

MORE THAN A GIFT  
Your support helps prepare  
tomorrow's leaders



Matthew J. Rubins, Kappa  
(Cornell University) 1990 with  
undergraduate brothers



**ZETA BETA TAU**  
FOUNDATION

## 2020: Planning is more important than ever

A year like no other, 2020 has reminded us that change can happen quickly, and that caring for and about each other makes an important difference. We remain steadfast in our mission to provide scholarships and leadership development programs, and we invite you to consider options for supporting Zeta Beta Tau Foundation. With your help and encouragement, we will continue to transform lives and shape the future for good.



Faron A. Lewitt  
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[zbtfoundation.org/plannedgiving](https://zbtfoundation.org/plannedgiving)

- **Donor-advised fund.** A transfer from your fund to Zeta Beta Tau Foundation makes an immediate impact at an important time, and it comes from funds you've already set aside for charitable giving.
- **Stock.** A gift of appreciated stock held at least one year avoids capital gains tax.
- **Cash.** The CARES Act created special rules for cash gifts in 2020. Ask us for more information.
- **Retirement assets.** IRA owners 70½ or over can make a charitable distribution from an IRA and avoid tax on the distribution. Ask us for details. You can also name us the beneficiary of a retirement account.

**We can help! Ask for our free resources that can help with your planning.**

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



## Planning tips that help you and ZBT

### Join us as we develop tomorrow's leaders

- Please send your free brochure, *10 Year-End Taxpayer Strategies*.
- Please send your complimentary CARES Act fact sheet.
- I would like to know more about gifts of appreciated stock.
- Tell me more about giving from an IRA (age 70½ or over).
- Please send information about will and estate planning.

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

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.



Alan F. Trump, CPA, Alpha Rho (UCLA) 1975  
with an undergraduate brother



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PLACE  
STAMP  
HERE