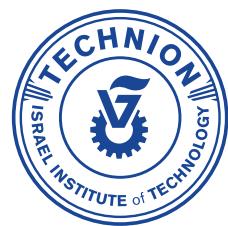


# To BUILD and SUSTAIN

Leave a Legacy and Help Generations To Come



A M E R I C A N  
**T E C H N I O N**  
S O C I E T Y



AMERICAN  
**TECHNION**  
SOCIETY

From VISIONARY EDUCATION  
to a WORLD of IMPACT



Dear Friend,

As a global leader in science and technology, Technion has a long and proud history of preparing students to become leaders, entrepreneurs, physicians, and scientists. An unparalleled focus on interdisciplinary education, combined with our breakthrough research, have led to advances on a truly global scale.

For nearly 100 years, Technion students and faculty have helped transform the world by solving some of the world's greatest challenges in science, medicine, cybersecurity, and the environment. Technion has discovered drugs that significantly extend the lives of cancer patients, invented breakthrough medical robots, created a technology that will enable a hydrogen economy that will help solve climate change, developed diagnostic devices for rapid, accurate, and non-invasive disease detection, and created technologies that make today's internet and electronic communication possible. We couldn't have done it without the generous financial support of people like you.

When you make a planned gift to Technion, you'll be making an investment in education, Israel, and the world. Your generosity will have an impact far beyond your lifetime. You will be supporting generations of students whose lives will be forever changed and who will go on to deliver sophisticated solutions to some of humankind's most pressing hurdles.

You'll be funding cutting-edge research, building new labs, and enabling us to grow interdisciplinary programs. You'll be building a powerful legacy that reflects your values and beliefs. The American Technion Society is honored that you are considering us in your estate plans, and appreciate your generosity.

Sincerely,

*Judy Sager*

**Judy Sager**

Executive Director of Planned Giving

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## GIFT THROUGH YOUR WILL OR TRUST

Where there's a will, there's a way

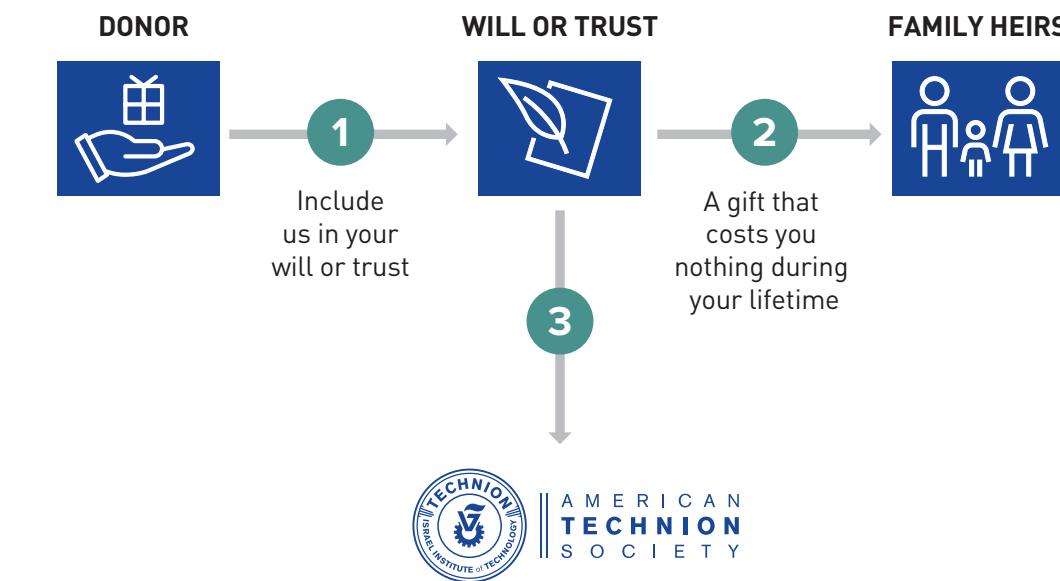


ILLUSTRATION: Gifts Through Your Will or Trust

Do you want to make a significant gift that will transform the future of Technion for generations to come? You can do it today — with a legacy gift through your will.

### How It Works

- » Include a gift to the American Technion Society in your will or trust
- » Make your bequest unrestricted or direct it to a specific purpose that has been approved by the American Technion Society
- » You may designate a specific amount or percentage of your estate to make a gift

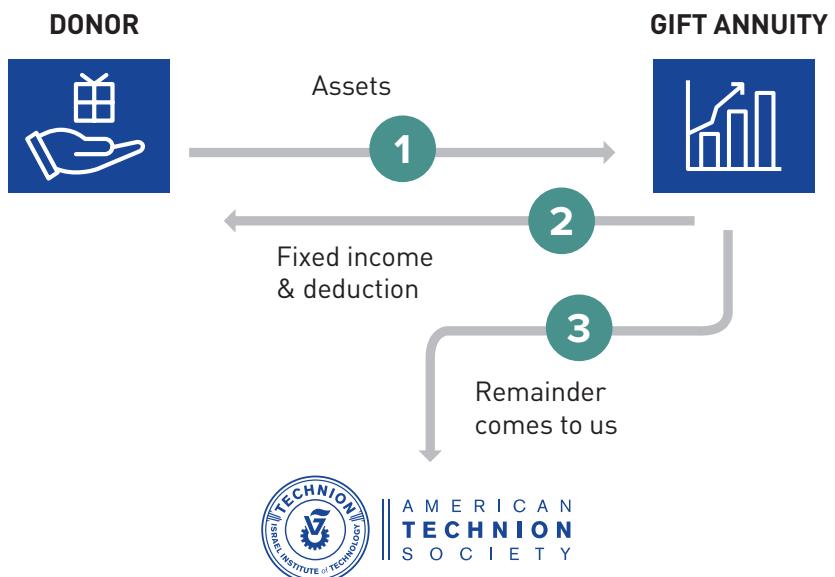
### Benefits

- » Your assets remain in your control during your lifetime
- » You can modify your gift to address changing circumstances
- » You can direct your gift to a particular purpose (be sure to check with us to ensure your gift can be used as intended)
- » Under current tax law, there is no upper limit on the estate tax deduction for your charitable bequests
- » Your heirs may receive an estate tax deduction depending on the value of your estate



# CHARITABLE GIFT ANNUITIES: IMMEDIATE

## A Gift That Gives You a Paycheck for Life



## Be Prepared

### The Language You Need To Make a Gift That Lasts

It's surprisingly simple to make a bequest. You don't even have to rewrite your will. All it takes is a few simple sentences and a five-minute phone call with your attorney. Use the sample language below to make the process even easier.

### Residual Gift

Comes to us after your estate expenses and specific bequests are paid.

I give and devise to American Society for Technion - Israel Institute of Technology, Inc. a 501(c)(3) tax-exempt organization, TAX ID 13-043-4195 located at 55 East 59th Street, New York, NY 10022 all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for Technion's general educational and charitable purposes.

### Specific Gift

Naming American Society for Technion - Israel Institute of Technology, Inc. as a beneficiary of a specific asset or amount from your estate.

I give and devise to American Society for Technion - Israel Institute of Technology, Inc. a 501(c)(3) tax-exempt organization, TAX ID 13-043-4195 located at 55 East 59th Street, New York, NY 10022 the sum of \$\_\_\_\_\_ (or name an asset) to be used for Technion's general charitable and educational purposes.

### Contingent Gift

American Society for Technion - Israel Institute of Technology, Inc., can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

If [insert name] is not living at the time of my demise, I give and devise to American Society for Technion - Israel Institute of Technology, Inc. a 501(c)(3) tax-exempt organization, TAX ID 13-043-4195 at 55 East 59th Street, New York, NY 11022 the sum of \$\_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for Technion's general charitable and educational purposes.

You can make a gift and receive guaranteed fixed payments for life. Payments may be much higher than your return on low-earning securities or CDs.

### How It Works

- » You give cash or securities. The American Technion Society pays you, or you and your spouse, or any two beneficiaries you name, a regular fixed income for life.
- » Later, when the annuity ends, the American Technion Society will apply the balance to support the Technion's students, faculty, or ground-breaking research

### Benefits

- » You receive an immediate income tax charitable deduction for a percentage of your gift amount
- » The security of stable cash flow *for life*
- » Receive partially tax-free income
- » Higher than average payments compared to CDs and savings accounts
- » Payments taxed less than regular income
- » Capital gains tax benefits when you donate appreciated assets

## CHARITABLE GIFT ANNUITIES: DEFERRED

### A Gift That Pays You Back

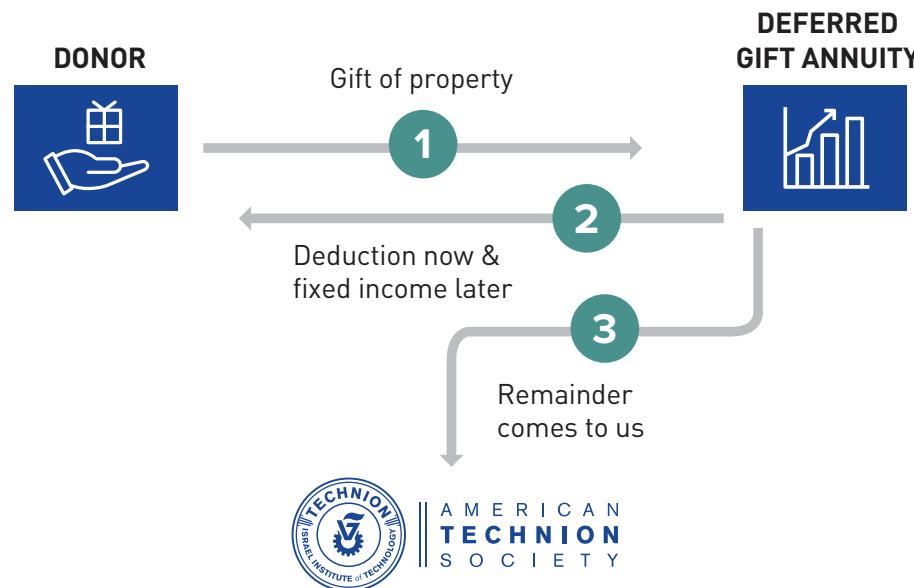


ILLUSTRATION: Gift through a Charitable Gift Annuity (Deferred)

You can make a gift and receive guaranteed fixed payments for life. Deferred payments are higher than an immediate payment annuity as well as many securities and CDs. They are ideal to supplement retirement income.

### How It Works

Perhaps you need to save more for retirement. Or, maybe you want the money to help pay for your grandchildren's education.

If you are facing these challenges, or any other that could be solved by making a gift now and receiving in return a fixed income in the future, a Deferred Gift Annuity is a great option.

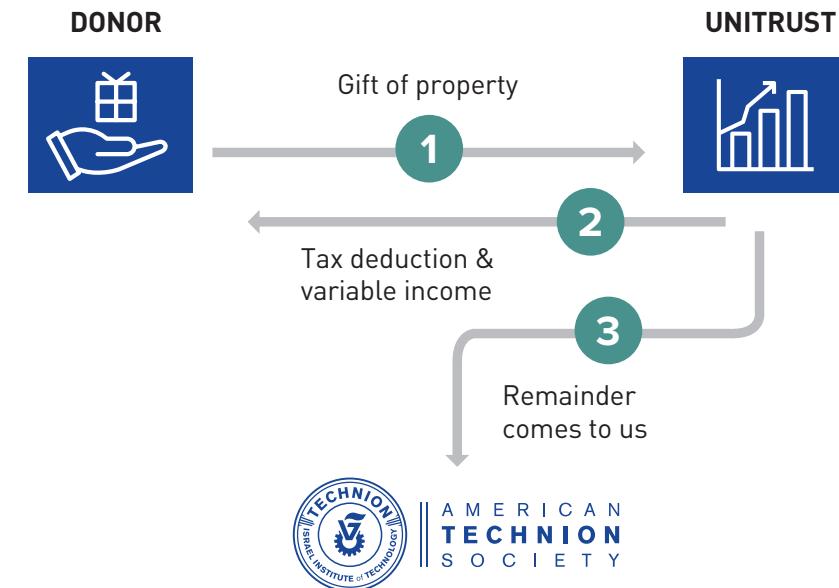
- » You give cash or securities now. The American Technion Society pays you, or you and your spouse, or any two beneficiaries you name, a regular fixed income for life beginning at a set time in the future.
- » You decide how long you want the deferral period to be

### Benefits

- » Because you make the gift now and don't start to receive payments until later, you enjoy a much higher payment rate than you might have thought possible
- » You receive an immediate income tax charitable deduction for a percentage of your gift amount
- » A portion of your annuity payments will be tax-free

## CHARITABLE REMAINDER UNITRUST

### A Gift With Built-in Flexibility



HOW IT WORKS: Charitable Remainder Unitrust

A great way to make a gift, receive payments that may increase over time, and defer, reduce, or eliminate capital gains tax.

### How It Works

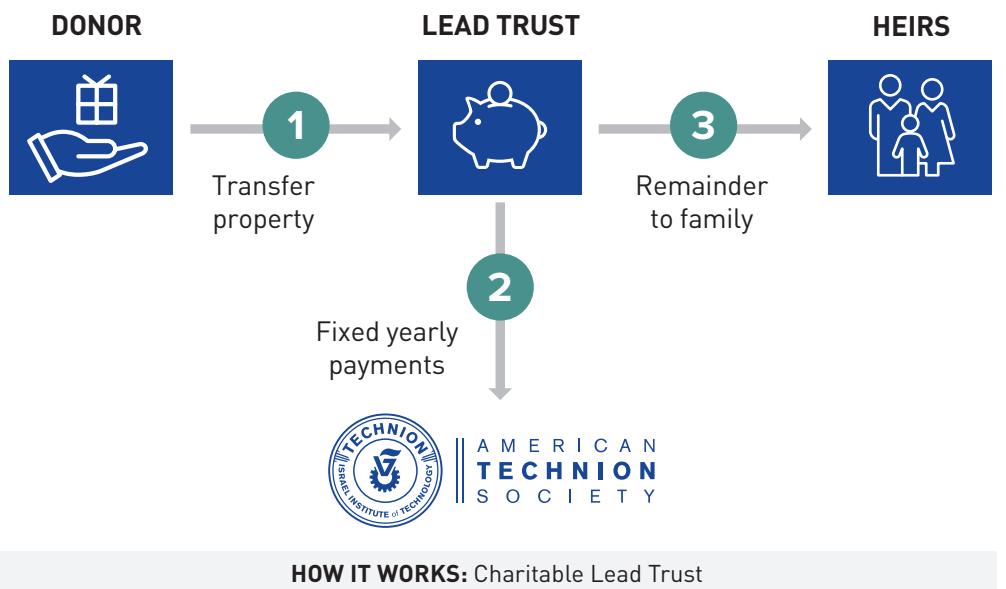
- » You transfer cash, securities, or other appreciated property into a trust. The required minimum for this type of gift is \$100,000.
- » The trust pays 5% of the value of its principal, which is valued annually, to you or beneficiaries you name
- » When the trust ends, the remainder passes to the American Technion Society to support Technion's students, faculty, and research

### Benefits

- » Receive income for life or for a term of years in return for your gift
- » Receive an immediate income tax deduction for a portion of your contribution
- » Pay no up-front capital gains tax on appreciated assets you give
- » You can make additional gifts to the trust as your circumstances allow for additional income and tax benefits

# CHARITABLE LEAD TRUST

## Preserve an Inheritance



A gift that allows you to transfer wealth with significant tax advantages. You greatly reduce or avoid possible gift and estate tax on assets passing to family, if some trust income goes to charity for a few years.

## How It Works

- » You contribute securities or other appreciating assets to a Charitable Lead Trust. Our suggested minimum gift is \$1,000,000.
- » The trust makes annual payments to the American Technion Society for a period of time
- » When the trust terminates, the remaining principal is paid to your heirs

## Benefits

- » Income payments to us for a term reduce the ultimate tax cost of transferring an asset to your heirs
- » The amount and term of the payments to the American Technion Society can be set so as to reduce or even eliminate transfer taxes due when the principal reverts to your heirs
- » All appreciation that takes place in the trust goes tax-free to the individuals named in your trust



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