



Thornton Academy's 1811 Society

A Shared Past. A Secure Future.

For more than 200 years, Thornton Academy has prepared students for success in a changing world. Our alumni leverage what they learn at TA to make an impact on those around them through their careers, family and community involvement, and by supporting causes that are important to them.

We are grateful for the alumni, family, and friends of varying ages and backgrounds who have already remembered TA in their estate planning. Their gifts may differ in size and nature, but they share a common commitment to ensuring that future Trojans benefit from the same tradition of educational excellence enjoyed by generations.

We encourage you to consider Thornton Academy's 1811 Society, joining those who have already chosen to step into this legacy of leadership and generosity by including TA in their estate plans. There are many ways to participate in planned giving, each offering an opportunity to support the future of the school, while also securing your own financial future.

PLANNED GIFT OPTIONS AT A GLANCE

BEQUESTS

A gift that costs you nothing during your lifetime.

RETIREMENT ACCOUNT

Give from your traditional IRA and avoid federal income tax.

INSURANCE

Practical and simple: Give from an existing or new policy.

CHARITABLE REMAINDER TRUST

Sell appreciated stock and reinvest proceeds without capital gains tax.

CHARITABLE LEAD TRUST

Benefit TA while increasing your family's inheritance by reducing estate taxes.



See reverse side for a brief overview.

PLANNED GIVING OVERVIEW:

There are many ways to give to TA in a manner that matches your financial and philanthropic goals. With intentional gift planning, your generosity will benefit future Trojans, as well as you and your loved ones.

YOUR GIFT	YOUR GOAL	YOUR BENEFITS	HOW TO START
BEQUESTS IN WILL	<ul style="list-style-type: none">• Maintain control of your assets during life.• Defer a gift to TA until after your lifetime.	<ul style="list-style-type: none">• Give while first providing for your family.• Make a donation that is exempt from federal estate tax.• Maintain life use and ownership of your property.	Name Thornton Academy in your will (designate a specific amount, a percent, or share). Even if you have an existing will, you can contact your attorney at any time to add an ammendment.
RETIREMENT ACCOUNT	<ul style="list-style-type: none">• Maintain control of your assets during life.• Avoid the two-fold taxation on IRAs, 401(k)s, 403(b)s or other employee benefit plans.	<ul style="list-style-type: none">• Provide lifetime income.• Receive income and estate tax charitable deductions.	Name Thornton Academy as a beneficiary in your IRA, 401(k), 403(b), or pension of the remainder of your assets after life. Contact the administrator of your retirement plan to get started.
INSURANCE	<ul style="list-style-type: none">• Allow TA to use your gift either now or later.• Give from a life insurance policy that is no longer needed.• Receive a charitable income-tax deduction.	<ul style="list-style-type: none">• Receive income-tax deductions for contributions to TA to cover any remaining unpaid premiums.• Make a gift through your installment plan.	Complete a beneficiary designation form with your insurance provider. To explore this way of giving, contact a life insurance agent who is well versed in using insurance for charitable giving.
CHARITABLE REMAINDER TRUST (CRT)	<ul style="list-style-type: none">• Transfer your appreciated property without paying capital gains tax.• Enjoy regular income for life or a term of years.• Make a long-term gift to TA.	<ul style="list-style-type: none">• Receive tax deductions.• Enjoy income for life or a term of years (time set by you).• See possible income growth over time.• Avoid capital gains tax.	Transfer your cash or appreciated property to fund a charitable trust. The trust sells your property tax-free and provides you with income for life or terms of years.
CHARITABLE LEAD TRUST (CLT)	<ul style="list-style-type: none">• Give cash or property to your family in the future.• Avoid substantial gift or estate tax.• Make a long-term gift to TA.	<ul style="list-style-type: none">• Receive gift or estate tax deduction.• Give to TA while increasing your family's inheritance by reducing estate taxes.	Transfer your cash or property to fund a lead trust that makes a gift to TA for a number of years. You receive a charitable deduction, and your family receives the remainder at substantial tax savings.

A Tradition Strengthened Over Time

We understand that there are important decisions to be made when considering a planned gift. We're ready to work with you and your financial advisors to create a plan that best meets your personal goals and wishes. The advantages of planned gifts benefit both Thornton Academy and donors. No matter the amount, your gift will make a meaningful impact that carries your legacy well into the future.

TO FURTHER CONSIDER A LEGACY GIFT, OR TO LET US KNOW THAT YOU HAVE ALREADY INCLUDED THORNTON ACADEMY IN YOUR PLANS, PLEASE CONTACT THE DEVELOPMENT OFFICE AT DEVELOPMENT@THORNTONACADEMY.ORG OR 207-602-4460. THANK YOU.