

Simple steps. Sure results.

Good gift options for changing times.



ZETA BETA TAU
FOUNDATION



2022 Mankoff Panel. From left to right:
Steven M. Begalman, Alpha Omicron (University of
Arizona) 1990; Todd D. Smith, Zeta Pi (East Stroudsburg
University) 1994; John D. Stemen Esq., Omicron (Tufts
University) 1999; and Devon M. Schad, Beta Alpha Theta
(University of Colorado - Boulder) 2004.

Meet year-end planning and giving goals

Continuing our mission of preparing future generations of ZBT brothers to lead and serve their communities depends on the generosity of people like you, and we are extremely grateful for the support we receive. During changing times, remember that there are simple, effective options that may fit well in your year-end planning:

- **Charitable gift annuities** are especially attractive to donors today because rates increased earlier this year. The fixed annual payments can supplement your income for the rest of your life.
- **A gift of appreciated stock** you have held for more than one year provides a tax-wise personal benefit. You pay no capital gains tax on the stock's appreciated value, and the gift qualifies for a charitable tax deduction based on the full current value of the stock.
- **A gift from your IRA** can be beneficial if you are age 70½ or over. A direct transfer from your IRA to the Zeta Beta Tau Foundation counts toward your required minimum distribution if one is due, and you pay no tax on the distribution. Contact us for details, including annual limits.
- **A grant from a donor-advised fund (DAF)** to the Zeta Beta Tau Foundation impacts our work immediately, and it comes from funds you have already set aside for reaching charitable goals.

Consult your tax and financial advisors when considering any planned gift.



Take a sure step

Contact us with questions or for additional gift planning ideas. It would be our privilege to help you find sure ways to meet charitable goals.

Faron A. Lewitt

Chief Executive Officer
Zeta Beta Tau Foundation
317-506-7066
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zbtfoundation.org/plannedgiving

Learn more. Give wisely.

- Tell me more. Please send your free brochure, *10 Strategies for Year-End 2022*.

- I am interested in charitable gift annuities. Please send a free illustration based on the following information:

One life _____ Two lives _____ Age(s) _____
Gift amount \$ _____

- I *have made / am considering* (circle one) a transfer to the Zeta Beta Tau Foundation from my IRA.

- I *have made / am considering* (circle one) a grant to the Zeta Beta Tau Foundation from my donor-advised fund.

- I would like to know more about: _____

NAME: _____

PHONE NUMBER: _____

EMAIL: _____

Thank you for supporting the Zeta Beta Tau Foundation!

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

Zeta Beta Tau Foundation
1320 City Center Drive, Suite 225
Carmel, IN 46032



Craig J. Wild CPA, Gamma Phi (Hofstra University) 1979, and Michael F. Zarb, Beta Alpha Chi (York College of Pennsylvania) 1992.

Sample Gift Annuity Rates

ONE LIFE

AGE	65	70	75	80	85	90
RATE	4.8%	5.3%	6.0%	7.0%	8.1%	9.1%

TWO LIVES

AGES	65/65	70/70	75/75	80/80	85/85	90/90
RATE	4.3%	4.8%	5.2%	5.9%	6.9%	8.6%

Rates became effective July 1, 2022 and are subject to change.



ZETA BETA TAU FOUNDATION
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