

A Plan That Counts



Bowdoin

CLASS		WILLIAM COHEN		1949	
WILLIAM B. JACOB	1923	DONALD W. BRADEN	1940	PETER W. ELLIOTT	1966
LAMRENCE B. LINGHOTT	1925	ROBERT E. COLTON	1944	G. KARL GALINSKY	1943
NATHAN A. COBB	1926	CARL H. LEBOVITZ	1947	CHRISTOPHER HEFE	1964
ELMORITH E. CLARK	1927	STANLEY H. ALTMAN	1947	RICHARD B. COBB	1945
EDWARD C. BIXTON	1929	DAVID W. SOULON	1949	PETER G. HAUSER	1966
LORELL L. LINDFELLOW	1930	JOHN J. MULLANE, JR.	1950	PETER L. HANSON	1967
DONALD DEBY	1931	CARL B. BREWER	1951	KENNETH R. WALTERS	1968
ALBERT S. DAVIS, JR.	1933	JOHN D. BRADFORD	1952	KENNETH R. HIRSCHMAN	1969
CARL F.A. WEBER	1934	WILLIAM F. WYATT, JR.	1953	STEPHEN H. HARDY	1970
GEORGE F. EDWARDS	1935	THEODORE W. ROUSSEN	1954	R. P. TERPASTAUIS	1971
WILLIAM F. CARNES	1936	RICHARD R. HOPLEY	1955	ROBERT L. BASSETT	1972
THOMAS F. PHILSON	1936	RICHARD S. LYMAN, JR.	1957	RANDY J. LEASON	1973
NATHAN DANF, I	1937	ALLAN B. WOOLEY, JR.	1958	JAMES L. POLANITES	1974
HARLAN D. THOMAS	1938	CHRISTOPHER C. WHITE	1959	FREDERICK J. GREEN	1975
KOS S. BLISS	1940	ROBERT L. HOFFELBERG	1960	JANE M. EDWARDS	1976
DONALD DERBY	1932	JOSEPH J. SCAMUCHI	1949	PETER H. TRASK, JR.	1955
FREDERICK R. EAMES	1932	HARLAN B. PEARSON, JR.	1950	KINGSLEY G. METZ	1969
BERNARD S. CRYSTAL	1933	CARL B. BREWER	1951	STEVEN J. RUSTARI	1970
ALFRED S. HAYES	1934	FRANCIS H. WASS	1952	HARRY B. DEMETER	1971
PHILIP F. THORNE	1935	WILLIAM F. WYATT, JR.	1953	ROBERT L. BASSETT	1972
WILLIAM F. CARNES	1936	PAUL J. MORIN	1954	LEWIS D. EPSTEIN	1973
NATHAN DANF, II	1937	ROBERT H. TRASK, JR.	1955	JAMES L. POLANITES	1974
STUART G. P. SMALL	1938	JOHN R. FAIRMAN	1956	WILLIAM J. REES	1974
RICHARD H. MOORE	1939	KEVIN O. SULLIVAN	1957	MARK T. CICERO	62 B
FRANCIS R. BLISS	1940	ALLEN D. WOOLEY, JR.	1958		
WILLIAM B. HALL	1941	CHRISTOPHER C. WHITE	1959		
FREDERICK G. FISHER, JR.	1942	ANTHONY O. LEACH II	1960		
ROGER W. DRAGDON	1943	GEORGE R. DEL PRETE	1961		
ROBERT E. COLTON	1944	WILLIAM COHEN	1962		



Gift Planning

Throughout Bowdoin's history, alumni, parents, and friends have secured the future of the College by including it in their philanthropic plans. Gift planning arrangements will play an important role in the College's comprehensive campaign and help to ensure that Bowdoin remains an exceptional liberal arts college for generations to come.

Explore ways to have a meaningful impact on Bowdoin's future with a gift that best fits your personal and charitable objectives.



We hope you will consider joining the Bowdoin Pines Society by making a legacy gift to the College. You will be in the company of Bowdoin's most devoted alumni, parents, and friends.



Bowdoin College has over 1,000 alumni, parents, and friends who have joined the Bowdoin Pines Society as a result of creating a gift planning arrangement to support the College.

Ways to Give

Gift planning offers many options to provide for Bowdoin, as well as for yourself and your loved ones.

Will or Living Trust: A future planned gift through a will or revocable living trust.

Designation: A future planned gift from your bank, investment, or retirement account; donor-advised charitable giving account; or life insurance policy.

Life Income Gift: An outright gift to fund a charitable gift annuity or a charitable remainder trust that pays you an annual income for life and arranges a future planned gift of the remainder.

Retained Life Estate: A future planned gift of real estate that allows continued use of the property for life.

Promised Gift: An irrevocable pledge to make a future gift of tangible personal property during your lifetime that is binding on your estate and heirs.

“I realized it is time for my generation to provide for future Bowdoin students. I wanted to give back by making a legacy gift.”

Barbara Gross '77



Use appreciated securities
and avoid capital gains tax.

What to Give

Gift planning allows you to use different types of assets to receive the appropriate benefits for your situation.

Cash: In certain circumstances, an available charitable deduction may reduce your taxable income.

Securities: Avoid capital gains if held for more than one year.

Retirement Assets: Reduce or avoid estate and income tax.

Real Estate: With certain gifts, you can make a gift of your property, receive an available charitable deduction, and either continue to use your property for life or transfer it to fund income payments for life.

Personal Property: In certain circumstances, an available charitable deduction may reduce your income by the appraised value.

When to Give

Gift planning can happen at any time, but typically coincides with:

- income tax planning for tax deduction purposes; and/or
- making important decisions about your future and your family's, such as when you are drafting a will and engaging in the estate-planning process.

Gift planning can also take place in consideration of a significant life event, such as:

- marriage, divorce, the birth or death of a family member;
- retirement; and/or
- a large influx of taxable income, such as a bonus, sale of a business, a successful investment, or an inheritance.

Almost anyone can make a gift planning arrangement. Bequests and beneficiary designations are among the options that have no effect on your current finances.

They say you can't take it with you, but you can leave a legacy where the goals and outcomes are evident and extend human knowledge. A legacy gift keeps on giving—to future Bowdoin students and faculty, as well as to society.



Communicate Your Wishes

Sharing information about your gift plan for Bowdoin ensures that your wishes are understood by the College. You will be welcomed into the Bowdoin Pines Society, which includes alumni, parents, and friends who have made a provision for Bowdoin in their long-range planning. Your membership in the legacy society may encourage others to make similar arrangements. To inform us of your plans, please provide:

- documentation of the provision in your will or living trust; designation on a retirement, brokerage, bank, or charitable gift account; and/or information about your charitable lead or remainder trust;
- a copy of the signature page that includes the gift plan for Bowdoin College; and
- a completed Future Gift Intention Form that includes an estimated value of your gift plan for Bowdoin (downloadable at bowdoin.edu/bequestform).



Documenting your gift plan does not make it binding or irrevocable—you have the ability to revise your plan if your circumstances or priorities change.

Quick Planner

Will/Living Trust

Designation

*Charitable
Gift Annuity*

*Charitable
Remainder Trust*

*Retained
Life Estate*

*Promised
Gift*

I would like to make a gift:

During my life			X	X	X	X
Upon my death	X	X	X	X		X

I have the following assets available to make a gift:

Cash	X		X	X		
Securities	X		X	X		
Retirement assets		X				
Life insurance policy		X				
Financial account		X				
Real estate	X			X	X	
Other	X			X		X

Benefits that are important to me are:

Income			X	X		
Income tax deduction			X	X	X	X
Estate tax savings	X	X	X	X	X	X
Capital gains tax savings			X	X	X	X
Avoid probate		X	X	X	X	X
Lifetime control of assets	X	X			X	X

If my gift provides income, I prefer that it is:

Fixed			X	X		
Variable				X		



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Bowdoin

Please note that we are prohibited from giving legal or financial advice, and none of the information above should be interpreted as such. We encourage you to consult with your own legal counsel or financial advisor before deciding whether to proceed with a gift.