

BOSTON
UNIVERSITY



PLANNED
GIVING
OFFICE

800-645-2347
bu.edu/plannedgiving

THE CLAFLIN SOCIETY

We celebrate thoughtful philanthropists through **The Claflin Society**, a membership group that pays tribute to alumni and friends of **BU** who have established a planned gift.

The society was founded by Elsbeth Melville (CAS 1925), Dean of Women Emerita, and named for one of the co-founders of Boston University, Lee Claflin.

Benefits of Membership:

- Invitation to an annual spring luncheon
- Invitation to a tea reception with First Lady, Dr. Beverly A. Brown
- Invitation to select regional alumni events

Qualifications of Membership:

- A bequest in a will or trust
- Designating **Boston University** as beneficiary of a retirement plan or life insurance policy
- Charitable remainder trust
- Charitable lead trust
- Charitable gift annuity
- Remainder interest gift of a home or other property
- Making a Qualified Charitable Distribution from your IRA

Planned Gifts are a great opportunity to build a personal legacy. For Claflin Society members, this is often an empowering act that conveys important personal values to the next generation.

UPCOMING CLAFLIN SOCIETY EVENTS

This year's **Annual Claflin Society Luncheon** will be held virtually via Zoom on April 28, 2022. We hope you can join us!

Have you already finalized a planned gift to **Boston University**, but haven't notified us yet? Do you need to update your contact information? Please contact us at 800-645-2347 or opg@bu.edu to make sure you receive an invitation to this and other future events!



Boston University
THROWBACK

Famed Jazz Pioneer Louis Armstrong visiting with BU College of Music students at Sleeper Hall on October 1, 1953.

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SPRING 2022



BOSTON
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BU LEGACY
—The Power of Planned Giving—

Remote but never Distant |



Ann Chesley (MET'18) earned her graduate degree from **BU's Metropolitan College** through courses she completed online. Even without entering a classroom on campus, she felt a real connection to the school, thanks to the kindness and sense of community she found there.

As it happened, her MET experience took place during what she remembers as one of the most difficult times of her life, because her father had recently learned that he had pancreatic cancer. Understandably, that made it hard for Ann to focus on anything else. But, she says, doing the work for her master's degree in project management was actually a great comfort.

"My courses really helped me stay focused," she says. "And I really felt

"I had a great experience at MET. I'm grateful that I'm able to give back."

that MET was my community. That was a wonderful feeling, because it was something I hadn't experienced at my undergraduate alma mater."

Ann felt that sense of community in her online classes, and she felt so

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A CHARITABLE GIFT ANNUITY

Gives You Benefits For As Long As You Live

By funding a charitable gift annuity with **Boston University**, you receive the security of fixed payments throughout the year, and a portion of the payments may be tax-free. Your gift annuity can also benefit you and another person, such as your spouse. Payments continue for as long as either of you live.

BU's Office of Planned Giving can easily model different options of your payout rate, income tax deduction, and potential tax-free portion in just a few moments. If you like doing it yourself, visit our website (bu.edu/plannedgiving), where we have a handy calculator for you to explore. Whether you click, call, or email us, we are here to help.

ENJOY BENEFITS TODAY WHILE HELPING BOSTON UNIVERSITY TOMORROW

(Ann Chesley continued)

grateful to MET that she made a substantial planned gift to the college.

"It's such a wonderful institution," she says, "and I am happy to think that other students will be able to benefit, too."

That warm feeling has continued even now, when Ann is living with her mother in Ohio and therefore has had few opportunities to return to Boston.

She did visit in the winter of 2020, when MET Dean Tanya Zlateva had a chance to thank her for her generous gift. And she continues to feel a connection to MET wherever her travels and her career take her, most recently to a remote position as senior project controls specialist with Los Alamos National Laboratory.

Ann's connections to BU as a whole stay strong as well. She has joined the

When you fund a charitable gift annuity with BU, you receive:

Fixed payments to you, you and a loved one, or another annuitant you designate for life

An income tax deduction for the charitable gift portion of the annuity

Additional capital gains benefits if you transfer appreciated property

Satisfaction, knowing that you are strengthening BU's future with your gift

advisory board for the University's project management programs; she's also planning to obtain a graduate certificate in project portfolio management from MET next year—just one more way that the college will help her keep sharpening her skills.

"I had a great experience at MET," Ann says. "I'm grateful that I'm able to give back."



A Quick and Easy Way to Make a Meaningful Gift to

BOSTON UNIVERSITY

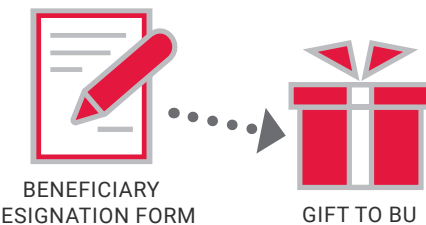
A beneficiary designation form may sound intimidating, but it is one of the simplest, most effective, and tax-efficient ways to support BU in your estate plans.

With it, you can designate BU to receive funds after your passing.

You can easily make your gift from your:

- Savings account
- Investment account
- Checking account
- 401(k), IRA and other retirement accounts

Just call or visit your account administrator's website to obtain the form or use their online tool. It only takes a few moments to complete.



Perhaps the best feature of a beneficiary designation is you can change your mind. Unlike other planning methods that have more formal requirements, this form can be changed any time you want. Of course, we strongly suggest that you contact your professional advisor to make sure it fits your plans and tax situation. If you would like more information or want to include **BU** in your estate plans, please call or email us anytime.

Please note: Boston University is a tax-exempt public charity and does not provide tax, legal, or financial advice. Any document or information shared by our staff is intended to be educational and informational. BU strongly encourages all of our benefactors to seek counsel from their own legal and financial advisors. Please know that any information or documents shared by the Development staff cannot be used to avoid tax-related penalties.