



**ELLIS C. MAXCY
Legacy Society**

University of New Haven

Thank you for your interest in including the University of New Haven in your estate plans.

All donors who include the University in their estate plans become part of the Ellis C. Maxcy Legacy Society. This society recognizes the commitment and generosity of those who have remembered the University in their will or estate plans. You can also choose to remain anonymous if you wish.

Included in this packet are the following informational documents:

- **Ellis C. Maxcy Legacy Society Informational Sheet**
- **Ellis C. Maxcy Legacy Society Brochure**
- **Sample Bequest Language**
- **Easy Ways to Include the University in Your Estate Plans**
- **Ellis C. Maxcy Legacy Society Commitment Form**

If you are thinking about making a charitable gift to the University of New Haven in your will or other plans, we would be pleased to share more information and discuss options that will best suit your individual needs.

If you have already included the University in your estate plans, we encourage you to let us know. Information is kept confidential, and we respect any desire to remain anonymous. We would like to recognize you and your family for your generosity.

Please contact me at 860.478.2870 or lwrubleski@newhaven.edu with any questions.

We thank you again for your consideration of including the University in your estate plans.

Sincerely,

Lisa Wrubleski

Lisa Wrubleski

Director of Development, Planned and Major Gifts



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University of New Haven

Thank you for your generous legacy commitment to the University of New Haven through the Ellis C. Maxcy Legacy Society. By giving this impactful gift, you are making an investment in our students and their future.

A prominent display in Maxcy Hall celebrates the generosity of Legacy Society members and will include your name(s) on a plaque. Additionally, from time to time we include members in reports or online listings.

The University may list our names as follows:

- _____
- I/We prefer to remain anonymous.

Signature

Signed Date (MM/DD/YYYY)

Please return this form to the Office of Advancement.

EMAIL

Lisa Wrubleski
Director of Development, Planned and Major Gifts
lwrubleski@newhaven.edu

MAIL

University of New Haven
Office of Advancement
Attn: Lisa Wrubleski
300 Boston Post Road
West Haven, CT 06516

If you are making a new will or trust, you can simply include the University of New Haven among the beneficiaries of your estate. If you already have a will, you can make the University a beneficiary of your estate through a simple document called a codicil.



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The University of New Haven is a 501(c)(3) not-for-profit corporation, with Federal Taxpayer Identification Number **06-0761704**.

General Bequest (*Suggested Language*)

I hereby bequeath to the University of New Haven, a tax-exempt organization, located at 300 Boston Post Road, West Haven, Connecticut 06516, the sum of _____ dollars (or, alternatively, _____% of my residuary estate, or include a description of property, assets, etc., that you wish to bequeath) for its general purposes.

Specific Bequest (*Suggested Language*)

I hereby bequeath to the University of New Haven, a tax-exempt organization, located at 300 Boston Post Road, West Haven, Connecticut 06516, the sum of _____ dollars (or, alternatively, _____% of my residuary estate, or include a description of property, assets, etc., that you wish to bequeath). It is my wish that this gift be specifically used to support (describe specific intent here – scholarships, athletics, student services, etc.). If it becomes inappropriate or impossible to accomplish the purpose of the gift as described herein, then the Board of Governors may designate this bequest to be used for the benefit of a substantially similar purpose.

Specifying a percentage of your estate as a bequest is generally preferable to specifying a dollar amount. It means that the beneficiaries of your estate, including tax-exempt not-for-profit organizations like the University of New Haven, will receive the proportion you intend, even though your estate may increase or decrease in value.

If you would like to specify the use of your bequest, please contact **Lisa Wrubleski, Director of Development, Planned and Major Gifts**, at **860.478.2870** or lwrubleski@newhaven.edu, so we can help you or your attorney word your wishes in a form that ensures your intent will be honored when your bequest is received.

The Ellis C. Maxcy Legacy Society celebrates alumni and friends who support the future of the University with a gift from their estate.



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The Ellis C. Maxcy Legacy Society is named after our first president, Ellis C. Maxcy, who headed the school from 1932 to 1937. Just as Dr. Maxcy and our founders had a vision that would create an educational system of the future, so do the members of the Ellis C. Maxcy Legacy Society. Donors who generously support the University through planned giving provide the foundation for excellence for years to come.

Benefits

Joining the Ellis C. Maxcy Legacy Society gives you an enduring connection to the educational mission of the University. By becoming a member of the Maxcy Legacy Society, you will enjoy the following benefits:

- The satisfaction of knowing you will have a positive impact on future University students and that you will always be remembered as someone who values higher education
- Your name listed on a permanent display in the center of Maxcy Hall, our main campus building
- Your name included as a member of the Maxcy Society in University of New Haven Donor Reports
- VIP invitations to special events and seminars

Membership

Join this group that sustains the vitality of the University of New Haven by making one of the following:

BEQUEST

A provision of one's estate plan (will or living trust) that includes the University as a beneficiary, such as:

- A specific bequest of money or property,
- A residual bequest of the remainder of the estate after specific bequests, or
- A contingent bequest (gift occurs only if named beneficiaries die before the donor).

PLANNED GIFT

An irrevocable gift that provides a donor (and/or others) with a life income or other benefits and specifies Connecticut Public as the charitable beneficiary

LIFE INSURANCE

A donor may:

- Take out a policy naming the University as the beneficiary (which is revocable),
- Take out a policy naming the University as owner and beneficiary (which is irrevocable), or
- Naming the University as the beneficiary of an existing policy or by transferring ownership of the policy to our organization.

QUALIFIED RETIREMENT PLAN

Donors can select the University to be the beneficiary of a tax-deferred retirement plan such as an IRA, 401(k), or 403(b).

Thank You for Considering a Gift to the University of New Haven

If you are thinking about making a charitable gift to the University of New Haven in your will or other plans, we would be pleased to share more information and discuss options that will best suit your individual needs. Please consult an attorney, financial advisor, or tax advisor in your planning.

If you have already included the University in your estate plans, we encourage you to let us know. Information is kept confidential, and we respect any desire to remain anonymous.

QUESTIONS? PLEASE CONTACT:

Lisa Wrubleski

Director of Development, Planned and Major Gifts

860.478.2870

lwrubleski@newhaven.edu

**Simple ways to include the University of New Haven
in your estate plans.**



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Are you interested in including the University of New Haven in your estate plans but do not want to go through the expense of updating your will? One option is to have your attorney add a codicil to your will. A codicil is a legal document that acts as a supplement to your last will and testament. In it, you can amend your will without having to rewrite your entire original will document. This is often a less expensive way to make a change without redoing your will completely.

Other options are to take stock in your non-physical assets. Planning can ensure you achieve the most tax savings available while meeting your charitable goals. Assigning a charity to the following assets is often as simple as filling out a beneficiary form. This can also simplify the probate process.

- **Bank Accounts**
- **Life Insurance Policy**
- **Accidental Death Policy**
- **Annuities**
- **CD Accounts**
- **Vehicle(s)**
- **Individual Brokerage Accounts**
- **Retirement Accounts**

As always, we recommend you consult your tax advisor for specific advice on your estate planning.

To assist you in your estate plans or request a copy of our free estate planning guide, please contact:

Lisa Wrubleski

Director of Development, Planned and Major Gifts

860.478.2870

lwrubleski@newhaven.edu

The Ellis C. Maxcy Legacy Society honors individuals who value higher education and make sustaining the University of New Haven part of their legacy.



ELLIS C. MAXCY Legacy Society University of New Haven

I/we have made provisions for the University of New Haven as follows:

- Bequest in a Will, Trust, Life Insurance, Retirement Plan Assets, Other
Specified Amount: \$, Specified Percentage: %
Revocable, Irrevocable

The estimated value of my gift is \$

Estimate only—not a legally binding commitment. The University acknowledges that any gift ultimately distributed may be more or less than this amount.

My/Our planned gift is:

- Unrestricted (Donor's historical giving/areas of interest will be used to align gift with University priorities.)
Restricted for the Following Priority: (Please consult with the University to ensure your restriction can be honored.)
Attached is a copy of the relevant portions of the legal documents relating to my/our future gift to the University (This is optional but helps the University with future planning.)

The University may list our names as follows:

- I/We prefer to remain anonymous.

Name Birth Date (MM/DD/YYYY)

Signature Signed Date (MM/DD/YYYY)

Name Birth Date (MM/DD/YYYY)

Signature Signed Date (MM/DD/YYYY)

QUESTIONS? Contact Lisa Wrubleski, Director of Development, Planned and Major Gifts, at 860.478.2870 or lwrubleski@newhaven.edu.