arning a bachelor’s degree in electrical engineering and a master’s degree in management science, Paul “PJ” Prutzman ’66 ’68G knew firsthand the caliber and talent of Lehigh graduates and, during his 34-year career at Air Products, hired nearly 20 of them to join his team.

“We hired from Lehigh like crazy. The graduates came out with solid analytic abilities. They could solve problems and create improved systems,” says PJ, who recruited extensively from the industrial engineering department and the business school in operations research. “At one time, nearly three-quarters of our senior management in the information technology organization held Lehigh degrees, and we had a world-class department.”

Having retired from Air Products in 2002 as director of computing services, PJ wanted to continue helping Lehigh, but in a different way. He and his wife, Margie, consistently supported Lehigh initiatives with their philanthropy and decided that establishing a gift annuity was the perfect next step at this point of their lives.

“We have been very fortunate to be in a position to give back. The gift annuities are a really neat way of making a tax advantaged gift that produces a stream of income,” says PJ, who established four gift annuities with the intent to create a Lehigh endowed fund in their names.

“I’ve heard at Tower Society breakfasts what kids are experiencing in their vast opportunities through Lehigh and what they will be able to do for society with their backgrounds,” Margie says. “It makes us want to support what Lehigh is accomplishing.”

President of Delta Chi and a member of the men’s swimming and soccer teams as an undergraduate, PJ knows that the benefit of his Lehigh education is immeasurable.

“At a certain point, you say, ‘It is time to give back,’” he reiterates.

To learn more about gift annuities, or other ways you can support Lehigh University, contact the Office of Planned Giving at (610) 758-4749 or intower@lehigh.edu.
In less time than it takes to brew a pot of coffee, you can make a lasting impact at Lehigh University.

HERE’S HOW:
One of the easiest gifts you can make is to name Lehigh University as a beneficiary of one of your assets, such as your retirement plan or life insurance policy. This is a popular gift to give because you can set it up by yourself. There’s no need to use the services of an attorney or financial advisor to put your gift in place.

YOUR SUPPORT MATTERS
No matter the size, your gift makes a meaningful difference at Lehigh University. Contact the Office of Planned Giving at (610) 758-4749 or intower@lehigh.edu to learn more about making a commitment that doesn’t cost you anything today. If you’ve already done so, please let us know so we can thank you for your generosity and ensure that your future gift is used exactly as you intend.

SIMPLE STEPS TO FOLLOW:

CONTACT the administrator of your retirement plan, insurance policy or bank account for a change-of-beneficiary form or simply download a form from your provider’s website.

DECIDE what percentage of the account you wish to give to Lehigh and name us, along with the stated percentage, on the form along with the purpose on campus you wish to support.

SIGN AND RETURN the form to your plan administrator or insurance company.

TELL US about your gift! It would be our honor to thank you for your support and welcome you into the Tower Society.
You’ve worked hard, saved diligently and are ready to enjoy your retirement years. Maybe you’re also looking for a way to give back to the organizations and causes that have been important to you. You might wish to consider making a gift from your IRA.

If you’re 70½ or older, you can use the IRA charitable rollover to make a tax-free gift to Lehigh University. This law allows you to transfer up to $100,000 directly to a qualified charitable organization without paying income tax on the distribution.

When you use the IRA charitable rollover to make a gift to Lehigh:

• Your gift will be put to use today, allowing you to see the difference you’re making for our students.
• You pay no income taxes on the gift. The transfer doesn’t generate taxable income or a tax deduction, so you benefit even if you do not itemize your tax deductions.
• If you have not yet taken your required minimum distribution for the year, your IRA charitable rollover gift can satisfy all or part of that requirement.

LET US HELP
You don’t need to be an expert in retirement planning to make a gift from your IRA. Contact the Office of Planned Giving at (610) 758-4749 or intower@lehigh.edu to get started.

WANT TO SUPPLEMENT YOUR RETIREMENT INCOME?

When it comes to supporting Lehigh University’s mission, the charitable gift annuity is one method favored by many of our donors. When you set up a gift annuity with us, we’ll provide you with lifetime payments that remain constant even with a fluctuating stock market. This offers you the opportunity to supplement your retirement income and continue to make a difference at Lehigh University.

To learn more about charitable gift annuities, or to request individualized calculations, contact the Office of Planned Giving or go to lehigh.edu/plannedgiving.

Not 70½ Yet?
You can still support Lehigh’s mission with your IRA. Simply name Lehigh University as a beneficiary of your account, and we’ll receive the funds, or the portion you designate, after your lifetime.
GET A JUMP ON 2018
CROSS ESTATE PLANNING OFF YOUR TO-DO LIST

A new year will offer a fresh start on your personal goals and resolutions. It’s also the perfect time to take stock of where you are in your estate planning.

WHEN SURVEYING YOUR PLAN, MAKE SURE YOU REVIEW THE FOLLOWING:

☐ WILLS AND TRUSTS. Review your will or trust for any life change such as a birth, death, marriage or a move to a different state.

☐ BENEFICIARY DESIGNATIONS. Remove any beneficiary on your life insurance or retirement plans who is deceased or is a former spouse, and consider adding Lehigh University or other charitable organizations near and dear to you.

☐ DURABLE POWER OF ATTORNEY. Make sure your durable powers of attorney for financial matters and health care are current. A copy of the financial power of attorney should be given to your family members, and a copy of your health care power of attorney should be provided to both family members and health care providers.

☐ SAFE-DEPOSIT BOX. Catalog the contents of your safe-deposit box. Give a written copy to a trusted family member and note any items you are holding for someone else.

☐ BANK OR BROKERAGE ACCOUNTS. Name designated heirs or Lehigh University as recipients of bank or brokerage account proceeds at your death.*

☐ CHARITABLE CONTRIBUTIONS. If you’ve included a gift to Lehigh in your estate plan, review the details of your gift and let us—and your loved ones—know of your intentions. This will guarantee that your wishes are carried out after your lifetime.

* State laws govern payable-on-death accounts and transfer-on-death accounts. Please consult with your bank representative or investment advisor if you are considering these gifts.

SHARE YOUR STORY

We all have a set of values and beliefs that guide our lives. As you prepare for the future, make sure your loved ones are aware of those principles by creating a legacy letter. Our complimentary guide 7 Questions to Help Build Your Legacy can help you get started. Request your copy using the enclosed reply card.

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