



YOUR U-M LEGACY

SPRING 2019

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Gary and Chris Johnson Seek to Bring Fun, Games to Mott Patients

Chris and Gary Johnson's connection to U-M began with a passion for athletics and grew to include a commitment to helping the patients and families at C.S. Mott Children's Hospital.

Through an estate gift, the Johnsons are supporting unique ways of transforming the hospital environment. Their contribution benefits Mott's Patient Technology Program, which provides gaming and digital technology experiences for patients and families.

Xbox 360 systems, virtual reality programs and augmented reality options bring our patients' rooms to life. They offer patients a distraction while undergoing procedures, encourage them to move around and exercise, and give them a chance to socialize with friends and family.

The Johnsons shared their inspiration for supporting the Patient Technology Program:

"While in our mid-20s and living in Southern California, we had the privilege of attending our first two University of Michigan football games, which were back-to-back

Rose Bowl games. That experience ignited our love for Michigan sports.

"We attended a fundraiser for C.S. Mott Children's Hospital and were so inspired by former U-M athletes who support Mott that we decided to include the hospital in our trust. For us, making a difference in the lives of children is extremely meaningful and we could not think of any other place to do it than at Michigan."

The Johnsons' estate gift will also support the U-M football team, the Michigan Marching Band and the School of Music, Theatre & Dance.

See how you, like the Johnsons, can make a lasting impact at U-M. Contact the Office of Planned Giving at (734) 615-2022, toll free (866) 233-6661 or visit plannedgiving.umich.edu to learn more.



CREATE A LASTING LEGACY AT U-M

Make a big difference at the University of Michigan with just a little effort. Learn how in our new guide *The 4 Easiest Ways to Leave Your Legacy*. Request your copy today using the enclosed reply envelope.



Make Room for Wolverines

It's not unusual to focus on family and loved ones when creating your will. Ensuring our loved ones are cared for after we're gone is one of the top reasons we craft this important legal document.

But what about the places that matter to you? Those that help shape the futures of young people and the world—institutions like the University of Michigan? Discover an easy way you can support U-M while still putting your family first.

PERCENTAGE GIVING

Instead of a fixed amount, consider gifting U-M a percentage of your estate or specific assets. Your gifts to U-M and to loved ones remain proportional, regardless of how your estate fluctuates.

Here are three ways to put family first and support future Wolverines:

1. Gift a percentage of your estate to us in your will.
2. Leave the University of Michigan a percentage of your residual estate (the portion of your estate that remains after all gifts have been made and all claims of the estate are satisfied).
3. Name the University as a beneficiary of a percentage of your life insurance policy, retirement account or brokerage account.

HONOR SOMEONE WITH YOUR GIFT

Is there someone special in your life who shares your connection to the University of Michigan, such as a professor, former classmate or family member? Contact the Office of Planned Giving at (734) 615-2022 or toll free (866) 233-6661 to get more information on how you can honor that relationship with a gift to U-M in their name. Or go online at plannedgiving.umich.edu to get help planning your perfect gift.



DON'T YET HAVE A WILL?

Seek the assistance of an estate planning attorney. To find a qualified professional, ask family and friends, or consult your local bar association.



Avoid Taxes and Leave a Greater Legacy at U-M

Wouldn't it be nice if you could avoid some of life's annoying fees: at the bank, on your cell phone bill, or when you stay at a hotel? And of course, there's one of the biggest fees of all: capital gains tax.

When you leave a legacy for the institutions that mean the most to you, such as the University of Michigan, you want to make as big an impact as possible—on students and on U-M. That's hard to do if the government takes a portion of your gift first.

If you are thinking about using stock to make an impact at U-M, donating the stock is a better option than selling. When you give us appreciated securities that you've owned for more than one year, you may receive two tax benefits:

1. You are exempt from paying capital gains taxes on any increase in value—taxes you would pay if you sold the stock.
2. You are entitled to a federal income tax charitable deduction based on the current fair market value of the securities, regardless of their lower original cost, if you itemize.

WE'RE HERE TO HELP

Not sure whether donating stock is the best way for you to support U-M? **Feel free to contact the Office of Planned Giving at (734) 615-2022 or toll free (866) 233-6661.**

Together with your advisor, we can help you fulfill your charitable goals and protect your assets from unnecessary taxes.

THE JOHN MONTEITH LEGACY SOCIETY

Just as the University of Michigan founders had a vision that would create an educational system of the future, so do the members of the John Monteith Legacy Society.

Recognition in the John Monteith Legacy Society is automatic upon receipt of notice that the University of Michigan is named as a charitable beneficiary in your estate plan.

MEMBERS OF THE JOHN MONTEITH LEGACY SOCIETY RECEIVE:

- + A subscription to *Leaders & Best*, the Office of University Development's donor publication
- + An engraved memento
- + Invitations to periodic donor appreciation events

CONTACT THE OFFICE OF

PLANNED GIVING to learn more about becoming the newest member of the John Monteith Legacy Society.

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