

## **1962 Legacy Society**

Legacy gifts, also known as planned gifts, can be among the most transformative gifts received by a university. Planned giving is a perfect complement to a tradition of lifetime annual giving. Many planned gifts offer tax-efficient and flexible ways to extend your philanthropy into the future.

The NIU Foundation (NIUF) 1962 Legacy Society is a recognition society that honors and celebrates alumni, allies and friends who have made a commitment to support the National Intelligence University (NIU) through a planned, or deferred, gift. These future gifts contribute to the growth and success of NIU, and they will benefit future generations of NIU students and faculty.

### **How to Join**

To be eligible for membership in the 1962 Legacy Society, simply notify the NIUF (Tax ID # 45-2763650) in writing that you arranged any one of the following gifts to benefit the National Intelligence University:

- A bequest in your will or revocable trust
- A beneficiary designation for your retirement plan assets
- A beneficiary designation on a life insurance policy
- A life income gift that names the NIUF as a remainder beneficiary (for example, a charitable remainder annuity trust, or a charitable remainder unitrust)
- A charitable lead trust that provides payments to the NIUF for your lifetime or a term of years.

Qualifying gifts may be revocable or irrevocable, for any amount, and for either restricted use (such as an endowment) or unrestricted use.

If you have already included the NIUF in a bequest or other planned gift, we hope you will let us know by filling out a non-binding Statement of Intent to Provide Future Support.

### **Benefits of Membership**

Members of the 1962 Legacy Society receive a certificate of membership, and member names will be listed in NIUF publications. Members also receive invitations to return to the NIU campus for lectures or events.

Your willingness to let the NIUF include your name in NIUF publications inspires others to follow your example, but we respect those who wish their names to remain anonymous. Even if you prefer anonymity, please let us know of your plans on a confidential basis so that we may more properly plan for the future and honor your wishes for your legacy. Please note that letting the NIUF know of your current plans does not obligate you, your estate or your heirs in any way.

For additional information, please contact:

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**The NIU Foundation does not provide legal or tax advice. We recommend that you seek your own legal and tax advice in connection with gift and planning matters. To ensure compliance with certain IRS requirements, we disclose to you that this communication (including any attachments) is not intended or written to be used, and cannot be used, for the purpose of avoiding tax-related penalties.**