

United States Air Force Academy Class of 1973



50th Reunion Legacy Class Gift Program Plan Options

July 2019



Fellow Classmates:

While our primary class goal is that no classmate dies without a will or plan in we also hope you will consider the Academy in some way in your estate plan...as part of our 50th reunion Class Gift.

Your gift to the Academy can be done in many ways:

1. Charitable bequests in a will or trust: after you consider the needs of your family you can then consider bequests toward programs/purposes/passions. In your will/trust you can leave a defined sum of money, real or personal property, a percentage of the estate, or a percentage of the residual estate (after other designations have been made to heirs).
2. Beneficiary designations: you can designate that an insurance policy, brokerage or savings account, IRA, etc. be designated toward your choice of Academy programs.
3. Life income gifts: If you and/or your spouse require steady income for life you can designate assets (usually appreciated securities) for a charitable gift plan, enjoy the income with the possibility of income tax savings.
4. Other real property gifts: there are several options if you have a home or vacation property you want to enjoy but make a charitable transfer, some with tax advantages.
5. There are a number of less usual methods to ensure your legacy gift is executed toward your specific purpose and advantage.

Four+ popular ways to leave a legacy to the Academy as you write or revise your estate plan:

1. The Class of 1973 Long Blue Line Endowment: an endowed fund established by our class supporting Association of Graduates programs to benefit the Academy, cadets, and graduates.
2. The Class of 1973 NCLS Endowment: this is the same fund we established at our 40th reunion that endowed our Flagship sponsorship for NCLS in perpetuity. Legacy gifts toward this purpose will raise the quality of the program to a really high level.
3. The Class of 1973 Support for the USAFA Endowment: gifts to the USAFA Endowment that are unrestricted, to be used for one or more of the following purposes: cadet programs, support for the Association of Graduates and other Academy-affiliated foundations, and operations of the USAFA Endowment.
4. Your own program: call or write me on this and we'll chat about the possibilities. There are already 300+ funds in place that may fit what you want to support. Or you may have your own program you want to support. Either way, I can provide ideas and connect you with the right person to make it happen.

I recommend seeking advice or assistance from an attorney or professional advisor on how best to create a plan that meets your needs. I am not such an advisor, but if you have questions I know where to go for answers. The USAFA Endowment has been hugely helpful in this regard.

Thanks, in advance, for considering legacy giving.

Cheers, Bob

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PS: If you have already provided a portion of your estate to the Academy, please send a note to munson1@comcast.net. And thanks!