

Class of 1976 Golden Reunion

Legacy Giving Opportunities & Multi-Year Pledges

1776 ★ 1976 ★ 2026

OTTERBEIN  ★
CLASS OF 1976  ★

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

All gifts, pledges, and bequests (regardless of designation) will count toward your Class of 1976 Golden Reunion Legacy Gift total, if documented and received by 12/31/26.

The Class of 1976 Legacy Gift is striving to support the **Otterbein READY Program**, a four-year, experiential career preparation curriculum designed to ensure every student develops professional skills, builds a network, and completes at least one immersive experience — such as internships, research, or study abroad — before graduation. To learn more, visit www.otterbein.edu/READY.

Name(s): _____ Class Year(s): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Email: _____

Giving Levels:

- | | |
|-------------------|--|
| \$100 - \$999 | The Golden Level |
| \$1,000 - \$1,775 | The Bicentennial Level |
| \$1,776 - \$2,026 | The Declaration Level <i>*Signature Class Giving Amount!</i> |
| \$2,027 - \$4,999 | The Liberty Bell Level |
| \$5,000+ | The Founders Circle Level |

I/We are pledging total gift of \$ _____ to the Class of 1976 Legacy Gift for the READY Program (or other preference).

I/We are donating to the fund via:

- Check (payable to Otterbein University)
 - QCD* or other electronic funds transfer (*see page 2 for more information)
 - Stock, Securities, or Other (specify _____)
 - Credit Card Information VISA MC Discover AMEX
- Card # _____ CID# _____ Exp. Date _____

I/We will be funding this pledge:

- Immediately, payment included with this form
- Over 2 years, totaling \$ _____ per year, starting in _____
- Over 3 years, totaling \$ _____ per year, starting in _____
- Quarterly or monthly, totaling \$ _____ per quarter/month (up to 3 years)
- Please provide me with reminder invoices

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

- The Class of 1976 Legacy Gift (supporting the Otterbein READY Program)
- Otterbein Fund
- Other: _____
- I/We would like to establish an endowed scholarship (min. is \$25,000, pledged over five years*)

*Please note: The minimum endowed scholarship fund amount will increase to \$50,000 on July 1, 2026.

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

*To ensure proper crediting of your tax-deductible gift, please return this form with your donation.
Please see page 2 for additional information.*

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

Matching gift employer(s): _____ 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 (QCD):**

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 Required Minimum Distribution (RMD) 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 to you 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. Charitable remainder annuities are available for Ohio residents only.

Please send me more information on:

- | | |
|---|---|
| <input type="checkbox"/> Making a Bequest to Otterbein | <input type="checkbox"/> IRA Charitable Rollover |
| <input type="checkbox"/> Charitable Remainder Annuity – Receive guaranteed income while supporting Otterbein. | <input type="checkbox"/> A gift related to my Required Minimum Distribution (RMD) |

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