



Advisor's Guide for Giving

Outright gifts:

Consider outright and planned gifts to support your favorite DelVal programs and initiatives. By combining a current gift with a planned gift in your will, your gift will keep on giving. Gifts can be directed to areas including the annual fund to support academics, emergency financial aid to help students in need, and the university strategic initiative fund to support new and emerging programs.

Gifts from wills and trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name Delaware Valley University in your will or trust for a specific amount please use the following suggested language:

"I hereby give the residue (or _____ percent of the residue) of my estate to Delaware Valley University, Tax I.D. #23-1352665, an independent, comprehensive four-year residential institution in Doylestown, Pennsylvania, to further the objectives and purposes of the University (or specify the School, Division or Department at DelVal)."

Charitable gifts may also be a percentage of an estate, residual or contingent. Please contact Maryann Fox for more information. Please note: Gifts in a will are fully revocable and can be updated at any time.

Gifts of appreciated securities:

Please contact Maryann Fox for a stock transfer form.

Beneficiary gifts from retirement plans, life insurance, brokerage accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Maryann Fox.

For outright gifts of life insurance, gifts involving real estate, charitable remainder trusts, charitable gift annuities or any other type of deferred gift:

Please contact Maryann Fox.



Maryann Fox
Executive Director of Major Gifts
700 East Butler Avenue
Doylestown, PA 18901
Phone: 215.489.4528
Email: Maryann.Fox@delval.edu

Legal Name: Delaware Valley University **Tax I.D. Number:** 23-1352665 **Incorporated In:** Doylestown, PA
Delaware Valley University is a private 501 c(3) nonprofit institution. Contributions are tax deductible.

Note to Attorneys, Accountants and other professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please call me at 215.489.4528. Best wishes, Maryann Fox, Executive Director of Major Gifts

Founders Society Enrollment Form

YES I wish to become a part of the Delaware Valley University Founders Society.

Full Name

Street Address

City/State/Zip

Telephone

Email:

Name(s) (as you would like it to appear in the Founders Society). If you wish to remain anonymous, please write the word "anonymous" on this line:

Class year/affiliation:

I have made a gift to DelVal by one or more of the following:

- Will Living Trust Charitable Remainder Trust Bank or investment account Real Estate
 Retirement Plan Life Insurance Annuity Other: _____

Current estimated value of the gift is approximately \$_____ or _____% of the above planned gift.

Signature

Date

Spouse's Signature (if applicable):

Date

Your membership in the Founders Society means:

- The amount of your intended gift is never disclosed and all information is held in complete confidence.
- You retain the right to update and change your charitable estate plans at any time.
- Your name will be included in a place of honor within publications or you may remain anonymous.
- You will receive invitations to special, exclusive events.

There is no minimum planned gift amount to become a member of the Founders Society. Your membership will be completed with this signed and returned form. If you have a question, or need more information, please contact Maryann Fox, Executive Director of Major Gifts, at 215.489.4528 or Maryann.Fox@delval.edu