

BECOME A LEGACY LEADER AT OTTERBEIN

Make an impact today, tomorrow and forever.



OTTERBEIN
UNIVERSITY



JOIN THE OTTERBEIN 1847 SOCIETY



Honoring the year that Otterbein was founded, the 1847 Society provides special recognition to those individuals who have made a commitment to Otterbein through estate or planned gifts, regardless of size.

A commitment to Otterbein University through a planned gift will ensure a future of academic excellence.

Membership in the 1847 Society recognizes the outstanding benevolence in naming Otterbein as part of your legacy. In gratitude, we offer a variety of experiences that will show how you have made a difference for Otterbein's future. This includes several events, lecture series, dialogues and special communications throughout the year from our leadership team.

With donor permission, we also recognize planned gift commitments in *Towers* magazine and on our website to acknowledge this ultimate gift as an example for others.

MAKE AN IMPACT TODAY, TOMORROW *and* FOREVER

Otterbein's strength today is in part based on the generous commitments of past supporters. You can make a powerful difference in our university's future by including Otterbein in your estate plans. Why not plan for your charitable giving now?

At Otterbein, there are several planned gift options. Many alumni and friends choose to make a blended gift. Simply put, this is a two-part charitable commitment of an immediate donation, as well as an estate gift. While our planned giving program addresses future priorities, we have urgent projects today where your support makes a huge impact. A blended planned gift is an example that accomplishes both the current and future needs of the university.

As you prepare to join the 1847 Society, consider also joining the Joanne Van Sant Society, which recognizes our strongest annual supporters. Your yearly gift will ensure that your impact is not only felt by future generations of students, but also those on campus today.





BENEFICIARY DESIGNATION

Each of these options will ensure 100% of what you designate comes directly to Otterbein, avoiding any income or estate taxes.

RETIREMENT ACCOUNT

You can establish Otterbein as the primary or additional beneficiary of your IRA, 401(k), TIAA or other retirement account.

LIFE INSURANCE POLICY

You can establish Otterbein as the primary or additional beneficiary of your life insurance policy.



CHARITABLE GIFT ANNUITY

This investment vehicle will provide a fixed income for life, for you or a dependent, and will provide a charitable tax deduction up front for the transfer of cash or an appreciated asset like property. Parameters vary by state; please consult with Otterbein for more information.



STORIES OF IMPACT

LOIS SZUDY '99

Lois has been standing with Otterbein for a very long time – ever since stepping on the campus of Otterbein University in the summer of 1990. She began her career at Otterbein as the director of the Courtright Memorial Library, a position she held until her retirement in June 2015.

"I try to give to every single type of campaign going on," Szudy said. "We are stronger together than we are apart." In keeping with the campaign spirit and combining two of her passions, the library and horses, Szudy made a sizable bequest as a part of the Otterbein "Where We STAND Matters" campaign to establish the Lois F. Szudy Library Endowed Fund and the Lois F. Szudy Equine Endowed Fund. "People say I'm a very giving person," Szudy explained when asked about her generosity. "I do tend to give of myself. I always was the helper kid. Somebody needed help, I was there. From the time I was a teenager. The neighbor needed help. I was there helping."

For more inspiring testimonials from the incredible alumni and friends of Otterbein University, please visit our website at www.plannedgiving.otterbein.edu.



HOW CAN WE HELP YOU?

I would like to learn more about making an impact at Otterbein with an estate gift.

- I would like more planned giving information mailed to me for my consideration.
- I would like to have a conversation with a staff member to discuss initial ideas and options.
- I have already included Otterbein in my estate plans and would like to join the 1847 Society.

Name _____

Street Address _____

City _____

State/Zip _____

Phone _____

Email _____

Affiliation:

- Alumnus/alumna • Class of _____
- Parent
- Faculty/Staff
- Friend of the University

Please fill out your contact information and mail this tear-off to:

**Office of Institutional Advancement
Attn: Planned Giving
Otterbein University
1 South Grove Street
Westerville, OH 43081**

For more information, please visit www.plannedgiving.otterbein.edu or contact us at 614-823-2707 or development@otterbein.edu.



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