



Leave A Legacy

Support scholarships through planned giving

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 plan a 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.

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



Why Scholarship America?

80% of families say scholarships make college possible—and those scholarships pay for almost 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 eliminating financial barriers to education, ensuring no student has to give up on their dreams.

Your support of our mission makes it possible.

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:

1

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. See the next page for a checklist to get started.

2

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.

3

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.

4

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.)

5

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.

Use this checklist to guide you through the bequest process:

Reserve a Portion of Your Estate

Allocate a specific portion of your estate to bequeath upon your passing for scholarships. Clearly document your intentions to ensure your wishes are honored.

Specify Your Recipient

Outline the eligibility criteria for those you would like to benefit from your bequest. Consider allowing some flexibility to adapt to changes in the educational landscape at the time of your passing.

Designate Scholarship America

Clearly state that Scholarship America is your preferred scholarship administrator. This will ensure your funds are managed effectively and directed to deserving students.

Notify Scholarship America of Your Estate Planner

Inform Scholarship America of the estate planner you are working with. This will facilitate communication and ensure a smooth execution of your wishes.

Ready to Chat?

Contact Scholarship America's Development Office at **800-537-4180** or **giving@scholarshipamerica.org** to discuss Planned Giving.



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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.