



# The *Legacy* of Psi Upsilon

## A Legacy of Love and Loyalty

After almost three decades of service to Psi Upsilon, Mark A. Williams, Phi '76 (University of Michigan) will retire at the end of 2017.

His love and devotion to Psi Upsilon are evident in a decision he made that will leave an indelible imprint on the Fraternity's future. Mark has directed a future gift to Psi Upsilon through his will.

"When I arrived at Michigan, I wasn't looking to join any fraternity," he recalls. "But I was looking for a place to fit in. At a large school, that can be very difficult to find." He found that place at the Phi chapter.

Mark's undergraduate years were interrupted when he was drafted after his freshman year. Following a two-year absence from Michigan, he didn't know whether or not he would still have a place in the chapter.

"Those who recruited me were gone. I didn't know the new guys, and they didn't know me."

Mark recalls, "It was a different era. No one went out of his way to thank you for your service. In fact, it was just the opposite, yet Psi Upsilon welcomed me back."

Fast forward to 1990 when Mark and his wife, Mariann, began their careers with Psi Upsilon. Mariann, who filled numerous roles and made hundreds of friends over the years, left the Foundation staff in December 2016. "We've been heartened to learn how important Psi U is to so many brothers and their families, and how those formative experiences led many of them to make annual gifts, support the Leadership Initiative, and ultimately, include Psi Upsilon in their estate plans."

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Mark Williams addressing the Archons Academy.



Mariann and Mark Williams with past Executive Council president Mark Bauer.



## A Legacy of Love and Loyalty

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Mark says his reason for giving goes right to the heart of the Psi U mission and values. “Psi Upsilon’s mission is focused outwardly, for the benefit of others. We are ‘united in friendship for the promotion of the highest moral, intellectual, and social excellence.’ It’s about what you do for others with the talents you have, the way you conduct yourself in society and how you choose to serve your community and your country.”

This end requires sacrifice and self-giving, and Mark points to Psi U members he met whose lives epitomize that as a model for himself.

“From my role here, I see firsthand the results of gifts from wills and bequests. I see the link between my formative years on campus, and the present opportunity and duty to help

form a new generation, to help them devote themselves to these values.

“Young adults will always need strong moral guidance and values on which to structure their lives. We know Psi Upsilon is poised to offer that possibility through its leadership education and mentoring; and that it’s our gifts that will help turn that potential into reality.”

“PSI UPSILON’S MISSION IS FOCUSED OUTWARDLY, FOR THE BENEFIT OF OTHERS.”

—Mark Williams

Learn more about Mark and his career at [www.psiu.org/contact](http://www.psiu.org/contact).

### Schoepflin Society

The Schoepflin Society is a recognition club for those who have named Psi Upsilon as a beneficiary in their will, estate plan or other planned gift. The Society is named for Paul H. Schoepflin, Pi (Syracuse) 1912, whose bequest made him one Psi Upsilon’s largest benefactors. Recognition of his gift and of yours will encourage others to follow your lead.



# Make the Impossible Possible in One Sentence

## Remember Psi Upsilon in Your Will or Living Trust

What if all you had to do to ensure that Psi Upsilon can support our members for years to come is to write a simple sentence? Sound impossible?

Securing the future of Psi U really is as simple as one sentence. By including a gift to The Psi Upsilon Foundation in your will, you can support our values of moral, intellectual and social excellence in our members tomorrow without giving away any of your assets today.

Including Psi Upsilon in your will is a popular gift to give because it is:

- 1. Affordable.** The actual giving of your gift occurs after your lifetime, so your current income is not affected.
- 2. Flexible.** Until your will goes into effect, you are free to alter your plans or change your mind.
- 3. Versatile.** You can give a specific item, a set amount of money or a percentage of your estate. You can also make your gift contingent upon certain events.

### Use This Sentence

If you are ready to include a gift to The Psi Upsilon Foundation in your will, ask your attorney to add this suggested wording to your will:

*I give to The Psi Upsilon Foundation, Indianapolis, Indiana, (the sum of \$\_\_\_\_\_ or \_\_\_\_\_ percent of the rest, residue and remainder of my estate) for its general purposes.*



Learn how you can make an impact on Psi Upsilon's future with a gift. Contact Mark Williams at (317) 571-1833, Ext. 101, or [maw@psiu.org](mailto:maw@psiu.org) today.



# How to Leave a Legacy in 5 Minutes

In less time than it takes to brew a pot of coffee, you can make a lasting impact at Psi Upsilon.

## Here's How:

One of the easiest gifts you can make is to name The Psi Upsilon Foundation as a beneficiary of one of your assets, such as your retirement plan or life insurance policy. This is a popular gift to give because you can set it up by yourself. There's no need to use the services of an attorney or financial advisor to put your gift in place.

## KEY BENEFIT

Beneficiary designations offer built-in peace of mind. Your current budget isn't affected because you make the gift after your lifetime, and you can change your mind at any time.

## Simple Steps to Follow:

- 1 Contact the administrator of your retirement plan, insurance policy or bank account for a change-of-beneficiary form or simply download a form from your provider's website.
- 2 Decide what percentage of the account you wish to give to Psi Upsilon and name Psi U, along with the stated percentage, on the form.
- 3 Sign and return the form to your plan administrator or insurance company.
- 4 Tell us about your gift! It would be our honor to thank you for your support. Plus, your generosity can inspire others to follow your example.



## YOUR SUPPORT MATTERS

No matter the size, your gift makes a meaningful difference at Psi U and to Psi Upsilon's future. Contact Psi U to learn more about giving a gift that doesn't cost you anything today.



For more information, call or write:

**Mark A. Williams**, Phi '76 ♦ President and CEO

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