

Sample language for your class newsletter

(Note: Please contact gift_planning@smith.edu for assistance in collecting statistics for your class.)

Example 1

I want to thank all our classmates who have funded life income gifts or named Smith in their estate plans and thus have joined The Grécourt Society. We currently have <<X>> members of the society. Since <<DATE>>, our class has funded <<X>> gift annuities totaling \$<<X>>. We have also received <<X>> bequests totaling \$<<X>>. Thank you from the college, from the students (present and future) and from me.

If you are interested in funding a Charitable Gift Annuity, you may be interested to know the current rates:

- Age 87 <<X>>%
- Age 88 <<X>>%

The Gift Planning office updates its website regularly, smith.plannedgiving.org. It features many user-friendly functions to guide potential donors to information needed to make donations to Smith. You may also contact the Gift Planning staff directly as they would be delighted to hear from you and answer any questions you may have. They can even provide you with a personalized gift illustration.

<<PLANNED GIVING CHAIR NAME>> Planned Giving Chair <<CLASS YEAR>>

Example 2

Please visit Gift Planning's website smith.plannedgiving.org for good information about including Smith in your financial planning. Current rates for an immediate Charitable Gift Annuity are:

- Age 75 <<X>>%
- Age 76 <<X>>%
- Age 77 <<X>>%

<<X>> percent of the Class of <<CLASS YEAR>> have informed Smith they are named in their financial plans and are members of The Grécourt Society. Won't you consider this step too?

<<PLANNED GIVING CHAIR NAME>> Planned Giving Chair <<CLASS YEAR>>

Example 3

Please visit Smith's Gift Planning office's website at smith.plannedgiving.org where you can find a wealth of information about including the college in your financial planning, such as

- Check current annuity rates (at least a <<X>>% return on investment!)
- Use a gift calculator for the different gift options;
- View the college's suggested bequest language
- Download Smith's updated Estate Plan Intentions form
- Join The Grécourt Society

<<X>> percent of the Class of <<CLASS YEAR>> have included Smith in their financial planning and are members of The Grécourt Society. Won't you consider taking this step too?

<<PLANNED GIVING CHAIR NAME>> Planned Giving Chair <<CLASS YEAR>>

Example 4

As our Reunion approaches, I want to thank all our classmates who have funded life income gifts or named Smith in their estate plans and thus have joined The Grécourt Society in the last 5 years and in the years before I became your Planned Giving Chair. Our class has funded <<X>> gift annuities since our last reunion (and <<X>> of those were funded in fiscal year <<YEAR>>). Thank you from the college, from the students (present and future) and from me.

The Gift Planning Department updates its website regularly- please visit smith.plannedgiving.org. It features many user-friendly functions to guide potential donors to information needed to make donations to Smith.

<<PLANNED GIVING CHAIR NAME>> Planned Giving Chair <<CLASS YEAR>>

Example 5

Planned Giving continues to be a good option for all of us. At age 75 the rate for an immediate charitable gift annuity is <<X>>%. You could also fund a deferred payment gift annuity where the longer you defer receiving the income, the higher your rate. Please visit the Gift Planning website at <https://smith.plannedgiving.org> for more information on rates or to experiment with the planned giving calculator.

If you have left Smith in your will or retirement plan, you are eligible to join The Grécourt Society. Please notify the Gift Planning office so that we can welcome you to this honorary society.

Thanks to all who have already remembered Smith, and I hope there will be more in the future.

<<PLANNED GIVING CHAIR NAME>> Planned Giving Chair <<CLASS YEAR>>

Example 6

As we approach our <<X>> reunion the idea of planning will certainly be on the forefront of many of our minds. Whether we are planning our trip to campus, the outfit we will wear in the Ivy Day parade or the gift we will give the college, certainly a lot of thought will go into our actions.

I encourage those of you who have not thought about the planned giving opportunities available to you to do so now. For example, a charitable gift annuity is a wonderful opportunity to make a gift to the college while also receiving a fixed stream of income. The income tax deduction and fixed payout rate, currently <<X>> % for age 71, make this a very attractive gift. Gift annuities and all other life income gifts are credited toward our comprehensive class gift.

Another opportunity available for gift planning is naming the college as a beneficiary of your will, retirement plan or life insurance policy. As a school founded by a bequest, the college is always particularly grateful for the planning many alumnae do to include the college in their estates.

I thank those of you who have already joined the Grécourt Society, which is the college's recognition society for those of us who have utilized these planned giving techniques. If you have not already joined, but have used these techniques please let the college know.

To learn more about gift planning techniques, contact Smith's Gift Planning Office at (800) 241-2056 (option 5) or visit the college's website at <https://smith.plannedgiving.org>. Whatever planning you do for Smith, the college is grateful.

<<PLANNED GIVING CHAIR NAME>> Planned Giving Chair <<CLASS YEAR>>

Example 7

Planning Benefits You and Smith

At our age we should all have wills, health care and durable powers of attorney in place. Without a will the state will determine the disposition of most assets. The choice is yours to plan and update your documents on a regular basis to reflect life changes. Planning also includes designating beneficiaries for life insurance and retirement plans. Remember that backups are very important and always select both primary and contingent (secondary) beneficiaries.

And when you are engaged in this process, please don't forget to think about Smith. If you have recently recognized the college in your will or as a beneficiary, please join The Grécourt Society by calling 800-241-2056 option 5 or visit <https://smith.plannedgiving.org/smith/giving/2.html>. These planned gifts are important and the college does not ask for any specific documentation. If you are interested in making a planned gift that may return income during your retirement, please visit the deferred charitable gift annuity (DPGA) on the Smith website at <https://smith.plannedgiving.org/smith/articles/19.html>.

Example 8

~ Class Newsletters

Many more of you are submitting information to be included in your class newsletters. Thank you for taking the initiative and helping to promote planned giving to your classmates. We thought it might be helpful for you to read what Pamela Smith Henrikson '62, Planned Giving Chair for The Class of 1962 as well as Chair of The Grécourt Society, submitted for her class newsletter. We hope this might inspire you to share your story.

NEWS FROM GIFT PLANNING: Pamela Henrikson Class of 1962

"I have just had the bittersweet experience of writing to the sister of one of our classmates in gratitude for her sibling's realized bequest to Smith. It came as a complete surprise: The Grécourt Society knew nothing of her intent. It was my first, but I know not my last, letter acknowledging a realized bequest, and my emotions were mixed: first sorrow at having lost a classmate, then joy for her generosity to the college, and finally sadness that we never expressed appreciation directly to our own classmate for her magnanimous plan.

Bequests are important to the financial strength of Smith. For the last ten years the college has received realized bequests of \$<<X>> Million annually. This year Smith has been given more than \$<<X>> Million! I am tremendously grateful that over fifty members of our class have already provided for Smith in their wills or by planned gifts.

Bequests and planned gifts are powerful ways to show our appreciation for the excellent education that we received in the 1960s and to ensure that deserving young women in the 21st century can experience the same superb education. If you do make or have made a bequest (or planned gift) to Smith, please let us know. We want to be able to thank you and welcome you to The Grécourt Society."