



GIVING OPTIONS

A gift to the Alpha Sigma Phi Foundation will help to ensure that the Fraternity continues to be the co-curricular and continuing organization of choice for men.

By selecting one or more of the gift options described below, members will directly contribute to the mission and values of Alpha Sigma Phi in particular by exemplifying our value of charity. Contributors to the Foundation also enjoy the tax benefits available through the tax exempt organization status of the Foundation, to the extent permitted by IRS regulations (TAX ID number: 14-1908351).

GIFT OPTIONS:

One Time Gift:

A one-time gift to the foundation can be made payable by check, cash, credit card, stocks or publicly traded securities. Payments can be mailed to Alpha Sigma Phi Headquarters, 710 Adams St. Carmel, IN 46032, or called in to the Headquarters, 317-843-1911.

Appreciated publicly-traded securities can be transferred electronically, or through documents filed with your broker, to the Alpha Sigma Phi Foundation. The donor may avoid capital gains tax while receiving an income tax deduction based on the security's market value, subject to possible limitations that should be discussed with the donor's tax return preparer.

Recurring Gift:

A gift that is processed automatically on a schedule determined by the donor (i.e., monthly, quarterly, annually, etc.).

Pledge:

Pledge gifts are made over a designated time period up to five years. Pledge gifts can be made in the same manner as a one-time gift.

Planned Gift:

- Charitable Gift Annuities - A charitable gift annuity is a simple contract between you and our Foundation. In exchange for your irrevocable gift of cash, securities, or other assets, we agree to pay you a fixed sum each year for life. The older your designated annuitants are at the time of the gift, the greater the fixed amount Alpha Sigma Phi Foundation can agree to pay. In most cases, you may receive an immediate deduction for a portion of the value of the contract and part of each payment may be tax-free, increasing each payment's after-tax value. Payments may be made annually, semiannually, or quarterly.
- Bequests - Made through a will or living trust, donors may designate the Alpha Sigma Phi Foundation as the beneficiary of cash or other assets. While there is no lifetime tax benefits (other than possibly an estate tax deduction), making a bequest enables a donor to make a larger gift without impacting the donor's financial position during their lifetime.
- Beneficiary Designation - The donor names the Alpha Sigma Phi Foundation as a direct or contingent beneficiary of one or more retirement accounts, IRA's, life insurance policies, annuity contracts or other assets. Because the benefits are paid at death without jeopardizing the donor's financial security during life, this option allows for a larger or supplemental gift than might be possible during the donor's life.
- Life Insurance Policy - During the donor's life, he assigns a life insurance policy to the Foundation. If the policy is a "permanent" (not a "term") policy, the cash value of the donated policy is tax deductible, in addition to any future premiums the donor pays on the Foundation owned policy. The Foundation would be named the owner and beneficiary and will receive the death benefit upon the donor's passing.
- Bank Accounts and CDs - You can name the Alpha Sigma Phi Foundation as the "payable-on-death beneficiary" of your bank accounts (savings or checking) or on any certificates of deposit. Upon your death, the assets will pass directly to the Alpha Sigma Phi Foundation without going through probate. Visit your bank and request a beneficiary on your accounts or CDs. You can change beneficiary designations any time you wish.