



From left to right: Dr. Brandon M. Engorn, Beta Zeta Epsilon (University of Maryland, College Park) 2004, James G. Hirsch, Alpha Kappa (University of Wisconsin - Madison) 1969, Dr. Robert (Bob) E. Fischell, Alpha Upsilon (Duke University) 1951, Ronald M. Mankoff, Beta Iota (University of Minnesota) 1954.



ZETA BETA TAU
FOUNDATION

Each year, the tax season is a reminder of the benefits of planning ahead. While it may be too late to change your 2018 tax picture, it is just the right time to think about your goals for the future and how charitable giving fits in.

Now is the right time to plan.

Smart options for supporting Zeta Beta Tau

Benefit by planning now and giving later

Flexible options for meeting philanthropic goals

Some gift options offer an important planning benefit: the ability to plan now, give later, and keep lifetime control of your gift assets. You can shape your legacy while also having the flexibility to change the gift arrangement if your goals change.

- **A gift in your will or living trust** is a simple, legacy-shaping way to make a difference. Contact us for information about ways your gift can be designed and implemented, and consult your attorney to create or update your will or living trust.
- Another option is to **name Zeta Beta Tau Foundation as the beneficiary of a life insurance policy or retirement account.** As a primary beneficiary, we would be first in line to receive benefits. As a secondary beneficiary, we receive benefits only if the primary beneficiary cannot. Your agent or account custodian can provide the proper form. If your needs change, you can revise your designation.

You may be planning to consult your financial advisors in the coming months, or taking personal stock of your plans. Either way, we invite you to consider ways to support the scholarship and leadership initiatives of Zeta Beta Tau Foundation. Please contact us if we can help you.

Be sure to consult your tax, financial, and legal advisors when considering any planned gift.



Questions? Contact us!

Faron A. Lewitt
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317-506-7066
faron@zbtnational.org
zbtfoundation.org/plannedgiving

A gift from your IRA

If you are an IRA owner age 70½ or over, rather than taking your required minimum distribution (RMD) in 2019, consider a tax-free charitable distribution from your IRA to us. **The distribution (limit \$100,000) counts toward your RMD and no tax is due!** The distribution must be a **direct transfer** to Zeta Beta Tau Foundation—contact us for more information.



Simple Steps Make a Difference
Consider smart ways to plan now and give later

- I would like to know more about ways to support Zeta Beta Tau Foundation through my will or living trust.
- Please send information about the *City of Light Trust*—the society that recognizes those who have planned deferred gifts to support Zeta Beta Tau Foundation.
- Please tell me more about

For IRA owners age 70½ or over

- Please send information about making a tax-free charitable distribution from my IRA.

Name _____

Phone number _____

Email _____

Please tear at the perforation, fold this panel to the inside and tape securely closed.

Zeta Beta Tau Foundation
3905 Vincennes Road, Suite 100
Indianapolis, IN 46268



Dr. Robert (Bob) E. Fischell, Alpha Upsilon (Duke University) 1951 with ZBT Director of Undergraduate Engagement Brian A. Hoffman, Sigma (Tulane University) 2009 at Hall of Fame induction ceremony.

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