



**YOUR LEGACY.**  
THEIR FUTURE.



Regis College

# Join the Catherine Burke Society and leave a legacy that will change lives.

Planned gifts provide a unique opportunity for donors to give back to Regis while receiving great tax benefits or income. Membership in the Catherine Burke Society is extended to those who notify Regis of their intent and have provided documentation of a planned gift. If Regis is included in your plans, please let us know.

## **TYPES OF PLANNED GIFTS**

- › Charitable Bequest: Gifts through your Estate
  - › Wills and Living Trusts
  - › Beneficiary Designations
- › Charitable Gift Annuity
- › Charitable Remainder Trust

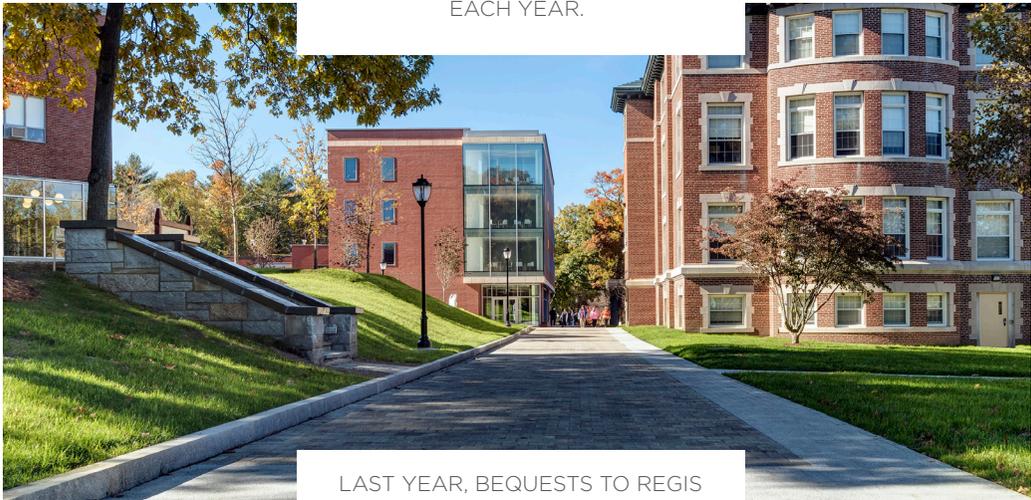
An alumna of Regis' first graduating class, Catherine Burke '31 designated Regis as a beneficiary in her will. Since 1997, her bequest has supported the education of more than 1,000 students and because the funds are endowed, it will continue to do so in perpetuity. The Catherine Burke Society acknowledges and celebrates alumni and friends who, like Catherine, demonstrate their deep commitment to Regis by including the university in their estate plans or through another type of planned gift.





Bequests cost a donor nothing during his or her lifetime, and the bequest intention is eligible to be counted toward current Regis campaigns and a class or reunion gift.

ON AVERAGE, APPROXIMATELY **\$1 MILLION** IS COMMITTED TO REGIS BY PLANNED GIVING DONORS EACH YEAR.



LAST YEAR, BEQUESTS TO REGIS TOTALLED MORE THAN **\$700,000**, WHICH PROVIDED SCHOLARSHIPS, FINANCIAL AID, AND OTHER RESOURCES TO REGIS STUDENTS.

A charitable gift annuity provides a donor(s) with a significant charitable tax deduction as well as an income stream for life. The donor(s) can also elect to defer payments if desired.



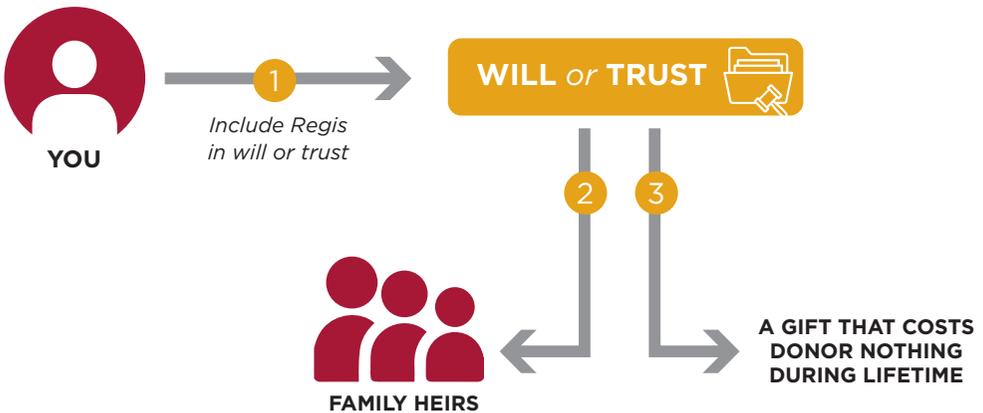
# GIFTS MADE THROUGH YOUR ESTATE

## Adding Regis to your Will

You can make a bequest to Regis by including language in your will or living trust that designates a specific amount, a percentage of your estate, or all or a portion of what is left after you have made bequests to your family. You may include Regis by creating a new will or adding a codicil to your present will.

### Sample Bequest Language in a Will

*"I give (the sum of \$\_\_\_\_) (the following described property :\_\_\_\_\_ ) to Regis College, a non-profit corporation of the State of Massachusetts, to be used to further its purposes as the Board of Trustees in their discretion may deem appropriate."*



## Beneficiary Designations

You can name Regis as a charitable beneficiary of your assets—including retirement plans, life insurance policies, donor-advised funds, or bank accounts—by completing a form that is separate from your will and can be changed any time without an attorney. Unlike a beneficiary gift to family members, this type of gift to Regis is tax-exempt.

# Julia Jones

Class of 2018

Catherine Burke Scholar

Major & Minor

Biology | Chemistry

Hometown

Revere, MA



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“As a first-generation graduate, funding my college career was always a stressful thought. I was blessed and forever grateful to receive several scholarships, including the Catherine Burke Scholarship. My scholarships allowed me to pursue a diverse education and prepare for medical school in a place that truly became my home. Regis was the foundation of my growth, my comfort, my success, my happiness, and my future.”

## Estate Gift Facts

- › A bequest costs you nothing during your lifetime and ensures opportunities are available to future Regis generations.
- › You retain control of and use of assets during your lifetime.
- › You may modify the bequest at any time if circumstances change.
- › Gifts to Regis from your estate are exempt from federal estate taxes.
- › If eligible, the full designated amount can count toward current campaigns and class gifts.

**LEARN MORE** [alumni.regiscollege.edu/bequests](https://alumni.regiscollege.edu/bequests)



# Barbara Bagley

Class of 1970

**Donor & Member**

Catherine Burke Society

Higgins Society

1927 Society

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“Regis is near and dear to me and has been in my will for years. Providing documentation to officially join the Catherine Burke Society during my 50th Reunion year was simple. I made this planned gift, and continue to give annually, because I see that Regis is expanding, thriving, and making a huge difference in so many lives—just as it did for me. There is nothing more important than supporting higher education so all the potential and talent that exists in young people can be explored and encouraged and realized to its fullest extent.”

## Charitable Annuity Facts

- › A CGA guarantees you an income stream for life.
- › You receive partial tax-free income.
- › In the year of the gift, you receive a significant charitable deduction.
- › Reduce capital gains tax by funding a CGA with appreciated stock.

**LEARN MORE** [alumni.regiscollege.edu/cga](https://alumni.regiscollege.edu/cga)

# GIFTS THAT PROVIDE INCOME

## Charitable Gift Annuity

A charitable gift annuity is an agreement that allows you to make a gift to Regis while receiving income and tax benefits. In exchange for an outright gift, Regis pays a fixed dollar amount each year to you and/or another beneficiary for life. The amount of the annual payments is determined based on the age(s) of the income recipient(s) and IRS discount rate at the time the gift is made.

- › **Deferred Gift Annuity:** If you are younger than 60 or don't need your payments immediately, you can set up a deferred gift annuity. This allows you make your gift and receive a tax deduction, but delay receiving annuity payments until a later date of your choice, such as when you reach retirement.

**EXAMPLE:** *Mary, age 85, sets up a \$100,000 charitable gift annuity with Regis. The current rate based on her age is 8.0%\*, which means Mary's gift will provide her with annual payments of \$8,000. Mary will get a significant federal income tax charitable deduction in the year of the gift.*

## Charitable Remainder Trust

A charitable remainder trust provides you or other named individuals income each year for life (or a period not exceeding 20 years) from assets in the trust. There are two ways to receive payments and each has its own benefits:

- › **Annuity Trust:** An annuity trust pays you the same amount each year, which you choose at the beginning. Your payments stay the same regardless of fluctuations in trust investments.
- › **Unitrust:** A unitrust pays you a variable amount each year based on a fixed percentage of the fair market value of the trust assets. If the value of the trust increases, so do your payments, and vice versa.

Learn more about your planned giving options through the **Catherine Burke Society** by visiting our website and contact us directly to request your complimentary life-income illustration.

**[alumni.regiscollege.edu/burkesociety](http://alumni.regiscollege.edu/burkesociety)**

For more information or to make a gift, please contact:

EMAIL: **[advancement@regiscollege.edu](mailto:advancement@regiscollege.edu)**

PHONE: **781.768.7220**

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