



## BUILDING OUR FUTURE TOGETHER

A guide to Planned Giving & Legacies

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For 55 years, The American University of Paris has held a unique position in the world of global higher education. Since our founder Dr. Lloyd Delamater, surveying the wreckage of post-war Europe, offered a vision of education inspiring young people “to bridge the gap of narrow nationalism,” we’ve grown from a founding class of 103 students to a community of 1,200 students from 110 nationalities, speaking 69 languages and dialects on campus. Under the leadership of AUP President Celeste Schenck, and with the support of our faculty, alumni, parents and friends, we’ve come a long way, and we are proud to be today one of the most international universities on the planet and one of the most academically prestigious American-style universities across Europe, Central Asia, the Middle East and North Africa.

AUP will always remain true to its original and powerful purpose: **to reinvent American liberal arts education for an ever-more-international world.** AUP’s comparative and cross-cultural curriculum asks students—*global explorers* as we call them—to reflect upon what it means to be human, to live in a world of interdependence, and

to act ethically and lead decisively. The loyal support of alumni, parents, students, and faculty has been critical in advancing our mission-critical work of producing graduates who belong to the world, and whose leadership across it is profound and lasting. To uphold this mission long into the future, we invite you today to make a sustainable gift to The American University of Paris. A planned gift will have an enduring impact on our campus and our community.

### Leave your Legacy today

Any gift given today has an immediate impact on AUP students and faculty. By including AUP in your will, you guarantee an impact on the AUP community of the future. For a truly lasting legacy, you may consider endowing your gift, ensuring its impact is felt every year for many generations to come. In sincere gratitude for your support, it would be our honor to invite you to join our 1962 Society – AUP’s family of alumni, parents, trustees, faculty and friends who entrusted the university with a planned gift.

## Making a Planned Gift

Here are a few different ways you might join our 1962 Society, planning your legacy accordingly:

### ❖ Bequests

A bequest is a gift you make in your will. This could be a specific sum, a percentage of your estate, or a residual figure (i.e. what remains after all taxes and expenses have been paid). Most people don't know the exact size of their estate, so making a percentage gift would ensure your family remains your priority, while at the same time benefiting The American University of Paris.

Bequests allow you to fulfill your philanthropic goals, while also ensuring your and your loved one's lifetime needs are met. They are simple to set up and require specific wording with which we can provide you. You would need to consult your own attorney, as well, who will ensure your wishes are clear in your will.

### ❖ Retirement Funds & Individual Retirement Assets (IRAs):

These are often the most heavily taxed assets in an inherited estate. *AUP, as a non-profit organization, is exempt from these taxes.* If you are considering making a gift to AUP at the end of your life, you may prefer to leave your loved ones your untaxed assets, and AUP the assets your family would otherwise be taxed on.

Additionally, if you own an IRA and have reached the age of 70 1/2, you can make a donation from your IRA of up to \$100,000 during your lifetime. Ordinarily, any withdrawals during your lifetime would be subject to income tax. But, in this special circumstance, your gift would be completely free from income tax.

### ❖ Commercial annuities:

As with retirement funds and IRAs, these are heavily taxed when passed on to your loved ones. The amount taxable increases if there has been a great appreciation in value since purchase. Again, you may prefer to leave your loved ones your untaxed assets, and AUP the taxable ones, from which the University remains exempt.

### ❖ Life Insurance Policies:

When our children are younger, life insurance policies help us protect their futures, in case anything happens to us. But perhaps your circumstances have changed, and your children have grown up? If so, you might consider naming AUP as the beneficiary of your existing life insurance policies, donating either today or tomorrow.

## The Impact of your Gift

We would be honored to welcome you to the 1962 Society. If you are interested in joining by planning a gift to AUP, we recommend you consult your attorney, and we strongly encourage you to talk to your loved ones about your intentions.

For AUP, particularly when planning for the future, unrestricted gifts give us the agility to direct funds where the need is greatest at that moment in time. Should you have specific requests about how we use your gift, please get in touch, as we want to be sure we can fulfill your wishes.



Here are a few examples of how your support could enrich the lives of AUP's diverse global community:

- **Our Campus:** The past few years have seen dramatic improvements to our student-centered, 21<sup>st</sup>-century campus. In the coming months, more than half our campus will be housed in one core set of buildings – a landmark achievement in our 55-year history. Looking to the future, we need to sustain our new environment, developing and improving where necessary, always ensuring we continue to provide learning spaces appropriate to both our innovative curriculum and to our demographic diversity.
- **Our Centers:** In 2016-17, we are inaugurating the last of five new centers for pioneering, faculty-mentored research that have been designed to break down boundaries between disciplines and cultures. These centers will deliberately link teaching and research in a hands-on learning environment, enabling student-faculty collaboration on the biggest challenges of the 21<sup>st</sup>-century - Human Rights, Democracy, the Environment, Diplomacy and Cultural Translation – and fostering a greater sense of global engagement in our students, the university community, and the world that surrounds us.
- **Our Community:** An institution's wealth is its people. We cherish differences amongst us – our languages, worldviews, disciplines and talents – and we are dedicated to ensuring the diversity of our student body and the excellence of the international academic community at The American University of Paris.
  - *Our Students:* Although we offer institutional financial aid to 51% of our students, some need additional support to live in Paris during their studies. The cost of living in Paris, travel, and regular participation in study trips are high. Our goal is to bridge the gap between student need and institutional capacity through steady, reliable, community-building giving to AUP's scholarship funds.
  - *Our Faculty:* To recognize the importance of recruiting, rewarding and retaining a world-class faculty, we will be awarding exceptionally talented staff as Professors of Promise, who will receive additional funding for research and pedagogical innovation as well as a special title.

## Recognition

It will be an honor to properly acknowledge your support as a member of the 1962 Society. You will receive regular updates on our work and progress, invitations to exclusive events, and opportunities to network with AUP's closest alumni and friends. For our most committed supporters, we can offer a range of unique naming opportunities. Whether this is to pay tribute to a loved one or special faculty member, preserve a family name, or highlight a company presence, named recognition is a wonderful way to connect the past, present and future.

## Contact Us:

We would love to hear from you have if you already made provisions to support AUP. We would also be delighted to help answer any questions you might have about planning a gift. To talk more, please contact Tori Griffiths from our Outreach and Advancement team at [vgriffiths@aup.edu](mailto:vgriffiths@aup.edu) or at +33 (0)1 40 62 07 04.



## Planned Giving - Statement of Intent

Your bequest or estate gift is gift to the future generations of AUP students, promising the same access to the transformative educational experience that The American University of Paris provides today.

If you have, or intend to provide a gift to The American University of Paris in your estate plan, please complete this confidential form. Should you choose to disclose the specifics of your gift, please include the document or pertinent language from your document. This statement is nonbinding and revocable.

- ☐ I/We have already included The American University of Paris in my/our will(s).
- ☐ I/We intend to include The American University of Paris in my/our will(s).
- ☐ I/We have already made a gift of life insurance to The American University of Paris.
- ☐ I/We intend to make a gift of life insurance to The American University of Paris
- ☐ Other type of gift in your estate plan to The American University of Paris \_\_\_\_\_

With your permission, we would like to include your name in our acknowledgements of those who have included the University in their estate plans. By letting others know of your generosity and dedication to AUP, they may be encouraged to take similar action.

- ☐ I/We would like to be listed as follows: \_\_\_\_\_
- ☐ I/We would prefer to remain anonymous.

Name: \_\_\_\_\_ Name partner/spouse \_\_\_\_\_  
(Please print your name(s) as it should appear on our gift acknowledgement)

Address: \_\_\_\_\_  
(Mailing Address)

City, State \_\_\_\_\_ Zip or Postal Code \_\_\_\_\_ Country \_\_\_\_\_

Telephone \_\_\_\_\_ Email address \_\_\_\_\_

Attorney's name and contact information \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*établissement privé d'enseignement supérieur libre*

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Association régie par la loi du 1<sup>er</sup> juillet 1901 – SIRET 784 308 272 00037 – Code APE 8542 Z



## Planned Giving - Bequest Wording

Once you have decided on the type of bequest you would like to make to The American University of Paris, please consult your attorney to make sure your wishes are reflected in your will. We recommend the following language:

- ☐ **Specific bequest:** *"I give the sum of \$ [\$ /amount] of my estate to **The American University of Paris** to be used for its general purposes.*
- ☐ **Percentage bequest:** *"I give [insert percentage] % of my estate to **The American University of Paris** to be used for its general purposes.*
- ☐ **Residuary bequest:** *"I give my residuary estate to **The American University of Paris** to be used for its general purposes.*

Please note that a bequest to our general purposes allows us the greatest flexibility to respond to the strategic priorities of our community in the future. If you wish to designate the use of your bequest, we will honor your wish. Bequest provisions designated for a specific program, activity or chapter require additional language. It is best to contact us in advance for assistance to ensure that your wishes are properly understood. For more information, please contact Tori Griffiths at [vgriffiths@aup.edu](mailto:vgriffiths@aup.edu) or on +33 (0)1 40 62 07 04.

We would love to hear from you if you decide to leave us a gift in your will, as we would be honored to welcome you as a member of the 1962 Society – our closest circle of friends and family. Thank you so much for considering such a meaningful gift to The American University of Paris.