

Focus on Philanthropy



Trinity College
HARTFORD CONNECTICUT

GIFT PLANNING NEWSLETTER

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Greetings from Gift Planning

Dear Friends,

Welcome to our inaugural gift planning newsletter, *Focus on Philanthropy*. In it, you will find useful information about tax-wise giving, as well as ways to create a meaningful legacy for you and your family. We will help you think about your personal philanthropy in light of your own circumstances and financial goals. We hope to inspire you to make the gift of a lifetime, one that reflects your values and leaves a lasting impact on Trinity students, faculty, programs, and facilities for years to come.

I also want to alert you that we have redesigned our gift planning website. Check it out at trincoll.edu/legacy.

We welcome your feedback on this newsletter; if there is a topic you would like to know more about, or if an article raises a question for you, please feel free to contact the Office of Gift Planning.

I also hope to see you on campus, at Reunion, or in my travels to your region. Until then, thank you for your investment in Trinity. Enjoy the newsletter.

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Donor Highlight: Bob Ebinger '67

Raised in Columbus, Ohio, Bob Ebinger always wanted to head east for college. Once on campus, he didn't waste any time getting involved in all aspects of Trinity life. He joined the Jesters and the Goodwin Fellows, was an organizer of the Film Society, and served on the Mather Hall Board of Governors, and as a Junior Advisor. In addition, he was a member of DKE, which, he says, "had a very inclusive membership: biker types, intellectuals, foreign dignitaries, persons of all faiths, as well as the only student of color at the time."



His classroom experience was equally eclectic. A history major, he fondly remembers courses taught by professors Downs (medieval), Davis (ancient), Steele (African) and Cooper (British) as well as his senior seminar in Soviet studies with Professor Netting. Outside of his major, he enjoyed an opera appreciation class with "the exuberant Dr. Barber." Of all of his professors, he was closest with Professor George Nichols in the Theater Department and Professor John Dando, who taught Shakespeare. "Both of these men helped me become the person I am today through their guidance, encouragement,

and friendship." These mentors, and his love of history "helped greatly in my professional documentary film travels to Africa, the Middle East, Asia, and Europe, and gave me an appreciation for cultures very dissimilar to our own." A true believer in the value of the liberal arts, Bob believes that this model of education "is essential to bringing people together to promote understanding, and to create a more peaceful world."

Trinity continues to provide the opportunity to explore new ideas, challenge old perceptions, and develop self-awareness and confidence."

For his 50th Reunion, Bob decided to include Trinity in his estate plans as a way to honor the memory of his two most beloved professors. Bob's bequest will establish The Professors John Dando and George Nichols Scholarship Fund, which will provide financial aid, with preference given to qualified students who have demonstrated an interest in theater arts, film or digital media production. "I always wanted to give something back to Trinity," says Bob. "I only wish I could have done this earlier, and shown professors Nichols and Dando how much they and their insight meant to me."

Why Make Charitable Bequests?

It's a common misconception that wills are only for the wealthy. A will eases the pain of your passing for those you leave behind. It designates who will take care of your young children. It expedites the settling of your assets. Without a will, regardless of your personal wishes, state laws will determine the transfer of your estate.

It also is an opportunity to make a statement about your values. Again, there is a misconception, perhaps even more common, that only the wealthy leave money to charity through their estate plans. In fact, people of a wide range of financial means make charitable bequests. The common thread is not their wealth level, but rather their desire to have a lasting, positive impact on the world.

A Gift By Will Is Easy To Make

A bequest is one of the easiest charitable gifts to make. It is simple to implement, and easy to change should you ever need to. You can give specific property, designate a dollar amount, or allocate a percentage of your estate. You can also name Trinity as a beneficiary of your retirement plan or life insurance policy.

A Gift By Will Does Not Alter Your Current Lifestyle

Making a bequest is a way of demonstrating your commitment to Trinity's future without affecting your current asset balance or cash flow. When creating or revising your estate plans there are no additional costs for including charitable beneficiaries, and you can easily modify your bequest to address any changes that arise in life.

A Gift By Will Can Change Lives

Trinity College prepares students to be bold, independent thinkers. After graduating, our students go on to lead transformative lives and engage with the world. By remembering Trinity in your estate plans, you help to ensure that Trinity can continue to provide exceptional students with an equally exceptional liberal arts education for generations to come.

A Gift By Will Creates A Lasting Legacy

Including Trinity in your will demonstrates your commitment to the future of the College. A bequest allows you to make a gift of a lifetime, one you never thought possible, and it ensures that your values will live on.

You don't have to be wealthy to make a difference. Whoever you are, whatever your situation, you can have a positive impact by including Trinity College in your will.

Beat the Clock at Year-End

As you think about your year-end charitable giving, consider a gift to Trinity College. There are many ways to make your gift, but time is of the essence if you want to receive tax benefits for 2017. The gift date for tax purposes depends on the type of gift and how you are making the gift. It's natural to procrastinate, but don't get caught short at the end of the year.

- Cash or check – the gift date is the date it is mailed (the “mail box rule”)
- Credit card payments – the day the charge is posted to your account (this may be a few days after you put the charge through on your end)
- Securities – the gift date for electronic transfers is when they are deposited into Trinity's account, not when you request that your broker initiate the transfer
- Gold and silver – if you have physical coins or bullion, the gift date is the day of delivery