

Leave a legacy

A planned gift to Scholarship America helps students now, and into the future.

Why Scholarship America?

65% of all college students use scholarships to help them afford college—and those scholarships cover around 1/3 of the total cost. At Scholarship America, we help more than 100,000 students pay for college every year—and we can't do it without you.

We believe in a nation where every student can pursue their educational goals, regardless of where they started. Supporting Scholarship America means helping students break down barriers, achieve their college aspirations and embrace the American Dream.

Your support of our mission makes it possible.

“I believe investing in education has the most clear payoff on investment one can make. It’s a way to serve others literally forever.”

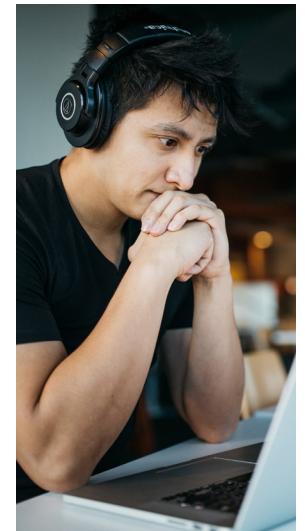
— William K. Reilly,
former Environmental Protection Agency Administrator and
Scholarship America supporter

Planned Giving 101

Whether it's a bequest in your will, a gift of stock, an insurance or asset transfer or something else, a planned gift can create a lasting legacy for you, your family and the students you help.

When you leave a legacy gift, you're extending your passion for education to future generations. Your contribution helps guarantee the long-term success of Scholarship America's mission—and ensures that our students have a helping hand to reach for when their education is at risk.

What's more, you can work with Scholarship America to structure a gift that works for you, whether that means realizing immediate impacts or helping your family with deferred tax benefits.



Five Ways To Make a Planned Gift

A planned gift to Scholarship America comes with built-in flexibility and customization. We will work with you to ensure your legacy is impactful to students for years to come.

Different ways to structure your planned gift include:

- **Will Bequests:** A bequest is a simple way to make a gift through your will. You can bequeath Scholarship America a specified dollar amount, percentage or balance of your estate, as well as gifting assets or properties.
- **Stock or Bond Transfers:** You can transfer stocks or bonds from your brokerage, and Scholarship America will receive the value of those accounts with their immediate sale. This gift also allows you to minimize payments of capital gains tax on appreciated accounts.
- **Retirement Assets:** By naming Scholarship America as the beneficiary of an IRA or other retirement account, you help further our mission while avoiding significant income or estate taxes for your heirs.
- **Insurance Policies:** There are several ways you can support students with an insurance policy. You can name Scholarship America as a beneficiary of a policy, we can take over ownership of a policy, or we can immediately “cash in” a policy, all of which directly support our work. (These options hold different tax implications, so consult with a financial professional.)
- **Customized Gift Options:** It is possible to set up other options, including Charitable Gift Annuities, Charitable Remainder Trusts, or establishing your own scholarship under our management. These options require more extensive planning and resources, so please contact us if you’re interested and we can talk them through.



Ready to Chat?

Contact Director of Development,
John Chandler, to discuss Planned Giving at
952-853-0675 or
jchandler@scholarshipamerica.org.

Learn more at **ScholarshipAmerica.org** or call toll-free
at **1-800-537-4180**.



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Scholarship America recommends you consult your attorney, financial advisor or tax consultant before making any investment decisions. Scholarship America is not an attorney or tax professional.