



## The Omega Society

**This gift will leave your lasting legacy, supporting our brothers in perpetuity.**

### Leave your legacy

There will come a time in all our lives when we consider how we want to leave our legacy. Your life's accomplishments are important to celebrate and honor. A charitable gift to Alpha Phi Delta Foundation is such a way to cement your legacy. Charitable gifts, including long-range estate and financial planning, can be a great way for you to provide support for Alpha Phi Delta. It is possible to "Leave a Legacy" while potentially minimizing taxes and settlement costs and conserving more of your estate for loved ones.

### What are the easiest ways to leave my legacy?

There are many ways to make an estate bequest. Here are two very straightforward types of giving:

- **Bequests** - A bequest is a gift made through a will or living trust. Bequests may be stated as a percentage of your estate, as the residual of your estate or a specific dollar amount. Here is some suggested language as a starting point for your attorney:
  - **Unrestricted** - "I hereby bequeath \$ \_\_\_\_\_ to Alpha Phi Delta Foundation, Inc., PO Box 23188, Pittsburgh, PA to be used for purposes as deemed appropriate by the Foundation's board of directors."
  - **Restricted** - "I hereby bequeath \$ \_\_\_\_\_ to Alpha Phi Delta Foundation, Inc., PO Box 23188, Pittsburgh, PA to be used in the following manner \_\_\_\_\_ in accordance with the Foundation's overall objectives."
  - **Contingent** - "Provided that my final estate valuation is greater than \$ \_\_\_\_\_, I hereby bequeath \$ \_\_\_\_\_ to Alpha Phi Delta Foundation, Inc., PO Box 23188, Pittsburgh, PA to be used for purposes as deemed appropriate by the Foundation's board of directors."
- **Retirement Accounts or Insurance Policies** - You can name the Foundation as beneficiary of a retirement account (401k or IRA) or a life insurance policy and secure important tax benefits. Just list the beneficiary as Alpha Phi Delta Foundation, Inc, tax ID # 31-1005845.

### What should I do first?

Please contact Bro. John Hadgkiss, Beta Rho '66, [johnhadgkiss@apdfoundation.org](mailto:johnhadgkiss@apdfoundation.org) if you'd like to step through your options. Or simply inform John of the bequest once it's made. All we need is your written verification. If you have already included Alpha Phi Delta Foundation in your estate plan, please let us know so that we can award you the Omega Society pin.

*Each of the deferred giving types is closely regulated by law and requires special arrangements and tax treatment. Alpha Phi Delta Foundation, Inc. can work with you and your attorney to ensure your wishes are documented correctly.*

**Alpha Phi Delta Foundation, Inc., a 501(c)(3) tax exempt organization**