on its current fair market value. Appreciated real estate also can be a favorable asset for funding a charitable remainder trust. Prior approval of the Emory Board of Trustees is required for all outright gifts of real estate.

Private assets—such as limited partnership, C corporations, and limited liability company interests—also make excellent gifts to Oxford and may qualify you for a charitable tax deduction. Please call the Office of Gift Planning to discuss your options.



PROTECT YOUR INVESTMENT GAINS

Gifts of appreciated property, such as securities or real estate, generate a **triple tax benefit**. You receive a charitable income tax deduction for the full market value of the property, avoid paying capital gains tax on the appreciation, and remove the asset from your estate for estate tax purposes.



“INCLUDING OXFORD COLLEGE
IN MY WILL HELPS ENSURE
THAT OTHERS HAVE THE SAME
GREAT OXFORD COLLEGE
EXPERIENCE THAT I HAD.”



Brian J. Friedman 97Ox 99C is a member of the Oxford Alumni Board, and he has designated a significant portion of his estate to Oxford College. His legacy will benefit students and the Oxford community for years to come.



WAYS TO GIVE

Charitable gift annuities

Charitable gift annuities are simple contracts between you and Oxford College of Emory University that provide you, and a second individual if you choose, with income for the rest of your life and direct future support to the programs at Oxford that are most meaningful to you. A gift annuity can be established with a minimum of \$10,000 and may be funded with cash or appreciated securities. These agreements do not need to be drafted by an attorney but rather are set up with the help of the experts in the Office of Gift Planning.

The amount of the annual annuity payment depends on the age or ages of the income beneficiaries. Payments can start right away or can be deferred to a set time you choose—at age 65 or at retirement, for example. You receive a charitable income tax deduction in the year the gift annuity is established, and a portion of the annual payments may be tax free. You can feel confident that your income stream will continue for life as it is secured by all of Emory's assets.

Funds remaining in the gift annuity at the death of the final income beneficiary are distributed to Oxford College as you specified when the annuity was established.

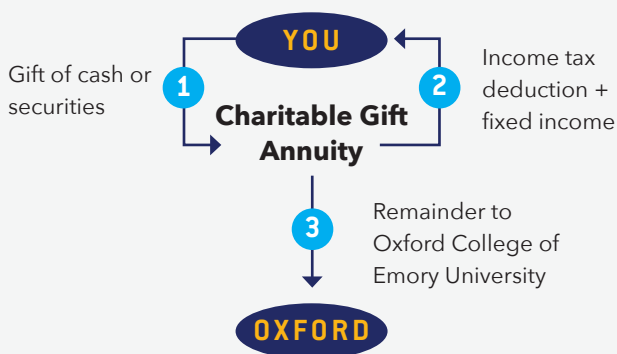
HOW IT WORKS

- 1** You transfer cash or securities to Oxford College of Emory University.
- 2** You receive an income tax deduction and may avoid capital gains tax. Emory pays a fixed amount each year to you or someone you name for life. Typically, a portion of these payments is tax free.
- 3** At the death of the last income beneficiary, the remaining principal passes to Oxford.

“WE WANT TO MAKE SURE THESE
BUILDINGS REMAIN PART OF
THE CAMPUS COMMUNITY.”



Warren Brook 70Ox 72B served on the Oxford College Alumni Board for more than 20 years, represented Oxford on the Emory Alumni Board, and is currently a member of the Oxford College Board of Counselors. Warren and **Kathy Brook** value history and love architecture, and their bequest to the college will create an endowment to help preserve Oxford's many historic buildings.



WAYS TO GIVE

Charitable remainder trusts

Charitable remainder trusts are flexible and tax-wise vehicles that can provide you and your loved ones with income and create a generous remainder gift to fund the programs and initiatives at Oxford College that are important to you.

A charitable remainder trust is drafted by an attorney and may be established during your lifetime or at your death. These trusts offer a great deal of flexibility. You may choose the payout rate (typically between 5 and 7 percent), income may be fixed or variable, a variety of asset types can be used for funding the trust, and there is no limit to the number of income beneficiaries named. You receive a charitable tax deduction in the year the trust is established, and capital gains tax on the contributed asset is deferred. At the end of the trust's term, remaining funds will support your Oxford legacy.

Your choice of a charitable remainder trust will provide you with added income while transforming lives at Oxford College.



Any of the following assets can be used to fund a charitable remainder trust at Oxford:

- Cash
- Stocks, bonds, and mutual funds
- Real estate
- Closely held stock
- Business interests
- Tangible personal property





Gift plans at a glance

	Bequest	Retirement plan assets
Reduce income tax		✓
Reduce estate tax	✓	✓
Reduce capital gains tax		
Current income		
Fund with cash	✓	✓
Fund with appreciated securities	✓	
Fund with real estate	✓	
Fund with personal property	✓	



IRA rollover	Life insurance	Charitable gift annuity	Charitable remainder trust	Outright gift of appreciated property
✓	✓	✓	✓	✓
✓	✓	✓	✓	✓
		✓	✓	✓
		✓	✓	
✓	✓	✓	✓	
		✓	✓	✓
			✓	✓
			✓	✓





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The information in this brochure is not intended as legal advice.

Please consult your attorney about the applicability to your own situation of the legal principles contained herein.