

PLANNED GIVING OFFICE

800-645-2347
bu.edu/plannedgiving

Glenn Vivian
 Assistant Vice President
 P: 617-353-2214
 E: gvivian@bu.edu

Sharon Wheeler
 Director
 P: 617-353-9522
 E: wheeles@bu.edu

Danielle Jenkins
 Assistant Director
 P: 617-353-2255
 E: jenkinsd@bu.edu

Olivia Osiecki
 Coordinator
 P: 617-353-2254
 E: oeo@bu.edu

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.

Boston University celebrates thoughtful philanthropists through The Claflin Society, a membership group that pays tribute to alumni and friends of Boston University who have established a planned gift.

If you are interested in learning more about membership in this special group, please contact the BU Planned Giving Office at 800-645-2347 or visit our website at bu.edu/plannedgiving.

MAKE YOUR GIVING GO FURTHER

Technology has made all of our lives easier. Just by using a smartphone, you can talk to people all over the world, check the weather forecast, or reserve a seat on a plane. The true power of the smartphone is how it combines a myriad of tools in a single sleek device.

As you support our mission, you might be interested in ways to increase your impact. By combining different giving tools together, you can multiply the difference you make.

You may already be making annual gifts to us. We appreciate your support! Here are some ways your annual gifts may be combined with other opportunities to make your support go even further:

- You can add a gift in your will to ensure that your legacy of support for our work continues.

- In addition to your annual gifts, you can make a single gift to fund a charitable gift annuity. You will receive lifetime fixed payments and tax savings.

- Another way to help us beyond your regular annual giving is with a charitable life estate. You can convey your home to us, remain living there, and receive tax benefits.

When you think about all of the tools available to you, you can do more than you might have thought possible. By adding a charitable gift annuity or a gift of your home, you can benefit from lifetime payments and tax savings.

Call or email us to learn how we can help you combine your giving in a way that benefits you and strengthens the future of Boston University.

SPRING 2018

BOSTON UNIVERSITY

BU LEGACY

— The Power of Planned Giving —

ENCOURAGING **ACTIVISM AND ALTRUISM** THROUGH SCHOLARSHIPS



PAMELA SINCLAIR
 (CAS '66)

“THE GREAT THING ABOUT BU,” says Pam Sinclair, “was that it had everything: size, athletics, diversity, social life, and academic opportunities. It was a combination that changed my life.”

Now, in appreciation, Sinclair is giving back to BU with a future gift that will establish a scholarship at CAS. Her planned gift, she hopes, will help students gain access to a broad range of experiences similar to her own.

“Giving back was ingrained in us as kids,” she says. “So giving to BU for all that it gave me seems natural.”

Sinclair grew up in the Boston area and wanted to stay local for college. She loved English literature, but later discovered that she had a strong aptitude for information technology. An internship at New England Telephone led to a full-time job at the company upon graduation. It was the start of a long and fruitful career, soon at Nynex and, finally, Verizon. With each move, she rose through the ranks.

“Just as at BU,” Sinclair says, “there were huge opportunities in that industry.”

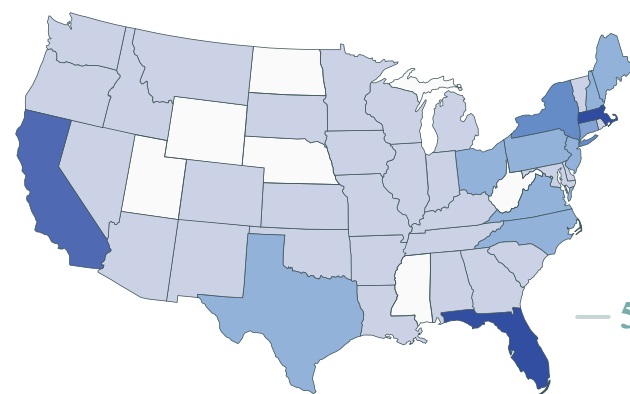
She also became an advocate for women in the workplace everywhere she went. Today, as a retiree, she volunteers with a group that works to socially and economically empower women and girls. She sees BU as doing relevant work. “I want to encourage young people—their activism and altruism,” she says. “A good education is the first step.”

EDUCATION IS A GIFT. PASS IT ON.

To learn more about making a planned gift to Boston University, contact the Planned Giving Office at 800-645-2347 or opg@bu.edu, or visit bu.edu/plannedgiving.

THE CLAFLIN SOCIETY

ACTIVE MEMBERS: 1036*
*as of 6/30/17



- 1 - 19 members
- 20 - 39 members
- 40 - 59 members
- 60 - 79 members
- 80 - 99 members
- 100 + members



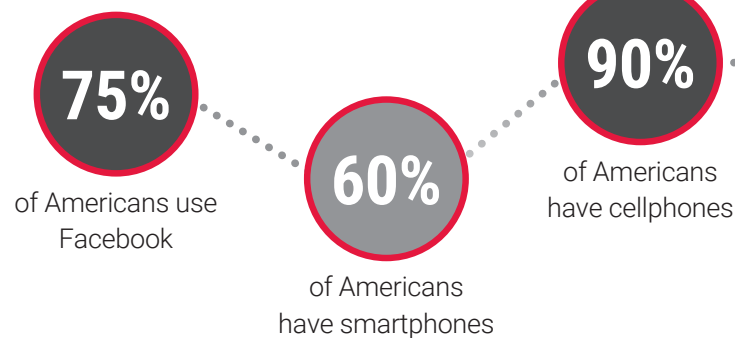
TAKE A TURN IN THE RIGHT DIRECTION

Experts say we will soon “drive” self-driving cars that can take us where we want to go while allowing us to sit back and sleep, play chess, read, or do anything else that helps us relax.

While that may be the future, most people are not ready to turn over control and trust self-driving cars. Can a self-driving car get you where you want to go? Will it stay on the road? How will it handle something unexpected?

When it comes to our future and the safety and care of loved ones, many of us would not relinquish control to a car that was on auto-pilot. What if it did not work as intended? Yet, when it comes to our finances, healthcare, and our estate plans, many of us have freely chosen to give up control to a system that is random and ill-equipped to make the kind of decisions we can best make ourselves.

GET IN THE DRIVER'S SEAT!



Under state law, if you are incapacitated or pass away without a plan, someone else will make important decisions that could affect you and your loved ones. For example, if you die without a will or trust, a court will determine how your assets are distributed and that may happen in a way that does not reflect your wishes.

Don't leave your legacy to chance. It's easier than you might think to write a will and provide for the people and causes that mean the most to you.

CONTACT US TO REQUEST YOUR FREE GUIDE

We can help you gather the information necessary to create your plan using our estate planning guide. Also, let us know if you plan to include BU in your estate plans so we can make sure your gift goes to help the programs that mean the most to you.

YOUR LIFE AND YOUR GOALS

While the world may not be quite ready for a self-driving car, it is nice to imagine a car that could give you peace of mind by avoiding traffic jams, save you time by getting you to your destination sooner, and which could save you money by reducing fuel consumption.

While we can't give you this car, we can help give you peace of mind and help you save time and money. Most of your wealth is probably invested in your home, a bank, or other investment accounts.

One of the most important things you can do is to put together a plan to provide for family and to support the charities you care about.



These assets can all be transferred to your loved ones or benefit BU without you ever writing a will. By making a simple change, these assets can go automatically to the beneficiaries you select.

- **Life Insurance** - Complete a beneficiary designation form, designating a person or charitable beneficiary for your life insurance policy.
- **IRA** - Complete a beneficiary designation form to benefit the people and charities most important to you. Many administrators now make these forms available online.
- **Investment, Checking, and Retirement Accounts** - List your loved ones or favorite charities as payable on death beneficiaries on a form provided by your account administrator.
- **Real Estate** - Give your property to loved ones and your favorite charities by deed while reserving a life estate. We can provide you with a free illustration of the benefits of this plan.

When a beneficiary designation is completed properly, assets simply pass automatically at your death. Call or email us for all the ways you can make modest changes to your plans and benefit the people and charities important to you.