

*Join Others to Build
a Secure Future*



Since graduating from college I have served in multiple roles within AOII, and have annually given to the Foundation. I feel like all of these things are making a positive impact on AOII now, but what I am doing through the Second Century Society with my gift of life insurance, will ensure the future of AOII for many years to come. The Second Century Society is a way for me to give back to AOII even after I can no longer be here to actively serve her. It is my sincere desire that other women get to share in what is uniquely our AOII.....because of the Second Century Society, they will.

Laura Dunlap

Kappa Tau '96

Southeastern Louisiana University
Network Specialist of Development



Our Mission

THE ALPHA OMICRON PI FOUNDATION IS
COMMITTED TO ENHANCING THE LIVES OF OUR
MEMBERS AND SECURING THE FUTURE OF OUR
FRATERNITY THROUGH LEADERSHIP DEVELOPMENT,
SCHOLARSHIPS AND PHILANTHROPIC ENDEAVORS.

Our Vision

SECURING THE FUTURE OF ALPHA OMICRON PI.



Which gift is right for you?

For more information contact Barbie Chadwick
to personalize your gift:



p: 615.695.2626
e: bchadwick@alphaomicronpi.org
a: 5390 Virginia Way
Brentwood, TN 37027
w: www.aoiifoundation.org

GIVE WITH CONFIDENCE

We respect the generosity of your well-intended gift to the Alpha Omicron Pi Foundation and commit to efficiency, transparency and accountability to ensure that your donation is safe and effective. All monetary gifts to the Alpha Omicron Pi Foundation, tax I.D. 58-1343315, are U.S. tax deductible to the full extent allowed by law.



SECURING THE FUTURE
THROUGH PLANNED GIVING



The simplest way to create a legacy is to make a *bequest* to the Foundation!

BENEFITS INCLUDE:

- **Simple** way to provide for your charitable interests that cost you nothing during your lifetime
- **Flexible** to be revocable at any time and not payable until death
- **Versatile** to allow for designations tailored to your specific areas of interest
- **Tax Relief** as it provides your estate with a tax deduction for the value of the gift, if applicable

TO MAKE THIS GIFT simply include the following bequest language in your plan:

I, [name], of [city, state ZIP], give, devise and bequeath to the Alpha Omicron Pi Foundation [written amount or percentage of the estate or description of property] for its unrestricted use and purpose.



Gifts of *retirement assets* to the Foundation are tax-free!

An alternative to naming the Foundation in your will or trust is to simply complete a Change of Beneficiary form naming the Foundation as a beneficiary of a part or all of your traditional IRA or other retirement plan. These distributions are tax-free when left to charity but otherwise subject to income and sometimes estate tax when left to heirs.

TO MAKE THIS GIFT simply contact your plan’s administrator and complete a “Change of Beneficiary” form.

Life insurance can be a low cost way to provide a large gift!

You can make a current gift of a paid – up life insurance policy by making the Foundation the irrevocable owner and beneficiary of your policy today. You can also name the Foundation as the policy beneficiary at your death. If you want to donate a policy that still requires premium payments, please contact us for more details.

BENEFITS INCLUDE:

- **Easy** way to make a sizable gift at a low cost to you
- **Tax Relief** as you receive a federal income tax charitable deduction for the value of your paid up policy or for future premium payments and removes taxable proceeds from your estate

TO MAKE THIS GIFT simply contact your insurance company and complete a “Change of Beneficiary” form.

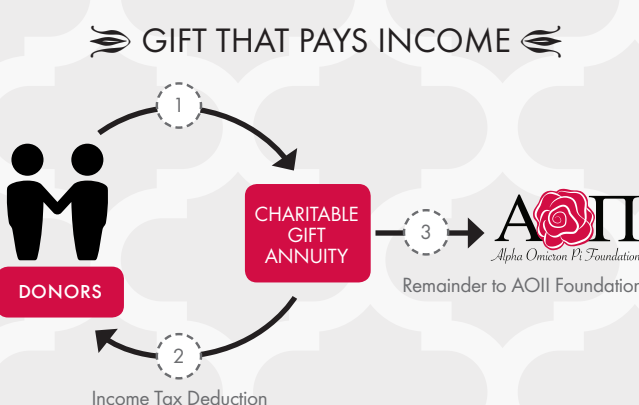
Make a gift and *receive income*!

You can make a gift to the Foundation through a trust or annuity that will pay you and another beneficiary income. At the death of the last income beneficiary the remaining principal is transferred to the Foundation and put directly to work for the purpose(s) you designate.

Gifts that generate income are established when you transfer an asset into a trust or in exchange for an annuity. After the transfer you and/or another beneficiary receive an annual income. When the plan terminates, the remainder passes to the Foundation.

ADDITIONAL BENEFITS CAN INCLUDE:

- **Avoid** capital gains tax by using appreciated assets to fund the gift
- **Convert** a low or no income producing asset into a gift with an income stream
- **Diversify** your investments



Gifts of securities and other *appreciated assets* can be more beneficial than cash!

BENEFITS INCLUDE:

- **Tax relief** as you receive a federal income tax charitable deduction for the full appreciated value
- **Avoid** capital gains tax on the gift transaction thereby costing less than equivalent gifts made in cash

APPRECIATED ASSETS INCLUDE:

- Marketable securities
- Business Interest, Closely Held Stock and Partnerships
- Tangible Personal Property
- Real Estate

Detach and Return

Name _____
Address _____
City _____
State _____ Zip _____
Phone _____
E-mail _____

PLEASE SEND ME MORE INFORMATION ABOUT THE FOLLOWING:

- ☐ Bequest
- ☐ Gift of Retirement Assets
- ☐ Gift of Life Insurance
- ☐ Gift that Pays Income
- ☐ Gift of Appreciated Assets