



# PSI UPSILON Foundation

## Including Psi Upsilon In Your Estate Plan

Bequests and other testamentary gifts by generous brothers have been a significant source of financial support for the Foundation over several generations. The continuation and expansion of this tradition of remembrance will continue to Psi Upsilon's future financial strength and continued excellence.

A gift to the Foundation through your estate plan qualifies you to join the **Schoepflin Society** and will be recognized in unique ways to thank you for your foresight in building the future of our organization. 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. This is a marvelous opportunity to truly make a difference in the lives of future generations of Psi Upsilon brothers.

You can make a specific gift to the Foundation of cash, securities, real estate or other property through your will, codical or trust instrument. You can also designate Yale as the beneficiary of all or part of the remainder of your estate or trust after the payment of estate-related expenses, other bequests, or following the death of a spouse or primary beneficiaries. Another way to include Yale in your estate plan is to name the Foundation a beneficiary of your retirement plan or life insurance policy.

A bequest or trust provision for the benefit of the Foundation – a non-profit 501(c)3 organization, may qualify your estate for an estate tax charitable deduction.

### SAMPLE TESTAMENTARY LANGUAGE

*"I, [name], of [city, state, zip], give, devise and bequeath [percentage of estate remainder, written amount or description of property] to the Psi Upsilon Foundation, a Rhode Island not-for-profit corporation with offices in Indianapolis, Indiana. This gift is made to help further the objectives and purposes of the Psi Upsilon Foundation."*

While unrestricted gifts allow the Foundation to allocate funds to areas of greatest need, you may designate your bequest for a particular purpose or use by a specific program, scholarship or activity of the Foundation. In order to ensure that the evolving needs of the Foundation are met, it is advisable to use the following language with restricted gifts:

*In the event that at some future time due to changed circumstances, in the judgement of the Foundation Board of Directors, it becomes impractical to apply my bequest to the designated purpose(s), the Board of Directors of the Psi Upsilon Foundation shall make such modifications as will appropriately recognize my interests in coordination with Foundation policies.*

To join the Schoepflin Society, please provide documentation of the provision within your estate plan using the Foundation's form. The Foundation can assist you should you have questions or concerns relating to your estate plans. Please contact the Foundation office for further information:

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