

## Reunion Fundraising FAQs

### What Counts as a Reunion Gift?

- All gifts to any designation (including the Bates Fund, current capital projects, restricted uses or named endowed funds) made before June 30, 2015. **The focus of the Reunion Gift Committee is to raise unrestricted gifts for the Bates Fund.**
- Multi-year pledges (total amount of pledge) to any designation (including the Bates Fund, current capital projects, restricted uses or named endowed funds) made before June 30, 2015.
- Planned gifts
- Face value of all assets used to establish (or make additions to):
  - Charitable Gift Annuities
  - Charitable Trusts (internally and externally managed)
  - Pooled Income and Pooled Growth Funds

### What Assets May be Used?

- Cash or credit card gifts
- Appreciated securities
- IRA distributions
- Life insurance
- Real estate, partial or future interests in real estate
- Tangible personal property
- Closely held stock or business interests

### How Can I Make a Gift?

Donors may take advantage of a variety of giving vehicles available at Bates. Using alternative giving methods often enables donors to make larger gifts than they might have thought possible.

- **Credit Card.** Donors may give securely online at [www.bates.edu/give](http://www.bates.edu/give) or by calling 1-888-522-8371.
- **Check.** All checks should be made payable to “Bates College” and mailed to: The Bates Fund, Bates College, 2 Andrews Road, Lewiston, Maine 04240.
- **Bates Beacons Recurring Giving Program.** The Bates Beacons Recurring Giving program allows alumni to divide their gift into manageable increments through automatic deductions from your credit card or checking account. It’s convenient, and the money Bates saves on donor mailings can go where it really counts; into teaching, campus improvements and financial aid.
- **Appreciated Securities.** Many donors have been able to make a larger gift than they imagined by giving appreciated securities. In most instances, a gift of stocks, bonds or mutual fund shares, if they have appreciated in value, is more advantageous than a gift of cash because the donor avoids paying capital gains taxes.
- **Matching Gifts.** Many corporations have established matching gift programs in which the company matches employees’ gifts to non-profit organizations. Some companies will even match a gift made by a retired employee or the spouse of an employee. Donors should consult with their employers’ human resources office for specific information on how to get a match for Bates.
- **Life Income Gifts.** Many donors find they can make a larger gift in honor of Reunion by establishing a life-income gift such as a charitable gift annuity or charitable trust. These gifts provide attractive income, substantial tax deductions, and a wonderful remainder gift to Bates.

- **Bequests and Beneficiary Designations.** The Office of Gift Planning has wonderful resources to help donors make tax-smart estate plans. A donor can consider naming Bates as a beneficiary of their will or living trust, or designate Bates as beneficiary of a retirement account, IRA, bank account, commercial annuity or life insurance policy.
- **Real Estate or Tangible Personal Property.** Some of your classmates may have assets or property that are no longer of use and are expensive to maintain or insure. The Office of Gift Planning can help interested alumni understand how to use such assets to make an extraordinary gift to Bates and receive valuable tax deductions as a benefit.

### **Why Support the Bates Fund?**

The majority of classmates will make their Reunion contribution to the Bates Fund. The Bates Fund helps to make up the difference between the comprehensive fee and the actual cost of educating each Bates student. The Bates Fund supports everything from financial aid to student research grants, to faculty salaries and curriculum development, to athletic teams and dance performances.

Annual giving is crucial to maintaining Bates' intellectual vitality, faculty excellence, diverse student population, residential life and campus facilities. Gifts to the Bates Fund provide essential support that can be spent immediately on the college's most important priorities — financial aid, academic quality and the learning experience, student life and campus revitalization.

### **What is the Mount David Society?**

Launched in 2004, the Mount David Society recognizes alumni and parents who make annual unrestricted gifts in excess of \$1,855 to the Bates Fund.

#### *Mount David Society Leadership Giving Levels:*

##### *President's Associates*

\$10,000 level

\$25,000 level

##### *Founder's Associates*

\$1,855 – \$9,999

#### *Bates Fund Named Scholars Program*

Through the Named Scholars Program, donors may name a current-use scholarship after themselves or a loved one with an annual gift of \$5,000 or more to the Bates Fund.

### **What is the Phillips Society?**

The Phillips Society honors alumni, parents, and friends who have the vision and generosity to make Bates a part of their legacy by establishing life income gifts, such as charitable gift annuities and trusts, or by naming Bates as a beneficiary of their estate through will or living trust. Many of our alumni have discovered that partnering with Bates to establish a life-income gift allows them to make a larger gift to the college than they thought possible. In addition, many alumni appreciate the opportunity to exchange certain assets for a steady stream of income and substantial tax benefits.

### **How do I find more information about Bates today?**

For current news about Bates, please visit [www.bates.edu/news](http://www.bates.edu/news).