



International President
Norman M. Waas, Esq.,
Alpha Omega (University
of Miami) 1983 and Brother
Marc B. Nathanson, Iota
(University of Denver) 1967

EDUCATION AND LEADERSHIP

Make a
difference for
Zeta Beta Tau
brothers



ZETA BETA TAU
FOUNDATION

Choose how you impact our mission and change lives

A gift to Zeta Beta Tau Foundation helps preserve something very important—a history of funding scholarships and programs that prepare tomorrow’s leaders. There are simple, effective ways to support and enhance the value of the Zeta Beta Tau experience.

- **A gift in your will or trust** Few gifts are as satisfying or as simple to arrange as a gift in your will or trust. You have full lifetime control of the gift property and there is no out-of-pocket cost.
- **Life insurance beneficiary designations** You may have a life insurance policy that was purchased to provide for family needs and now the mortgage is paid, the kids are grown, and your estate liquidity needs are met. You can name Zeta Beta Tau Foundation as the beneficiary or contingent beneficiary of a “no longer needed” policy. Just contact your insurance agent.
- **Retirement assets** Your retirement assets may include traditional IRA accounts and/or a 401(k) plan. Naming us as the beneficiary of one of these tax-deferred accounts can be a smart planning option for meeting charitable goals.

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

Contact us for information about these and other ways to expand our impact and help the brothers we serve. We’ll send a free copy of our brochure, *Planning Your Will*. It would be a pleasure to help you explore ways to impact Zeta Beta Tau and shape your personal philanthropic legacy.



Faron A. Lewitt
Chief Executive Officer
Zeta Beta Tau Foundation
3905 Vincennes Road, Suite 100
Indianapolis, IN 46268
317-506-7066
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zbtfoundation.org/plannedgiving



Take a simple step that helps ZBT brothers

- Please send your free brochure, *Planning Your Will*.
- Please send specific language for making a gift that I can share with my professional advisor.
- I am interested in the City of Light Trust.
Circle one: *I have included / I would like to know more about including*
Zeta Beta Tau Foundation in my will and estate planning.
- I would like to know more about using beneficiary designations to make a gift.
- Tell me more about making a gift from an IRA.

Name _____

Phone number _____

Email _____

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

When you support Zeta Beta Tau Foundation with an estate gift, you qualify for the **City of Light Trust** and join other members who enjoy special events and recognition. If you would like to learn more, or if you already qualify for membership, please let us know by returning this card.

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

A gift from your IRA

If you are an IRA owner age 70½ or over, consider a tax-free charitable distribution from your IRA to Zeta Beta Tau Foundation. You pay no tax on your gift (aggregate annual limit \$100,000) and the amount transferred counts toward your required minimum distribution (RMD) if one is due. The distribution must be a direct transfer to us. Contact us for additional information about this tax-wise gift.



Brother Harold R. Oseff, Esq.,
Eta (University of Michigan) 1968



PLACE
STAMP
HERE

ZETA BETA TAU FOUNDATION
3905 VINCENNES RD STE 100
INDIANAPOLIS IN 46268-3000

