



FOR THE
GREATER GREAT

THE VILLANOVA CAMPAIGN TO
IGNITE CHANGE

PLANNED GIVING
BEQUESTS



VILLANOVA GENERATIONS

As a Villanovan, you have benefitted from a long tradition of giving, supported by generations who came before you. Always mindful of the generations to come, hundreds of Villanovans—alumni, parents, faculty, staff and friends—have been inspired to build their legacy and make a substantial impact on the lives of students. How will you create your legacy at Villanova? It may be easier than you think.

Bequests have helped shape the character of Villanova University since its founding in 1842. The core of the property the University sits on today was initially bought through an estate sale by a group of Augustinians, and later significantly enlarged through the bequest of adjacent property owned by a family deeply committed to Villanova.

Following in the footsteps of that bequest, Villanovans have been securing the future of generations to come through planned gifts to the general endowment, establishing scholarships and endowing professorships and programs. You, too, can be part of this wonderful tradition through your bequest.

WHAT IS A BEQUEST?

A bequest is a gift that comes from your estate and is designated through your will or trust. The gift can be a transfer of cash, securities, or other kinds of property. You can make a bequest to Villanova by simply including language in your will or trust leaving a portion or percentage of your estate to the University, or by naming Villanova as a beneficiary of your retirement account or life insurance policy.

Remembering Villanova with a bequest from your estate will help sustain and strengthen the University in years to come. Some of the benefits of creating a bequest to Villanova include:

- A bequest costs nothing now, yet gives you the satisfaction of knowing you have provided for future generations of Villanovans.
- You retain complete control and use of your assets during your lifetime.
- You may modify your bequest if your circumstances change.
- Gifts to Villanova from your estate are exempt from federal estate taxes.
- If you inform Villanova of your plans, you will be honored as a member of the 1842 Heritage Society.



“Villanova provided me with not only broad liberal arts knowledge and technical business skills that proved essential in establishing me in my career, but also core values and close friendships that sustain me today. I am proud to be a graduate of a University that continues its tradition of educating first generation college students from working families. That’s how I came to Villanova, and why we enthusiastically support the University now and through a bequest in our estate plan.”

– John Thacker '84 VSB and Kimberly Thacker P '13
Members, 1842 Heritage Society



The 1842 Heritage Society honors individuals who pledge to support the University through estate gifts, life-income gifts or the transfer of assets. Members enjoy special recognition events and communications from the University president.



MAKING A BEQUEST

A bequest to Villanova can be made for a specific amount, for a percentage of your estate, or for all or a portion of what remains after bequests to your family. To make a gift to Villanova from your estate, you need to sign a new will or living trust instrument, add a codicil to your present will, or make an amendment to your present trust instrument.

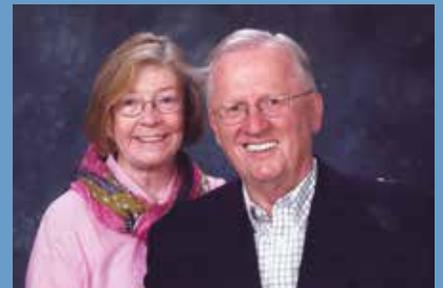
As an alternative, you can simply designate Villanova as a beneficiary of a retirement plan or life insurance policy. To do so, contact the retirement plan administrator or life insurance company and complete the appropriate beneficiary designation form.

The Office of Planned Giving will provide either a Bequest Intention Form or revocable Gift Agreement. The Planned Giving staff will assist you in designating the specific purpose of your gift using one of these forms.

PLANNING YOUR BEQUEST

When planning for a bequest, you will need to consider how you would like your gift to be used to benefit Villanova—whether for an unrestricted purpose, in which case it will be used where Villanova determines the greatest needs are, or restricted to a specific college and/or purpose. Some gifts can also establish an endowed fund that will last in perpetuity.

- **An unrestricted bequest** allows the University to determine how to use the funds based on a careful assessment of its most urgent needs. Unrestricted bequests are extremely valuable because they provide Villanova the greatest flexibility in responding to future needs.
- **A restricted bequest** directs your gift to a specific fund, college, or particular purpose or need that you are most passionate about. Because restricted gifts are unique, Villanova encourages donors considering this type of gift to speak with a member of the Office of Planned Giving about the appropriate language.
- **An endowed fund** provides income every year in perpetuity to carry out the designated purpose of the fund. Please note that endowed funds do have minimum required amounts. A staff member of the Office of Planned Giving can assist you if you are considering this type of bequest gift.



“Villanova has played an important role in our lives. We wanted to create a fund that would help graduates of Philadelphia’s Catholic high schools attend the University. Since we wanted to be here to see some actual results, we also committed to an annual contribution during our lives which would assist current students.”

— Joe Hagan '63 COE and Kathy Hagan '64 CON
Members, 1842 Heritage Society

ONLINE RESOURCES

The Office of Planned Giving has a number of tools available online to help you consider your gift options, as well as information on estate planning and taxes.

Find these and more at www.villanova.edu/plannedgiving

CONTACT

The Office of Planned Giving is happy to help you explore options for designating a bequest to Villanova that will best meet your needs and goals.

www.villanova.edu/plannedgiving

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Those considering a planned gift should consult their own legal and tax advisors. The staff of the Office of Planned Giving welcomes the opportunity to speak and work with your advisors.

ADDRESS

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Villanova's Legal Name:
Villanova University in
The State of Pennsylvania

Villanova's Federal Tax ID#:
23-1352688



VILLANOVA
UNIVERSITY

A LASTING LEGACY

If you are considering establishing an endowed fund through your bequest, there are a number of possible purposes. Some of the most common options include:

- Endowed chairs
- Endowed professorships
- Academic scholarships
- Athletic scholarships
- Academic and programmatic initiatives
- Annual Fund

An endowed fund created by your bequest can carry your name or the name of your family member or other person you would like to honor. Named funds, because of the support they offer to people and programs, are a wonderful way to share what is most meaningful to you within the Villanova community with generations of Villanovans to come. A staff member of the Office of Planned Giving can assist you if you are considering this type of bequest gift.



Rev. Peter M. Donohue, OSA, University President

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In October 2013, Villanova University embarked on a historic comprehensive capital campaign to raise \$600 million that will expand the University's national reputation and ensure that Villanova offers a premier academic and learning environment for decades to come.

Bequests comprise a significant portion of funds raised for the campaign, and they are essential to fulfilling our campaign goals. Your intended bequests can directly contribute to the greater great—leaving a legacy for future generations.

More information about The Villanova Campaign to Ignite Change can be found at www.forthegreatergreat.com. You can also contact the Office of Planned Giving to discuss how your bequest can benefit this campaign.

LET US THANK YOU

If you have included Villanova in your estate plans, please let someone in our Office of Planned Giving know. We would like to thank you for your generosity and faithfulness. We would also like to ensure that the purpose of your gift is clearly understood by the University and we would like to welcome you as a member of the 1842 Heritage Society.