

No one with a plan **ever** wishes they did not have one.



WHAT IS *ForeSight*?

ForeSight is Union Adventist University's legacy society that honors those who have generously provided for the mission of Union through a will, trust or other planned gift.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

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DO YOU HAVE *ForeSight*?

Please contact me with more information on including Union in my estate plan.

I have already included Union in my estate plan.

Add me as a *ForeSight* member to be listed in Union's publications.

Add me as an Anonymous member.

The best way to contact me is by:

Email Mail Telephone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

All inquiries are treated with complete confidentiality.

This information is not intended as tax, legal, or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

UNION
ADVENTIST UNIVERSITY

Union Adventist University
3800 South 48th Street,
Lincoln, NE 68506-4386
402-486-2600 Ext. 2200
ken.farrow@uau.edu
unionlegacy.org

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YOU CAN SHOW

ForeSight...



UNION
ADVENTIST UNIVERSITY

IT TAKES *ForeSight* TO BE A FAITHFUL STEWARD

GIFTING FINANCIAL ASSETS

Retirement Plans - This is perhaps the most tax-efficient estate planning option. By naming Union Adventist University as a beneficiary of your retirement plan your family members can avoid paying elevated income taxes, as high as 37%.

Bank Accounts and CDs - By naming Union as the "payable-on-death beneficiary" of your financial instruments, you retain ownership of the assets and they remain available for your use. Upon your death, the assets pass directly to Union without going through probate.

Life Insurance - Rather than cancel policies you no longer need, you could name Union Adventist University as the beneficiary or transfer ownership to Union and potentially receive a charitable tax deduction.

WHY SHOULD I MAKE A PLANNED GIFT?

"It is an excellent way of making my contributions carry on even after I die." **Harry Haas '48**

"It is good stewardship to figure out the best way to make a gift and get actively involved with Union Adventist University." **John Wagner President of Union College '86-'91 and '12-'14**

"I have witnessed the commitment and enduring relationship to faith that Christian education promotes." **Virginia Myers, Honorary Alumna**

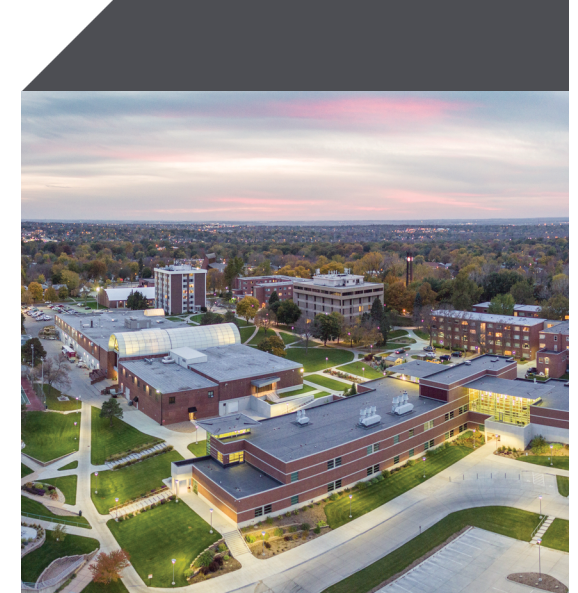
IT TAKES *ForeSight* TO INFLUENCE THE FUTURE

BEQUESTS

Bequest in a Will or Trust - This is a simple and common way to include Union in your estate plan. You can leave Union a percentage of your estate or make a bequest of a specific dollar amount or a piece of property.

Unrestricted Bequests - The official bequest language for an unrestricted gift to Union Adventist University is: "UNION ADVENTIST UNIVERSITY, 3800 South 48th Street, Lincoln, Nebraska, to be used for its unrestricted use and purpose."

Restricted Bequests - If you want to restrict a gift, please contact the Advancement Office so we can discuss how you want your gift restricted and how to word the bequest in your will or trust.



GIFTS THAT PROVIDE INCOME

Charitable Gift Annuities - Give a gift to Union and receive a fixed payment, which is partially tax free, for your lifetime. When you die, the remaining balance goes to Union.

Charitable Remainder Trust - Receive fixed or variable income for either your lifetime or a specified period of time. At the end of the trust's term, the balance goes to support Union's mission.

GIFTS OF REAL ESTATE

Retained Life Estate - You can transfer the deed of your personal residence or farm to Union Adventist University now and keep the right to live in and use the property for your lifetime.