

Help us preserve educational enrichment opportunities

Plan how you will make a lasting impact



ZETA BETA TAU
FOUNDATION

Devon M. Schad, Beta Alpha Theta
(University of Colorado Boulder)
2004, and his wife, Kelli, at the
Inaugural Visionaries Celebration
on March 2 in New York City.



Support your ZBT brothers. Choose the gift strategy that is best for you.

The generosity of our supporters makes it possible for us to continue providing academic scholarships and vital funding for leadership development and heritage programs. We are grateful for every gift and every donor. If you would like to make a powerful impact at Zeta Beta Tau, consider leaving a legacy with a planned gift. There are many giving options, including:

- **A gift in your will or living trust.** This is an easy, flexible way to make a sizable gift without impacting your current finances.
- **A charitable beneficiary designation.** By simply filling out a change of beneficiary form, you can make the Zeta Beta Tau Foundation the sole or partial beneficiary of a retirement account or life insurance policy.
- **A life-income gift.** This is a gift you fund now that pays you an income for life (or for a period of years), and the remainder goes to the Zeta Beta Tau Foundation. Charitable remainder trusts (CRTs) and charitable gift annuities (CGAs) are common examples of life-income gifts.

Sometimes a blended gift is best.

Do you want the flexibility of making a larger future gift *and* the joy of making an immediate impact? Consider a blended gift strategy—simply combine any two or more gifts, such as a current gift with a future gift.

Please contact us. We're happy to help you design the best strategy for supporting Zeta Beta Tau while meeting your unique financial and charitable goals.

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

Take advantage of new, higher CGA rates!

If you are considering a life-income gift, now is a great time to explore the benefits of a charitable gift annuity, as CGA rates just increased in January.

Sample one-life gift annuity rates, effective January 1, 2023

AGE	70	75	80	85	90
RATE	5.9%	6.6%	7.6%	8.7%	9.7%

Contact us for the rate for your specific age or for a personalized illustration.



Contact us with questions or for additional gift planning ideas:

Faron A. Lewitt, Chief Executive Officer, Zeta Beta Tau Foundation

317-506-7066 | flewitt@zbtfoundation.org | zbtfoundation.org/plannedgiving

ZBT LIVE The Man with the Plan: A Conversation on

Estate Planning | April 19, 2023, 8:00 p.m. Eastern Time



It is never too early or too late to plan for your future. Register for this upcoming ZBT Live event that will offer a fresh perspective on estate planning from financial, tax, and legal angles. Panelists will share key knowledge and best practices for estate planning. Make a plan for your future and RSVP today to join this virtual event. Missed the discussion? **You can also visit www.zbtfoundation.org/zbtlive to watch the recording.**



Jim P. Summers (left), Gamma Epsilon (Marshall University) 1970, is presented with his framed Franklin O.L. & Stephen Steinberg City of Light Trust certificate by Faron A. Lewitt (center), Psi (University of Alabama) 1997, CEO of the Zeta Beta Tau Foundation and Bret W. Hrbek (right), Delta Xi (Virginia Tech) 1996, President of the Zeta Beta Tau Foundation. The trust recognizes and honors those who have made deferred gifts, whether revocable or irrevocable, to the Foundation, including, but not limited to, trusts, bequests, gifts of life insurance, and annuities.



ZETA BETA TAU FOUNDATION
1320 CITY CENTER DR STE 225
CARMEL IN 46032-3823



PLACE
STAMP
HERE

Support Brotherhood for a Lifetime. Learn more about ways to make an impact.

Please send information about:

- planning a gift in my will or trust
- making a beneficiary designation
- creating a life-income gift
- implementing a blended gift strategy

- Send me a personalized CGA illustration based on the following information:
One life _____ Two lives _____ Age(s) _____
Gift amount \$ _____

- I *have made / intend to make* (circle one) a planned gift to the Zeta Beta Tau Foundation.

- Please send your free, helpful brochure, *Plan Now, Give Later: Flexible Plans that Make a Difference.*

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
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Carmel, IN 46032