When Andy Hoke ’20, a journalism and history major, was growing up in the Lehigh Valley, Lehigh University was always on his radar. When it came time for him to choose a university, what really set Lehigh apart was the comprehensive scholarship and financial aid package, including the O-Driscoll-King Scholarship—a fund borne from a charitable remainder trust.

“I never would have been able to attend Lehigh without this scholarship,” Hoke recalls. “It really was the deciding factor.”

Hoke entered Lehigh as a statistics major and realized early on that path did not appeal to him. He credits the support system he had at Lehigh with helping him find his passion for journalism and history.

“I realized I was interested in research and writing, in putting my thoughts into words and being out in the world.”

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Thanks to a scholarship funded by an alumnus, Andy Hoke ’20 can receive a Lehigh education and pursue his passion in sports journalism.

The percentage of students who receive financial aid. The Lehigh Fund and scholarship endowment support this top priority.

Our goal of first-generation students in the Class of 2025.
SKY IS THE LIMIT THANKS TO A SCHOLARSHIP

Continued from Page 1

Since changing his major, Hoke has fully immersed himself in his interests. He is an associate sports editor for The Brown & White and had the opportunity to work for a media company in Singapore through the Iacocca International Internship program. As for his future aspirations, he is adopting a sky’s-the-limit mentality: “I really like sports media. Maybe I’ll work for ESPN or NBC Sports, or maybe I’ll get a Ph.D. I’m keeping an open mind. As long as I follow my passions, I’ll enjoy it.”

When reflecting on what the O-Driscoll-King Scholarship means to him, Hoke says, “I want to express my full gratitude. I don’t know where I would be if I hadn’t attended Lehigh. I don’t know if I’d be on the same path. My scholarship set the tone for my entire future. I don’t take it for granted.”

Give and Receive
A charitable remainder trust is an effective option to make a lasting impact on Lehigh and help students like Andy Hoke, all while receiving income to maintain your lifestyle. The trust is funded by appreciated securities you have owned for more than one year and may ultimately boost your cash flow, provide you with a tax-saving charitable deduction and eliminate up-front capital gains tax on the appreciation. Even if your stocks have lost value in recent years, they are still appreciated if their current value is more than what you originally paid for them.

A charitable remainder trust pays a flow of income to you and anyone else you name, typically for your lifetimes or for a period of up to 20 years. At the end of the trust term, the remaining assets inside the trust support Lehigh’s mission.

“MY SCHOLARSHIP SET THE TONE FOR MY ENTIRE FUTURE. I DON’T TAKE IT FOR GRANTED.”

— Andy Hoke ’20, journalism and history major

By creating a charitable remainder trust, you can support your future, Lehigh’s future and the futures of many Lehigh students for generations to come. To get started, contact the Office of Planned Giving at (610) 758-4749 or intower@lehigh.edu.

EXPERIENCE AND IMPACT

88% Percentage of Lehigh students who have completed one or more internships or an experiential learning opportunity.

250 Number of study abroad programs, in 74 countries.
SHAPE OUR FUTURE AND RECEIVE LIFETIME PAYMENTS

Have you ever wondered how to turn your personal experience with Lehigh University into a legacy that will impact future generations? By including Lehigh in your long-term estate or financial plans, you can make a powerful testament of your priorities. And because there are several ways to accomplish this, you have the flexibility to fulfill your goals in a way that works best for you. One option, called a charitable gift annuity, allows you to shape our future while you receive fixed, dependable payments for life.

How It Works (It’s Easier Than You Think)
The concept of a gift annuity is simple. You make a donation using cash, marketable securities or other assets. In exchange for your gift, you receive fixed payments for life. The rate of payment you receive doesn’t fluctuate with the stock market, interest rates or inflation. It is firmly set at the time of your gift and never changes.

What Are the Benefits of a CGA?
- You have potential to receive increased disposable income.
- You are eligible for an income tax deduction for a portion of the gift, if you itemize.
- A portion of your payment is income tax–free throughout your estimated life expectancy.
- Any long-term capital gains income can be reportable over your life expectancy, in most cases.
- After your lifetime, the remaining balance is used to enact positive change in the classroom, on campus and around the world.

Contact us with questions about charitable gift annuities and to discuss current payment rates.

THE LIFESTYLE YOU DESERVE
Make sure your retirement plans cover your lifestyle needs. For more information, use the enclosed reply card to request the free guide Retirement Income Plans: Ways to Pay You More.
MAKE THE GIFT OF A LIFETIME

An endowment is a forever gift; a way to ensure your support for the places and institutions you care about most, like Lehigh University, lives on forever. When you establish an endowment, or contribute to an existing one, you create a lasting legacy that reflects your values.

How an Endowment Works
When you make an endowed gift to Lehigh, only a small portion of your gift will be spent each year. The balance is invested, allowing the gift to live on in perpetuity.

Funding Your Endowment
There are many ways to fund your endowment without using cash. Some allow you to establish your gift now, while others will not go into effect until after your lifetime.

- **Appreciated assets.** Using appreciated assets that you have owned for more than one year may allow you to eliminate capital gains tax on the asset's appreciation.

- **Life insurance.** Name Lehigh the beneficiary of your life insurance policy, or make us the owner of a policy you no longer need.

- **Retirement plan assets.** Consider naming Lehigh beneficiary of your retirement plan assets. After your lifetime, the funds will go to establishing your endowment.

- **A gift in your will or living trust.** Your gift to Lehigh can be a specific amount or a percentage of your residuary estate.

Ensure your support for our students lives on for generations to come. Contact the Office of Planned Giving at intower@lehigh.edu or (610) 758-4749 to get started.