

50th Reunion Gift Form



IN HONOR AND RECOGNITION OF OUR 50th REUNION,

I intend to join my classmates in contributing to our 50th Reunion class gift (REUN3013) with a total gift of:

- One-time \$ _____
- Monthly \$ _____ each month for _____ months for a total of \$ _____
- Multiyear Commitment:

I/We commit a total of \$ _____ to support the 50th Reunion class gift with payments of \$ _____ per year for _____ years. The first payment of \$ _____ will be made on or about _____.

Note: If making a multiyear commitment, the minimum total is \$3,000. All pledges under \$25,000 must be paid within three years. Multiyear commitments totaling \$25,000 or more may be paid over five years. Reminders will be sent annually. Gifts of less than \$3,000 may be spread out over time through automated monthly payments.

My/our support for Principia will be fulfilled in one of the following ways:

- Through personal funds (check or personal credit card)
- Through a family foundation (Note: Pledge intentions to be fulfilled by a family foundation or fund will be recorded as a pledge by the family foundation, though the individual donor(s) will be recognized.)
- Through a donor-advised fund (Note: Gifts given via a donor-advised fund cannot fulfill a personal pledge. This is our current practice, in keeping with IRS regulations. The individual donor(s) will be recognized in all Principia donor lists. All intentions to support Principia through a donor-advised fund will NOT be entered as a pledge but rather as a non-binding intention.)

HOW TO GIVE

- Check:** Payable to The Principia (Please note 50th Reunion class gift on the memo line.)
- Credit Card:** Mastercard Visa AmEx Discover

Card number: _____ Expiration date: _____

Name on card: _____ Security code*: _____ Phone: _____

**Security code and phone number are required for credit card gifts.*

For PLANNED GIVING, please see the next page.

DONOR INFORMATION (Please fill in or correct all relevant information below.)

Donor name: _____ Email: _____

Spouse name (if included in this gift): _____ Email: _____

Address: _____

City: _____ State: _____ Zip: _____

Cell phone: _____ Spouse cell phone: _____ Home phone: _____

Signature (required): _____ Date: _____

Signature (required): _____ Date: _____

- Please do not include my name on published donor lists for the fiscal year in which my gift is received.

FOR INTERNAL USE ONLY

Donor ID _____ Spouse ID _____

2050RU7071

Gift Number _____ Pledge Number _____

Campaign 1: __20REU__ Designation 1: __REUN3013__ Campaign 2: _____ Designation 2: _____

If circumstances change so that the purposes for which the fund was originally established become illegal, impractical, or impossible to fulfill, or they are no longer consistent with the programs and activities of The Principia, the chief executive may designate an alternative use for the fund, giving consideration to the donor's interests as evidenced above.

DONATE STOCKS OR SECURITIES

Provide this information to your financial advisor:

- DTC# 0443
- Pershing, LLC
- For Credit to account: N7M100624
- Client account name: This Principia Corporation Please include the note "2020 CO 50th Reunion"

EMPLOYER MATCHING GIFTS

Employer matching gifts can supplement your giving efforts. Many employers sponsor matching gift programs and will match charitable contributions made by their employees. Some companies also match gifts made by retirees and/or spouses. For additional details, check with your current or former employer.

I will be completing a matching gift form from my employer and mailing it to Principia.

Name of employer: _____

Employer matching gift programs generally will not commit to satisfying personal pledges. For this reason, matching funds cannot count as payments for personal pledge commitments. Matching gifts do qualify for full recognition credit and for credit toward projects as appropriate.

PLANNED GIVING

Planned gifts allow you to provide financial support to Principia through your estate or other deferred gifts that have specific tax advantages. Bequests, charitable gift annuities, charitable remainder trusts, real estate, life insurance, and retirement plans are common vehicles for planned giving.

I/We would like to learn more about making an estate commitment or a life income gift to Principia. Please contact me/us with more information.

An IRA charitable rollover allows individuals who are at least 70½ years old to make a qualified charitable distribution of up to \$100,000 from a traditional IRA to Principia tax-free. This donation counts toward the minimum IRA distribution required to be taken each calendar year. Distributions must be made **directly from the IRA to Principia** when the donor normally takes an IRA distribution. Those with check-writing privileges on their IRA accounts can write individual checks from the IRA. Other donors should contact their IRA administrator to put the details in place properly. Principia's Tax ID number is 43-0652667. The distribution should have your name and note REUN3013 so that it will be credited to your class gift.

I/We would like to learn more about donating through an IRA charitable rollover. Please contact me/us with more information.

Please return this form to: Kevin Capp, Director of Development Programs and Annual Giving

The Principia
Annual Giving
13201 Clayton Road
St. Louis, MO 63131-1002

Office: 314.514.3116
Fax: 314.275.3577
Email: kevin.capp@principia.edu

If you have any questions about your gift, please contact Kevin Capp.