



**BALL STATE
UNIVERSITY
FOUNDATION**

BENEFICENCE NEWSLETTER

FALL/WINTER 2021

Taking Care of Family

The lights came down, the curtain rose, and playing opposite each other on the musical stage were Jonathan, '10, and Jessica, '08, not yet sharing their last name. A self-described “showmance,” their budding romance would coalesce during their time and tenure at Ball State University as students within the Department of Theatre and Dance.

The pair have stayed connected to their alma mater, and the faculty and staff that have become dear mentors and friends, throughout their lives. Inspired by their time at the school, their passion for their craft, and their desire to pay forward the opportunities presented to them by Ball State, Jonathan and Jessica chose to participate in the planned giving program offered by the Ball State University Foundation.

“We [chose to] give to the department that gave us so much,” says Jessica.

“Taking care of family—and each other—was the most important reason for us to establish substantial insurance policies,” says Jonathan. “As very active runners, cyclists, and general lovers of the great outdoors, having a safety net was vital to the well-being of our family, child, and loved ones.”

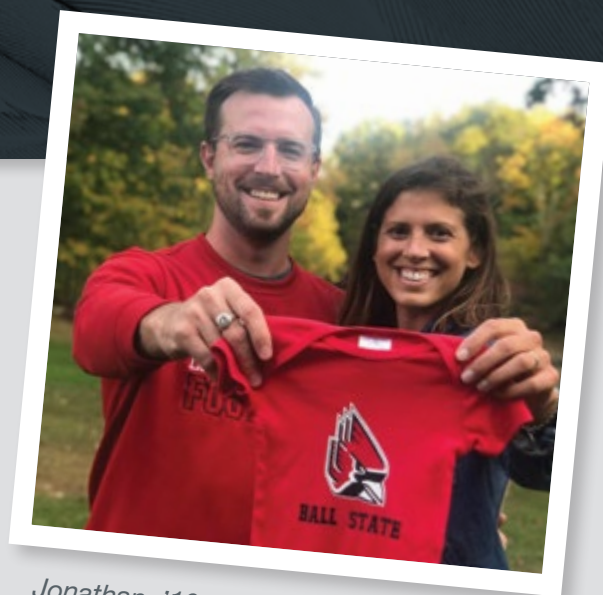
Jonathan sees the planned gift to the University as a bonus consequence if he and his wife’s insurance policies come into effect. The pair have chosen several groups as benefactors for their policy, including Theatre and Dance, alumni, and former University employees.

For more than five years, Jonathan and Jessica have been active and thriving members of Theatre and Dance’s alumni

society. Their involvement has kept their family intimately connected with the department since graduation through reunions on campus with classmates, staff, and professors who have subsequently spread throughout the nation to the theater-laden towns of New York, Chicago, and Los Angeles. Their planned gift allows them to strengthen that connection by designating funds to inspire other young alumni to think of Ball State while making long-term plans to support the University.

Regarding the ease of establishing and setting up their gift, Jonathan says, “Once we had our insurance plans all set, it was effortless to designate the Foundation and the Department of Theatre and Dance as beneficiaries of the plans. The team at the Foundation was super helpful at guiding us through the process with our broker.” With the paperwork out of the way, the duo can rest soundly with the peace of mind that comes with knowing that they can make a difference in a student’s life in the future.

Continued inside



Jonathan, '10, and Jessica, '08, Jensen

A NEW WAY TO BEGIN

This year, give yourself the gift of peace and predictability. With so much uncertainty in the world, would you like the comfort of beginning this year (and every year) with a more certain future?

We have tools and ideas that will help you bring more reliability and dependability to your year and your life.

A more dependable new year gives you:

- Income tax savings
- Capital gains tax savings
- New payment streams for you and your spouse



Each of the following are powerful tools to help you craft a dependable future for yourself:



CHARITABLE REMAINDER UNITRUST

Transfer appreciated stock to this trust without paying capital gains, then get an income stream and other tax benefits for the rest of your life



CHARITABLE GIFT ANNUITY

Fund a charitable gift annuity with us and receive favorable fixed rate payments for life. You also receive an income tax deduction this year



LIFE ESTATE

Transfer title from your house or other property to charity and continue living there for life, while receiving income tax benefits today

We can help you create a future where you will receive dependable tax benefits.

With the right tools, such as a charitable gift annuity, you receive reliable payments in the same amount every year for as long as you live.

While the future is never predictable, parts of it can be

AN EASY PLAN

Sometimes a little planning gives big benefits. Many people believe that for a plan to have value, it must be long and complicated. It does not need to be. Some of the most significant planning can be done in a few moments.

Many of us want to provide for our family and the causes we cherish but don't want the hassle of amending or updating our wills or estate plans. While an up-to-date will is important, you can accomplish many of your goals outside of your will.

Some of your
biggest assets can be
handled outside your will

Think about where you have most of your assets:

- Savings account
- Checking account
- Investment account
- Retirement account: IRA, 401(k), 403(b)

Most of your assets are probably held in one or more of these accounts. If you plan to leave funds from any of them to your family or to the causes you support, you can make your designation with a simple form.

Contact your account administrator and ask for a beneficiary designation form or payable on death form. No matter what your administrator calls it, this allows you to transfer assets automatically when you pass away.

You can change your mind and change this form quite simply. You can also designate percentages (for example, 50 percent to your spouse and 25 percent to each of your two children). While these can be given outside your will, it should still be a part of your larger plan, so be sure to check with your attorney or accountant to make sure these designations support your larger goals.

Create a
big plan in
10 minutes
with a
simple form



After so much challenge the last few years, we want to thank you for everything you do for Ball State. The last three years in a row, the Cardinal family has given generously and stepped up to take our beloved Ball State University to new heights. We have sustained three years of more than \$30 million dollars in private philanthropic support from alums and friends to create scholarships, endow professorships, improve our facilities, and enhance our beautiful campus. In short, your gifts provide a better future for our students.



I hope you enjoy reading about the Jensens. Their passion for Ball State and responsibility as new parents propelled them to think about their future and make sure that they had a plan in place for their growing family. Planned giving need not be complicated—most folks can simply name their favorite charity to receive a portion of an existing plan on a beneficiary form. However, we’re here to talk through more complex planning needs and help you create a legacy gift that suits the needs of your family and your budget. Please email us at any time at giftplanning@bsu.edu to start the conversation, or you can visit our website at ballstatelegacy.org. Stay safe, and thank you!



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Fold in half and tape shut.

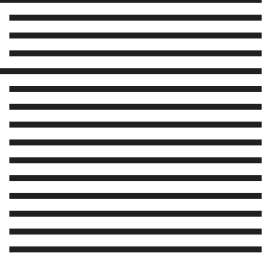


**NO POSTAGE
 NECESSARY
 IF MAILED
 IN THE
 UNITED STATES**

BUSINESS REPLY CARD

FIRST CLASS PERMIT NO. 307 MUNCIE, INDIANA

POSTAGE WILL BE PAID BY ADDRESSEE



115009
 ASSISTANT VICE PRESIDENT FOR DEVELOPMENT
 BALL STATE UNIVERSITY FOUNDATION
 BALL STATE UNIVERSITY
 MUNCIE IN 47306-9986



“Taking Care of Family” (continued)

The Department of Theatre and Dance provides their students the opportunity to learn from nationally recognized faculty, guest artists, and industry professionals, allowing them to extend their classroom knowledge and skills into the real world. They offer a full selection of new, original, and published performances each academic year. For more information on how to make a gift to the Department of Theatre and Dance, or any of your favorite Ball State programs, contact or visit us at ballstatelegacy.org.



MAKE A LASTING IMPACT AT BALL STATE UNIVERSITY

Thank you for your interest!

- I would like to receive a copy of the **complimentary** guide, ***New Year, New Future***.

- I would like a no-obligation illustration of how a charitable gift annuity can benefit me. Please use a gift amount of \$_____ and birth date(s) ____/____/____ (and ____/____/____).

- I would like sample language to share with my attorney for including a gift in my will or living trust.

- I have already included a gift to the Ball State University Foundation in my will or estate plans and haven't yet notified you.

Name (please print)

Telephone

Email

Address

City

State

ZIP



BALL STATE UNIVERSITY

Foundation

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ballstatelegacy.org

A BENEFIT FOR LIFE

It is always nice to receive a gift, but what if you receive one knowing that gift will repeat for as long as you live? A charitable gift annuity gives you that benefit for life.

When you fund a charitable gift annuity, you receive payments from us for as long as you live. The payments are at a favorable fixed rate based on your age and will never change no matter how long you live or what the economy does. The favorable rates can be even higher if you choose to delay the first payment.

When you fund a charitable gift annuity, you also receive an income tax deduction this year for part of the funding amount. You may also receive capital gains benefits if you transfer the appreciated stock directly to us to create the charitable gift annuity. You can fund a charitable gift annuity for yourself or you and your spouse. There are other options as well. Call or email us to learn what your exact rate and tax savings will be.

You cannot outlive
the benefits



Your payments are
made at favorable
fixed rates