THERE ARE MANY WAYS TO BECOME A 1746 Society Member
There are many ways you can make a gift that will cost you nothing today. Other gift plans can provide retirement income for you or loved ones, or can help pass assets to the next generation. You can support Princeton’s mission and join the 1746 Society by:

- including Princeton in your will
- naming Princeton as a beneficiary of an IRA, retirement plan, insurance policy, or bank account
- creating a charitable trust or charitable gift annuity
- if approaching your 50th reunion or higher, making an Annual Giving Legacy gift to benefit your class

When you make a planned gift to Princeton, your generosity has an impact far into the future. Your gift supports generations of students whose lives will be forever changed by their Princeton experience.
PLANNED GIFTS HELP
KEEP PRINCETON ON THE
WORLD’S CENTER STAGE
Princeton offers many ways to reach your financial and philanthropic goals, as well as expert advice to help you find the right balance.

<table>
<thead>
<tr>
<th>YOUR GOAL</th>
<th>YOUR STRATEGY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’m almost 65. I want to have enough for my retirement and give a gift to Princeton, too.</td>
<td>Charitable Gift Annuity*</td>
<td>A gift that provides income for life and leaves a remainder for Princeton.</td>
</tr>
<tr>
<td>I have appreciated stock that pays me a dividend. How can I make a gift to Princeton and continue to receive an income during my life?</td>
<td>Charitable Remainder Trust*</td>
<td>A gift that provides income for life or a specific term and leaves the remainder to Princeton.</td>
</tr>
<tr>
<td>I want to make a gift to Princeton, but I am also concerned about providing for my heirs and the impact of gift or estate tax.</td>
<td>Charitable Lead Trust*</td>
<td>A gift that provides for Princeton for a specific term while benefitting your heirs.</td>
</tr>
<tr>
<td>I’d like to make a gift to Princeton that costs me nothing now.</td>
<td>Bequest -or- Beneficiary designation</td>
<td>Include Princeton in your will or as a beneficiary of a life insurance policy, IRA, retirement plan, outside trust or bank account.</td>
</tr>
</tbody>
</table>

*May be eligible for Annual Giving class credit
<table>
<thead>
<tr>
<th>YOUR INCOME</th>
<th>YOUR BENEFITS</th>
<th>MINIMUM GIFT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed payments when gift is established</td>
<td>Fast and easy to set up</td>
<td>$25,000</td>
</tr>
<tr>
<td>Remainder is a gift to Princeton</td>
<td>Payments guaranteed and partially tax-free</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reduces your taxable estate in most cases</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Capital gains taxes reduced and/or deferred</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Charitable deduction on federal income tax</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Gift can be designated to support Princeton priorities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Expert investment and administration</td>
<td></td>
</tr>
<tr>
<td>Unitrust payments vary depending on investment performance</td>
<td>Payments may be higher than stock dividends</td>
<td>$100,000</td>
</tr>
<tr>
<td>Remainder is a gift to Princeton</td>
<td>Can add to a unitrust at any time</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reduces your taxable estate in most cases</td>
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<tr>
<td></td>
<td>Expert investment and administration at much lower fees than commercial managers</td>
<td></td>
</tr>
<tr>
<td>Income to Princeton during term of the trust and assets to you or your heirs thereafter</td>
<td>Federal gift/estate tax or income tax deduction</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>You control the timing and distribution of assets</td>
<td>May reduce taxable estate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Gift can be designated to support Princeton priorities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Expert investment and administration at much lower fees than commercial managers</td>
<td></td>
</tr>
<tr>
<td>Not applicable</td>
<td>Easy to do and costs nothing now</td>
<td>Any Amount</td>
</tr>
<tr>
<td></td>
<td>Can be a percentage of your estate or a specific amount</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reduces your taxable estate in most cases</td>
<td></td>
</tr>
<tr>
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</tr>
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</table>
When you include Princeton in your estate plan or create a life income gift, you become a member of the University’s 1746 Society. The society is named in honor of the year the University was founded.

Benefits of 1746 Society Membership

- A permanent legacy at Princeton
- Reports on the investment performance of gifts to Princeton and highlights of the gift planning program
- Professional, personalized gift planning services
- Invitations to members-only events
- Recognition in select Princeton publications, with your permission
- Option to be an anonymous member if you do not want your membership publicly recognized
Help your class achieve an Annual Giving record. Major reunions beginning with the 50th are eligible for the Annual Giving Legacy program. Through a charitable gift annuity or charitable trust of $100,000 or more, you can provide income for yourself and/or a beneficiary and support Princeton in perpetuity through your class’s Annual Giving endowment or as an endowment fund in your name.

“Our Princeton years had an enduring impact on our lives. By making an Annual Giving Legacy gift, we are honoring that impact and extending it forward to future Princetonians.”

—KATHY MOLONY ’71 AND RICHARD HOLLINGSWORTH ’71

...FORWARD TOGETHER WITH YOUR CLASS AND INTO YOUR FUTURE
Consider a **charitable gift annuity** or **charitable remainder trust** to diversify your portfolio, increase your income, reduce or defer capital gains tax, and provide a federal income tax charitable deduction while supporting Princeton.

“We created two charitable remainder trusts to be used by the University to meet its highest funding needs at the time the money becomes available because the University’s priorities are our priorities. We want to leave a legacy, both personal and institutional.”

—JAMES POSNER *70

...LOCK IN FUTURE FUNDS FOR YOU AND **PRINCETON**
A bequest is a gift that comes to Princeton after your lifetime through your will. Direct a specific dollar amount or assets to the University, or direct all or a percentage of the remainder of your estate after your other beneficiaries have received their inheritances and estate-related expenses have been paid.

No will is necessary to designate the University as a beneficiary of your IRA, retirement plan, life insurance or bank account. You continue to take regular withdrawals during your lifetime; afterwards the funds pass to Princeton free of taxes. If your family’s needs change, the beneficiary designation to Princeton can be changed.
### GIFTS THAT COST NOTHING TODAY

- The following bequest language can be used in your will: *I give and bequeath to the Trustees of Princeton University, a New Jersey not-for-profit corporation, the sum of __________ Dollars (or all the rest, residue, and remainder of my estate) to be used for the purposes of the University at the discretion of its Board of Trustees.*

- The University’s tax ID number (EIN) is 21-0634501.

Our address and contact information for estates and trusts is:

Office of the General Counsel
Princeton University
New South Building, Fourth Floor
Princeton, NJ 08544
609.258.2500

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### GIFTS THAT PAY YOU AN INCOME

- A **Deferred Charitable Gift Annuity** (DCGA) is another way to provide yourself and/or your beneficiaries with an income stream. Starting at age 55, DCGAs may be established with rates set for future payments; payments can begin as early as age 65.

- If your 50th — or 55th, 60th, 65th, 70th or more — reunion is on the horizon, receive Annual Giving major reunion class credit for life income gifts through Princeton’s **Annual Giving Legacy program**. Gifts made in the form of a charitable remainder unitrust (fluctuating income) or a charitable gift annuity (fixed income) are eligible for AG class credit.

Learn more about life income gifts

[https://giving.princeton.edu/giftplanning/life-income-gifts](https://giving.princeton.edu/giftplanning/life-income-gifts)
We invite you to join the 1746 Society and to recognize the contributions of William Ho ’87 and Victoria Baum Bjorklund ’73.

To become a member of the 1746 Society, name Princeton in your estate plan. Please complete the following.

My birthdate is:

Birthdate of another income beneficiary:

Gift amount for illustration only: $  

Note: If gift amount is left blank, we generally use $100,000 for initial illustrations.

From

[Name and class year]

 YES, I have named Princeton in my estate plan and
 I would like to be enrolled in the 1746 Society.

 YES, I have made a gift to Princeton.

 YES, I have repeated my information on the return envelope.

Phone

Email:

Email address

Print mail:

Address

City, state, zip

Please detach, fold, and seal your reply card. U.S. mail or scan to 1746soc@princeton.edu. Thank you for your interest in making a special gift to Princeton.

William Ho ’87 and Victoria Baum Bjorklund ’73 have made special commitments to Princeton by will or other planned gifts.

Victoria Baum Bjorklund ’73 named Princeton a beneficiary of her (401)k plan.

We invite you to join the 1746 Society and be recognized along with Victoria Baum Bjorklund ’73 and William Ho ’87 who have made special commitments to Princeton by will or other planned gifts.

CONFIDENTIAL REPLY

I prefer to receive information by:

 email
 U.S. mail
 both

Email:

Email address

Print mail:

Address

City, state, zip

Phone

Please detach, fold and seal for your privacy, return by U.S. mail, or scan to 1746Soc@princeton.edu. Thank you for your interest in making a special gift to Princeton!