



MAKING YOUR BEST REUNION GIFT

Milestone reunions are when many alumni think about a special gift to recognize their time at Mercersburg. Most of these are class gifts to the Annual Fund. Special philanthropic opportunities like gifts to the endowment, gifts to establish an endowed fund, deferred gifts through an estate provision, or life-income gifts provide individuals with a permanent legacy at Mercersburg. All gifts further your class giving goals. What's most important is that you participate with a gift that is comfortable for you. We can discuss options for you to consider, or you can reach out to your reunion committee members, who can be found at mercersburg.edu/reunionweekend.

Competitive? That's like asking which is better, Irving or Marshall! So, here's what you need to know about reunion giving:

Every class has a **dollar goal** and a **participation goal**. These are based on gifts to the Annual Fund during the year of your reunion, between July 1 and June 30. You can make an extraordinary impact for your class and for our students, faculty, and staff just by making your best possible gift to the Annual Fund!

Classes also recognize **overall giving**. This includes gifts to the endowment, documented estate provisions, life-income gifts, recurring gifts, and multi-year commitments made in the year of the reunion and over the four years after the reunion.

REUNION RECORDS

Reunion Year	Attendance Record	Class	Annual Fund Record	Class	Donor Record	Class
50th	52	1948	\$228,728	1957	64	1964
45th	45	1949	\$113,962	1974	55	1972
40th	33	1979	\$190,095	1982	49	1979
35th	33	1954	\$222,872	1982	51	1965
30th	37	1962	\$126,214	1976	58	1972
25th	37	1963	\$112,896	1979	59	1979
20th	51	1999	\$101,450	1989	58	1999
15th	23	2003	\$58,393	1997	62	1999
10th	43	2007 & 2008	\$109,997	2011	65	2007
5th	51	2018	\$16,267	2013	66	2013



Ways to Give

MULTI-YEAR COMMITMENTS

These are generally a five-year pledge made in the reunion year and for each of the four years after reunion. This helps with your class participation, the class reunion gift, and overall giving. Plus, it allows Mercersburg to count on your support as it delivers programs to students in the years ahead.

SECURITIES (STOCKS, BONDS, AND MUTUAL FUNDS)

With a gift of appreciated securities, you can take a charitable deduction for an amount equal to the value of the security on the day the school receives it, and avoid capital gains tax that you would have paid had you sold it. The tax savings can be much more significant than with a gift of cash.

How it works: Joe's 50th reunion is in June, and he wants to make a special gift to honor that milestone as well as the special connections he's reestablished with his classmates. In 1980, he bought shares of IBM for about \$16 per share. It now trades for \$135 per share. He decides to gift \$10,000 shares of IBM to the Annual Fund. This is a larger gift than he ever imagined—and for shares that originally cost him less than \$1,200. Additionally, he pays no capital gains tax because the shares are gifted to Mercersburg, and he receives a tax deduction for the full \$10,000.

GIFTS THROUGH DONOR-ADVISED FUNDS

This can streamline household giving. Ask your fund manager to transfer funds to Mercersburg (TIN#: 23-1365963).

IRA CHARITABLE ROLLOVER

U.S. taxpayers who are at least 70 1/2 years of age may make gifts to Mercersburg from an IRA without having to count those funds as adjusted gross income. Consequently, you do not have to pay taxes on the gifted amount. This is particularly helpful if you do not itemize your deductions. Additionally, since the gift doesn't count as income, it can reduce your annual income level. This may help lower your Medicare premiums and decrease the amount of Social Security that is subject to tax.

Distributions count toward your required minimum distribution (RMD) if you are age 73. Your IRA administrator must distribute your gift directly to Mercersburg, and the individual maximum is \$100,000 per calendar year. These are all great reasons to consider using your IRA (instead of cash) to make a charitable gift.

For more information about this opportunity, contact Carolyn Griffin Yeager P '20, '21 at 717-328-6219 or yeagerc@mercersburg.edu.

MARSHALL AND IRVING ALLIANCE

Become a member by including Mercersburg in your estate plan. Documented provisions count toward the class gift. Estate provisions can take a variety of useful formats, from a typical bequest outlined in your will to a beneficiary designation of your investment or retirement account or your insurance policy. Another option is a gift that can provide you with lifetime income (charitable gift annuity or trust). This is an effective way to make an impact during your reunion. Find out more at mercersburg.edu/planned-giving.