

A P H I L A N T H R O P I C G U I D E



FOREVER VALPO

THE CAMPAIGN FOR OUR FUTURE

A photograph of three students walking on a campus path. On the left, a woman with dark hair, wearing a black jacket, blue jeans, and a blue face mask, is walking towards the right. In the center, a man with glasses and a beard, wearing a grey sweater, blue jeans, and a blue face mask, is walking towards the right. On the right, another man with short hair, wearing a grey zip-up jacket, blue jeans, and a blue face mask, is walking towards the right. The background shows a modern building with large windows and a green awning. The ground is covered with fallen autumn leaves.

LARISSA PTAK

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I am so very grateful for my scholarship. I am putting myself through college and the aid allows me to focus on my classes, clubs, and other activities instead of working multiple jobs. I hope that I am able to spread as much positivity and support as I have received at Valpo. Thank you!

– LARISSA PTAK, CLASS OF 2022
ELECTRICAL ENGINEERING AND GERMAN

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JORDAN SHEETS

“

I am fortunate to attend Valpo and receive a generous scholarship. I have found a community of peers and faculty that challenge me, support me, and share the same passion for knowledge. I can't wait to experience the rest of my path here at Valpo.

– JORDAN SHEETS, CLASS OF 2023
ACCOUNTING

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TODAY

more than 3,000 Valparaiso University students prepare for a journey of service and intellectual discovery in a world where these pursuits are increasingly rare. Challenged by dedicated faculty members and pushed to excel by their classmates, our students live and learn on a campus that embraces faith and inspires leadership.

With the understanding that every generation supports those who follow, opportunities abound to make a difference for today's students and faculty at Valpo. From endowed scholarships and faculty positions, to annual support of the Valpo Fund or a Dean's Fund, you will find a philanthropic option that meets your charitable priorities.

This publication is a helpful guide as you begin to weigh important charitable decisions through conversation with the University's Advancement office. As always, you are encouraged to seek independent counsel on these matters from a trusted financial advisor, as every situation is unique.

Thank you for your ongoing support of and commitment to Valparaiso University.

TYPES OF GIVING

Gifts of cash

Cash is the simplest, most direct, and most popular type of charitable gift. Checks should be made payable to Valparaiso University and mailed to:

Valparaiso University
Advancement
1100 Campus Drive South
Valparaiso, IN 46383-9930

Securities

Many donors consider gifts of appreciated securities to reach their charitable goals. Appreciated securities are often used in place of cash so you gain the added benefit of bypassing capital gains liabilities on the asset. Gifts of stocks and bonds may be made in several ways. The most common practice is to place the securities with your broker or bank, with a request that Valpo be notified of your intention to make this gift. A University representative will then work directly with your representative to transfer the securities.

IRA Charitable Rollover

For those age 70½ or older, you may transfer up to \$100,000 each year to charity without it being treated as a taxable distribution. This opportunity, known as the IRA charitable rollover, was made permanent through the Protecting Americans from Tax Hikes (PATH) Act of 2015, which was signed into law by the president on Dec. 18, 2015.

Real Estate and Other Personal Property

Do you have a vacation home that you do not use? Many donors have physical assets and personal property that can be utilized in meeting charitable goals. Gifts of real estate, equipment, art, and other personal property may be made to the University. Valpo's Advancement staff would be more than happy to answer any questions about these asset types and how they can be used in charitable ways.

Matching gifts

Corporate matching gifts count toward your total gift to the University and may significantly increase your commitment. Please remember to inquire with your employer's human resources office about this great opportunity.

Pledges

Often, it is possible to achieve a more significant impact with your philanthropy through a pledge. Valpo encourages pledges be made if your desire is to fund a gift over a period of time. You may make a charitable commitment that is payable over a multi-year period of up to five years.

Planned gifts

Planned or deferred gifts allow you to make a significant gift that will benefit the University at a point in the future. For many donors, it is a way to make a larger gift than possible during life. Valpo welcomes the opportunity to work with you and your legal and financial advisors to establish planned gift arrangements that meet your charitable goals.

In many cases, planned gifts and life-income gifts, such as charitable trusts and gift annuities, may offer you and your heirs substantial tax advantages and financial benefits, such as increased spendable income or lower estate tax liability. You should always consult your own advisors as to the specific tax consequences and benefits of making planned gifts, as situations vary.



Planned Giving Opportunities

BEQUESTS

A bequest is the easiest and most popular type of planned gift. Leaving Valpo a percentage of your estate rather than a fixed amount is generally the best way to ensure that your wishes for estate distribution occur as planned.

RETIREMENT PLANS

One of the easiest ways to support Valpo is through your retirement or pension plan. Since Valpo is tax-exempt, you can use your retirement plan to make a significant gift to support the University. Following your death, the designated portion of the funds will be paid to Valpo in a lump sum, completely tax-free. Giving from a retirement plan is easy because you don't have to change your will or trust.

CHARITABLE GIFT ANNUITIES

Charitable gift annuities are a popular gift vehicle due to their fixed payout rate and favorable taxation. To establish a charitable gift annuity, you make a gift of cash or marketable securities to Valpo. In exchange, the University contractually guarantees to pay you a fixed quarterly income for the rest of your life. Two-life arrangements are available to plan for a surviving spouse as well.

CHARITABLE REMAINDER TRUSTS

Charitable remainder trusts provide you, or other beneficiaries, income for life while leaving the charitable remainder to the University at the end of the trust. There is also the possibility of trust growth, offering a hedge against inflation.

CHARITABLE LEAD TRUSTS

Donors who are looking to meet their philanthropic goals while planning for family members and heirs may consider a charitable lead trust. Charitable lead trusts provide income to the University for a set term of years, after which the remainder is transferred to your designated family member or heir, often with significant tax benefits.

LIFE INSURANCE POLICIES

Many donors choose to utilize life insurance to meet their charitable goals, whether they are new policies taken out explicitly for charitable purposes or older policies that are no longer needed. You have many options regarding gifts of life insurance. Our gift planning office professionals would be happy to discuss what might be possible through this often underutilized asset.

FUNDING PRIORITIES

1

SCHOLARSHIPS TO SUPPORT STUDENTS OF PROMISE

Valparaiso University is the perfect university for an extraordinary kind of student — not just the best and brightest, but women and men of character, students of promise, who have a propensity to lead and a desire to serve. The endowed scholarships established by *Forever Valpo — The Campaign for Our Future* will provide a permanent source of support for students from across the socioeconomic spectrum to attend Valpo, to flourish at Valpo, and to follow generations of alumni into lives of compassionate leadership in all walks of life.

2

SUPPORT AND SHAPE THE FACULTY OF THE FUTURE

Great teaching is a hallmark of a Valpo education. Each graduate can recall a faculty member who inspired them and changed their life for the better. With half of Valpo's faculty reaching retirement age within the next decade, it is now time to shape the faculty of the future. The endowed funds secured by *Forever Valpo* will reward faculty for their scholarship and accomplishments, compensate them at competitive levels, and provide them with exceptional opportunities for professional advancement.

3

PREPARE ALL STUDENTS TO LEAD AND SERVE

Gifted and passionate faculty, combined with outstanding students and exceptional facilities, are key components in establishing programs of excellence. Throughout the years, many Valpo programs have achieved distinction, noted for their historic strength, their strategic significance, and the new ground they break. *Forever Valpo* will secure endowed funds to build on this success by both supporting and establishing programs that will take their place among the very finest in the world.

Simple Bequest Language to Use when Including Valpo in your Will

UNDESIGNATED BEQUEST:

I give, devise and bequeath to The Lutheran University Association Inc. d/b/a Valparaiso University, a non profit corporation existing under the laws of the state of Indiana and located in the city of Valparaiso, Indiana, _____ (fill in a percentage of your estate, a certain sum of dollars or a description of particular property), to be used as its Board of Directors determines to be its area of greatest need.

DESIGNATED BEQUEST (for scholarship endowment):

I give, devise and bequeath to The Lutheran University Association Inc. d/b/a Valparaiso University, a non profit corporation existing under the laws of the state of Indiana and located in the city of Valparaiso, Indiana, _____ (fill in a percentage of your estate or a certain sum of dollars). I further direct that it shall be placed in Valparaiso University's endowment to be used for scholarship and pursuant to The (Name) Endowed Scholarship as set forth by a Gift Agreement executed between me and Valparaiso University and which is incorporated by reference into this document.

DESIGNATED BEQUEST (for other specific purpose):

I give, devise and bequeath to The Lutheran University Association Inc. d/b/a/ Valparaiso University, a non profit corporation existing under the laws of the state of Indiana and located in the city of Valparaiso, Indiana, _____ (fill in a percentage of your estate or a certain sum of dollars). I further direct that it shall be used for _____ (fill in specific use) as set forth by a Gift Agreement executed between me and Valparaiso University and which is incorporated by reference into this document.

RESIDUAL BEQUEST:

All the rest, residue and remainder of my estate, both real and personal, wherever located, I give, devise and bequeath to The Lutheran University Association Inc. d/b/a Valparaiso University, a non profit corporation existing under the laws of the state of Indiana and located in the city of Valparaiso, Indiana.

For additional information:
valpo.giftplans.org



BETH SCAGLIONE-SEWELL

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We don't accept students and not provide what they need to succeed. They chose us; we also chose them. They can trust their professors to help them in every way they can. If they need a little more, all they need to do is ask.

— BETH SCAGLIONE-SEWELL, PH.D., PROFESSOR OF BIOLOGY AND DIRECTOR OF THE UNDERGRADUATE ANATOMY LAB

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GIFTS

RESTRICTIONS AND DESIGNATIONS

Unrestricted Gifts

Unrestricted gifts are especially beneficial to Valpo. These give the University the flexibility to take advantage of special opportunities and to meet emergency needs. The Valpo Fund represents a substantial source of unrestricted giving to the University on an annual basis.

Restricted Gifts

You may restrict your gift for a special use, such as scholarships, faculty development, and program support consistent with the University's priorities. Members of the Valpo Advancement office would be happy to discuss these opportunities with you.

Designated Gifts

Donors may further designate gifts, including those for unrestricted use or for a particular academic division of the University. Gifts that are restricted for a specific use, such as scholarships, may also be designated for a particular department or program.



RECOGNITION SOCIETIES

The Kretzmann Society: A Legacy of Light

The Kretzmann Society recognizes those individuals who have made estate plans or established life-income gifts to benefit Valparaiso University. Membership in the Kretzmann Society has no minimum gift level, as each commitment represents a lifetime commitment to Valpo — a legacy of light for future generations. Your future gift provides you the opportunity to support students in pursuit of a Valparaiso University education.

We invite you to join other Valpo friends who have remembered the University in this special way. If you have already made plans through your estate to support Valpo, we say thank you for joining with nearly 1,200 alumni, parents, and friends who are Kretzmann Society members.

The President's Circle: Valpo Fund Leadership

Members of the President's Circle are defined by their consistent leadership and service to Valparaiso University. They demonstrate a tangible interest in shaping the future of the University and leading the efforts of fellow alumni, parents, and friends.

Unrestricted annual gifts of \$1,000 or more to the Valpo Fund support the most critical and enduring needs of Valparaiso University in the areas of:

- Scholarships
- Student experience
- Lutheran ministries
- Academic excellence
- Strategic priorities

Members know their gift enhances the continued success of Valparaiso University. President's Circle members receive special invitations to events, recognition in the Honor Roll of Donors, and special correspondence from the president of the University. With a membership of \$5,000 or more, a named scholarship will benefit a deserving Valpo student.

Valpo student.

The President's Circle Lifetime Membership



President's Circle Lifetime membership recognizes and honors Valparaiso University's most generous donors for their cumulative and consistent support. The Lifetime members of the President's Circle are the philanthropic leaders of Valparaiso University, and their impact is significant. Many members have established endowed scholarship funds to benefit our remarkable students, some have given to endowed faculty support, and others have achieved their Lifetime status solely through their longstanding support of the Valpo Fund. This society honors donors who have cumulatively given \$100,000 or more in any of the following forms: planned gifts, outright gifts, new pledges, and matching gifts.

Lifetime membership in the President's Circle includes eight recognition groups based upon total cumulative gifts and commitments:

Century Level:	\$100,000,000+
Visionary Level:	\$50,000,000 – \$99,999,999
Luminary Level:	\$25,000,000 – \$49,999,999
Ambassador Level:	\$10,000,000 – \$24,999,999
Fellow Level:	\$5,000,000 – \$9,999,999
Benefactor Level:	\$1,000,000 – \$4,999,999
Leader Level:	\$500,000 – \$999,999
Legacy Level:	\$100,000 – \$499,999

The President's Circle Lifetime members play a large role in bringing to life the mission of Valpo and enabling the values of service, leadership, generosity, faith, and integrity to thrive.

VALPARAISO UNIVERSITY



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