



Dear John,

I hope this e-newsletter finds you doing well. It is already a hot and busy summer here in Jacksonville. The second wave of incoming students and their parents arrived last week for new student orientation. We are truly excited to welcome the class of 2019!

As Jacksonville University's new Director of Planned Giving, I wanted to share a few thoughts with you. Perhaps you may want to support the University but may wonder how giving may affect your cash flow or your family's financial security.

There is good news!

You can support Jacksonville University without impacting yourself or your family. Have you ever thought to yourself, *I'd like to give more to charity* or *I'd like to make an impact in my community*, but you don't know how? You may be surprised to learn that you can take steps to give and make an investment in our students today without giving away the assets you might need now or later in life. Including charitable giving as part of your estate plan will help you do just that!

- **You can make the following bequests of:**

1. A fixed amount, such as \$10,000
2. A specific asset, such as a car
3. A percentage, such as 15% of your assets
4. What is left of your estate after specific bequests have been made
5. Proceeds from the sale of real estate

- **Bequests**

Naming us as a beneficiary in your will or trust is one of the easiest ways to help the University. This gift will have no impact on your current lifestyle, and you can make a big difference in our future work. A bequest offers you flexibility. For example, you can make a gift to us only if you outlive your spouse or others you wish to support, and your gift may be changed at any time.

- **Beneficiary Designations**

There are some assets that are easier to give to charity, and these gifts don't require a visit to your attorney to draft a will or codicil. For example, you can name us as a beneficiary of your retirement plan, investment account or life insurance policy. Many plan administrators and financial services companies include forms online, which makes it easy for you to complete a change of beneficiary.

There are many easy, affordable ways to give back and make a difference.

Another way to give back to JU is to create a named scholarship through our ASPIRE campaign. Gifts toward scholarships are more powerful than ever through ASPIRE because your gift is matched equally by Jacksonville University. Unrestricted named scholarships open the door for students to achieve their dreams of pursuing an education and success at Jacksonville University that otherwise might not have been. Your impact would be immediate! Creating a named scholarship is a great way to honor yourself or a loved one. To learn more, please visit: www.ju.edu

In addition, I am pleased to share with you the latest news from the top sources including Washington, the Savvy Living column, and other gift finance news and timely articles. We provide this e-newsletter and web site to our friends as a thank you for your involvement and interest in the University.



PERSONAL PLANNER

Integrity and Initiative

Pat and Allen were talking about their three children. They are empty nesters and the three children are off making their way in the world. [Read More](#)

SAVVY LIVING

How to Choose the Best Place to Retire

My wife and I will both be retiring in a year or two and are interested in moving to a smaller house in a better climate but could use some help. What resources can you recommend for locating and researching good places to retire in the U.S.? [Read More](#)

YOUR PLAN

Fixed Income for Retirement

After working for decades as a pediatrician in a small rural town, Patricia was ready to retire. [Read More](#)

WASHINGTON NEWS

Highway Bill Inches Forward

On a July 15 vote of 312-119, the House passed the Highway and Transportation Funding Act of 2015, Part II (H.R. 3038). The five month plan to support the Highway Fund until December 2015 would be the thirty-fourth extension. [Read More](#)

FINANCES

Stocks - Google's Earnings Impress [Read More](#)

Bonds - Treasuries Rise on Looming Rate Increase [Read More](#)

CDs and Mortgages - Interest Rates Reach 2015 Highs [Read More](#)

Many of you have notified us of your planned gift, and we thank you! For those of you who have not, please let us know so you can be recognized too in our exclusive Heritage Society. In addition, if you would like further information on how to make a planned gift to JU, please contact me at: mpelleg@ju.edu, or (904) 256-7928. You may also visit us online [here](#).

Best Regards,

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