

# Eastern Michigan University Heritage Society



Leaving a  
lasting legacy  
through a  
bequest or  
planned gift.



Membership is extended to alumni and friends who have made an estate provision for the EMU Foundation or a planned or deferred-gift commitment. Membership is also open to those who share with us in writing their intent to complete such a gift.

*You have the ability to support student scholarships, faculty research, as well as specific programs at Eastern Michigan University.*



**Members are provided a variety of benefits throughout the year:**

- Invitations to special receptions to celebrate your involvement as a member.
- Invitations to cultural campus events.
- Invitations to university sporting events.
- Special publications designed to keep members informed and involved.

## **Possible Tax Benefits**

Depending on the asset you use and when you use it, you receive an income tax deduction, capital gains benefits, and possibly lower your estate tax bill.

# Suggested Bequest Language

*By considering planned giving, you have the opportunity to contribute to the growth and development of EMU, ensuring that future generations of students have access to exceptional educational experiences.*

The EMU Foundation  
Tax ID is 38-2953297.

*This suggested language is intended to provide examples, not legal advice. The Eastern Michigan University Foundation recommends that you consult your attorney or financial advisor regarding your personal circumstances and estate planning wishes.*

## Bequest Language

"I give, devise and bequeath to Eastern Michigan University,

[select one of the following clauses, either (a) or (b)]

a. the sum of \$\_\_\_\_\_; or

b. a dollar amount equal to \_\_\_\_\_% of my adjusted federal gross estate to be used for the benefit of Eastern Michigan University following fund

\_\_\_\_\_."

## Qualifying gifts may include:

- A bequest intention.
- A completed bequest in will or living trust.
- The designation of EMU as the beneficiary of a retirement plan, annuity etc.
- A charitable gift annuity, deferred or immediate.
- A charitable remainder trust.
- A remainder-interest gift in a home, vacation home or farm.

# Thank You

***"As a scholarship recipient, an EMU cheerleader, a member of Mock Trial and Moot Court, a proud EMU graduate, and a future law student, I feel the everlasting effects of donor support."***

***Jordan Giles***



## Let Us Help You

If you have any questions about including Eastern Michigan University in your estate plans, please contact us. We would be happy to provide you with additional information.

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