

Class of 1976 Golden Reunion

Legacy Giving Opportunities & Multi-Year Pledges

To ensure proper crediting of your tax-deductible gift, please return this form with your payment.

1776 ★ 1976 ★ 2026

OTTERBEIN  ★
CLASS OF 1976  ★

★ **50TH GOLDEN REUNION** ★
A LEGACY WORTH DECLARING

All gifts and pledges received before December 31, 2026, of your Golden Reunion Year will count toward your class Golden Reunion Legacy gift total. Pledges may be paid off over three years.

Name(s): _____ Class Yr. _____ Spouse Yr. _____
(if applicable)

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Email: _____

Enclosed is my/our gift of \$ _____ for the Otterbein Class of 1976 Legacy Gift.

Giving Levels:

\$100 - \$999

The Golden Level

\$2,027 - \$4,999

The Liberty Bell Level

\$1,000 - \$1,775

The Bicentennial Level

\$5,000+

The Founders Circle Level

\$1,776 - \$2,026

The Declaration Level*

**Signature Class Giving Amount!*

Please make checks payable to Otterbein University.

I/We would like to make a gift of \$ _____ by credit card: Visa MC Discover American Express

Card # _____ CID# _____ Exp. Date: _____

Please choose from:

Charge my account for entire amount now.

Charge my account \$ _____ per month for _____ months.

Please designate my/our gift to support (you may choose more than one):

The Class of 1976 Legacy Gift — which will support the Otterbein READY Program (www.otterbein.edu/READY).

Otterbein Fund

Other: _____

I/We would like to establish an endowed scholarship (minimum is \$25,000, achieved within five years).

If you have a preference for how your total gift is divided (i.e. 50% to Legacy Gift and 50% to Otterbein Fund), please let us know here: _____

Payment Time Frame and Reminders:

Gifts can be paid over three years. If you would like to choose this option, please let us know when you would like us to send reminders: annually monthly quarterly other: _____

Please send me more information on:

Making a Bequest to Otterbein

IRA Charitable Rollover

Charitable Gift Annuity* (CGA) Receive guaranteed income while making a gift to Otterbein!

A gift related to my Required Minimum Distribution - RMD

Please contact Kathleen Bonte at 614.823.2707 or kbonte@otterbein.edu for any questions.

*CGA available for Ohio residents only, contact us for more information.

Matching Gifts can double or triple your gift! Please check with your and/or your significant other's personnel office to find out if your employer will match your gift, and then obtain the necessary form to forward to our office.

Matching gift company: _____ Form enclosed Form will follow

Otterbein University is a charitable 501(c) (3) organization.

The EIN or Tax ID# is 31-4379532.

You can donate by:

- **Online:** Visit www.otterbein.edu/give to make your gift safely and securely. Under "Designation", scroll down and select "1976 Class Gift".
- **By Mail:** Please complete this pledge form and send to Otterbein University, Attn: Office of Philanthropy, 1 S. Grove Street, Westerville, OH 43081 in the envelope provided.
- **By Phone:** To donate/pledge by credit card, please contact the Philanthropy Services Office at Otterbein at (614) 823-1400 or for multi-year pledges reach Kathleen Bonte at (614) 823-2707.

You may also want to consider the following giving options:

- **Gifts of Stock, Mutual Funds, and/or Securities:**

Gifts of appreciated stock can hold significant financial benefits for you, while fulfilling your philanthropic goals. Giving stock eliminates the capital gains tax that would otherwise be due had the stock been sold. Additionally, you are eligible for a charitable income tax deduction of the full fair market value of the stock, rather than the purchase price. For more information about a stock gift, call Tracy Rush, Executive Director of Philanthropy Services, at (614) 823-1290 or email trush@otterbein.edu.

- **Qualified Charitable Distribution:**

A QCD is a direct transfer of funds from your IRA, payable directly to a qualified charity such as Otterbein, as described in the QCD provision in the Internal Revenue Code. Amounts distributed as a QCD can be counted toward satisfying your RMD (Required Minimum Distribution) for the year, up to \$111,000 in 2026. The QCD is excluded from your taxable income. This is not the case with a regular withdrawal from an IRA, even if you use the money to make a charitable contribution later on. If you take a withdrawal, the funds would be counted as taxable income even if you later offset that income with the charitable contribution deduction.

Why is this distinction important? If you take the RMD as income, instead of as a QCD, your RMD will count as taxable income. This additional taxable income may push you into a higher tax bracket and may also reduce your eligibility for certain tax credits and deductions. To eliminate or reduce the impact of RMD income, charitably inclined alumni may want to consider making a qualified charitable distribution (QCD). For example, your taxable income helps determine the amount of your Social Security benefits that are subject to taxes. Keeping your taxable income level lower may also help reduce your potential exposure to the Medicare surtax. As always, please consult your financial advisor for more information. *(Portions of the QCD information were made available by Fidelity Investing)*

- **Charitable Remainder Annuity Trust:**

A charitable remainder annuity trust can give you stability by allowing you to receive fixed payments while still helping Otterbein. It pays a fixed amount each year based on the value of the property at the time the trust is funded. Here's how it works: You transfer cash or assets to fund a charitable remainder unitrust. In the case of a trust funded with appreciated assets, the trust will then sell the assets tax-free. Then, the trust is invested to pay fixed income to you or any other trust beneficiaries you select based on a life, lives or a term of up to 20 years. You then receive an income tax deduction in the year you transfer assets to the trust. Otterbein would benefit from what remains in the trust after all the trust payments have been made.

Here's the overall benefits of this planned giving option (*Charitable annuity available for Ohio residents only):

- Receive fixed income for life or a term of up to 20 years.
- Avoid capital gains tax on the sale of your appreciated assets.
- Receive an immediate charitable income tax deduction.

For more information on any of these planned giving options to support Otterbein, please contact Kathleen Bonte, Executive Director of Philanthropy & Planned Giving, at kbonte@otterbein.edu or (614) 823-2707.