



If you've ever returned to Williamstown on the second weekend in June, you know that the Williams 50th Reunion is a big deal. Ephs return in greater numbers and with greater enthusiasm than at any other time.

MAKE A BIG(GER) DIFFERENCE:

Start Planning at your 40th to Impact What's Important to You at Williams

EPHS STRENGTH IN NUMBERS AT reunions and their pride is matched only by their generosity. The 50th Reunion is an occasion when many alumni choose to support priorities at Williams that mean the most to them.

If you are about to celebrate (or have recently celebrated) your 40th Reunion, planning now can maximize the impact of your gifts to the college. **All gifts and pledges made between your 40th and 50th Reunions count towards the total class gift.** Savvy donors can be more generous than they might have thought possible by planning gifts carefully.

The Gift Planning Office can help you leverage your charitable giving, reduce your taxes, and increase or maintain your income level, while addressing your unique retirement, estate planning, and family situations.

① Start by considering a multi-year pledge paid in installments over time with cash, appreciated stock, or a variety of other assets.

② Supplement your retirement through life income gifts such as a charitable gift annuity (CGA) or a charitable remainder unitrust (CRUT).

A life income gift will pay beneficiaries age 60 or older for their lifetime and the remainder will fulfill a philanthropic goal of your choosing at Williams.

Bob Grace '69 is a master at thinking strategically about his giving and helping classmates do the same. Soon after his 40th Reunion he established a CRUT.

"I have always felt very privileged to have had a Williams education and that my daughters had the same opportunity. In retirement planning, my wife and I noted the shortfall in income given the absence of

pension. We decided to fund a CRUT to provide us with retirement income and to provide long-term funding for our family scholarship."

③ Participate in the Williams Today and Tomorrow Program, which combines an outright gift/pledge with an irrevocable pledge of a bequest in your will or trust.

④ Once you turn 70½ if you have a traditional IRA, you will be obliged to take a required minimum distribution (RMD) every year (generally taxable income to you). You can reduce the amount of federally taxable income in your RMD by making a Qualified Charitable Distribution from your RMD of up to \$100,000 each year to qualified charities such as Williams. IRA charitable rollovers provide an ideal way of making a sizable gift to Williams through annual distributions.

giftwise

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