

November 30, 2021

Dear Classmates,

We were not able to schedule a 50<sup>th</sup> Reunion celebration for our Class this past fall. COVID and other restrictions were not kind to us. But we expect we will be able to celebrate together in the fall of 2022, and a committee of our classmates is beginning to work on planning that reunion. I look forward to connecting with one another and with YDS next fall to celebrate our 50<sup>th</sup>(+1) reunion. As part of our reflections and celebrations, I hope you will consider this reunion as a significant component of your philanthropic giving.

Over fifty years ago, the generosity of those who came before us were the shoulders on which YDS shaped our personal and professional lives to come. Now we have the generous opportunity to be those very shoulders on which present and future students build their lives and work ahead.

The highest fundraising priority for YDS and Dean Sterling is to increase financial aid to provide full tuition support for every student with demonstrated need. Once meeting that goal, Dean Sterling wishes to address supporting living expenses for our students. The result of success in these areas will be that our students will graduate with a greatly reduced – even zero – debt burden. As Dean Sterling has said, “This debt burden makes it difficult for students to embrace the lives of ministry and service to which they are called.”

To commemorate our Reunion, I ask you to help YDS students by considering a reunion gift in the following three ways:

1. **Contribute to the YDS Annual Fund** before June 30, 2022. **All** (100 percent) of our Annual Fund gifts support current student financial aid. (Thank you to those that have already given this year.)
2. **Make an additional gift to the “YDS Class of 1971 Scholarship Fund.”** We are launching a bold plan to create an endowed scholarship fund in the name of our Class ensuring permanent financial aid for students for many years to come. We need specific commitments totaling \$50,000 to accomplish this. Upon reaching this goal, our new endowed scholarship fund will qualify for \$25,000 in additional YDS match funds. Commitments may be paid over five years to spread out payments and help us reach the endowment threshold. So please make a specific pledge to help us reach our goal.
3. **Consider including YDS in your estate plans or other planned giving option.** I have personally included a bequest to YDS in my will. In addition, several years ago, I

established a charitable deferred gift annuity for YDS to express my gratitude and to enhance my retirement income planning. As our reunion celebration approaches, please consider joining me with your own planned gift.

I have included more information about each of these giving opportunities in this packet. Please consider participating in those that are right for you.

Yale Divinity continues to foster diverse, demonstrated leadership in the academy, church, and society. As you consider the 50<sup>th</sup> Reunion giving opportunities above, please do not hesitate to contact Rod Lowe, Sr. Associate Director of Major Gifts, (203-432-8127 direct dial or [rodwin.lowe@yale.edu](mailto:rodwin.lowe@yale.edu)) if you have any questions or concerns.

It's going to be terrific to come together again, and I can hardly wait.

With gratitude,

A handwritten signature in black ink, appearing to read "Wes".

**Wes Poling '71 M.Div.**

carolandwesp@sbcglobal.net

*Yale Divinity School Annual Fund Agent*

# Yale

## Divinity School Class of 1971 50th Reunion Gift Intention

Yale Divinity School appreciates the generous support of its alumni and friends, whose gifts help sustain excellence. Reunion gift intentions may be paid over a five-year period and directed according to the donor's preferences. To state your gift intentions, please complete and mail or e-mail this form to the address below. Gifts are subject to Yale's investment and administrative policies.

Please accept my ☐ one-time / ☐ multi-year gift(s) of:

\$ \_\_\_\_\_ to support the YDS Annual Fund.

\$ \_\_\_\_\_ to support the YDS Class of 1971 Scholarship Fund.

\$ \_\_\_\_\_ for \_\_\_\_\_

☐ In Honor ☐ In Memory of \_\_\_\_\_

☐ I wish to remain anonymous.

☐ I wish to pay my multi-year gift using the following gift intention schedule:

	____ / ____ /2021	____ / ____ /2022	____ / ____ /2023	____ / ____ /2024	____ / ____ /2025
	MM/DD	MM/DD	MM/DD	MM/DD	MM/DD
Annual Fund	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Class of 1971 Scholarship	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Other:	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

☐ My check is enclosed. (Please make checks payable to Yale Divinity School.)

☐ Please charge my credit card:

☐ Visa ☐ MC ☐ Discover ☐ AmEx

/

Card Number

Exp. Date

Signature of Cardholder

Date

Contact Information

☐ Address change indicated

Name

Address

City

State

ZIP

Yale's Federal Tax ID:

06-0646973

Preferred Telephone

☐ cell ☐ home ☐ work

Please mail your completed form to:

Emily Reid  
Development Office  
Yale Divinity School  
409 Prospect Street  
New Haven, CT 06511  
203.432.5359  
emily.reid@yale.edu

For more information about gifts of securities or mutual fund shares, please contact 203.432.4107 or donated.securities@yale.edu

Please include matching gift form, if applicable.

To see if your employer matches gifts, visit [www.matchinggifts.com/yale](http://www.matchinggifts.com/yale)



# Yale

## Divinity School 50th Reunion

### *What is 50th Reunion Giving?*

The 50th Reunion Gift creates a unique opportunity for you individually and with your class collectively to create a lasting legacy that reflects how Yale Divinity School has shaped and enriched your life. We hope you will consider your 50th Reunion Gift as a significant component of your philanthropic planning.

To commemorate this milestone, we ask 50th Reunion class members to make a meaningful gift that dovetails personal philanthropic goals with the Divinity School's priorities.

Gift crediting for the 50th Reunion gift is broadened to include current gifts designated for the Annual Fund, capital purposes like scholarships and future gifts established through estate plan provisions or other vehicles. In addition, a multi-year time frame for giving allows the 50<sup>th</sup> Reunion class to make an important impact on current programs while also strengthening the foundation for YDS's future.

### *Why will I be asked to increase my support of YDS in honor of my 50<sup>th</sup>?*

YDS depends upon the generosity and spirit of each 50th Reunion class to sustain the School's commitment to educate future leaders for church *and* society. Your gift will have an important and far-reaching impact, and everyone in your class is encouraged to participate in the 50<sup>th</sup> Reunion Gift.

Levels of support vary from person to person, but your class volunteers will ask everyone in the class to consider supporting your Reunion gift in the following three ways:

- YDS Annual Fund (100% of which supports current student financial aid)
- Make a pledge over a 3- to 5-year period to the Class of 1971 Scholarship Fund (or perhaps create a separate fund in your name or the name of a loved one or in honor of a faculty member)
- Include YDS in your estate plans

All gifts and pledges for up to five years (since July 1, 2017), whether for the Annual Fund, the endowment or planned giving, will be included in the reunion giving total announced at Reunion.

Class volunteers and YDS staff are available to help you explore creative ways to structure your gift to best meet your family, financial and philanthropic goals.

### *My resources are limited for a large gift now but will including YDS in my will help?*

**Yes!** Donors who document their intention to include YDS as a non-contingent beneficiary of their estate plan will receive credit in the fiscal year in which the intention is documented at a discounted value based on the age of the youngest individual upon whose death YDS receives the bequest. This age, usually a minimum of 65 years, is determined as of June 30 of next fiscal year (July 1, 2022-June 30, 2023).

To document a bequest intention for gift credit, a donor is asked to complete a Bequest Intention Form and to provide a copy of the relevant portion of his/her will or trust. On the Bequest Intention Form, the donor is asked to provide or estimate the current value of the bequest.

### ***How will my gift be used?***

The highest priority for YDS is enhancing scholarship support. We ask that reunion class members give to a scholarship fund established by your class or to establish a fund in your name or in honor of a loved one.

A capital (endowment) gift may be made with a current gift to the YDS or a future gift (such as the inclusion of YDS in your will) or by a combination of the two. The minimum amount to establish a new endowed scholarship fund is \$50,000. A new endowed scholarship fund can be seeded with a current gift in honor of your 50th Reunion and plans can be put in place to fully fund it at a later date with additional lifetime gifts and/or through your estate. Once a scholarship fund reaches a minimum of \$50,000, income will be distributed annually to a student as the Class of 1971 Scholar.

### ***When should I make my gift?***

All commitments, including multi-year pledges, should be in by October 15, 2022 to be announced at Convocation, but however, please consider making your gift or pledge by June 30, 2022.

### ***What about Corporate Matching Gifts?***

Even in retirement, many companies will match employee contributions—in some cases doubling or even tripling your gift. If you are associated with a matching gift company, please obtain a matching gift form from your human resources department and send the completed form to YDS with your gift.

### ***Crediting of reunion gifts***

A donor's *combined* reunion gift total includes all new gifts and gift intentions (pledges) made since your last reunion (July 1, 2017 – to present): Annual Fund contributions; capital gifts and gift annuities for special purposes; and documented bequest intentions.

### ***When are Reunions? And what happens during Reunions?***

Plans are underway to celebrate Convocation and Reunions in October 2022. Be on the lookout for email and website updates from the Office of Alumni Engagement & Development in the weeks and months ahead. In addition to the events scheduled for all returning classes, there will be special activities of particular interest to our class. Please see our Class of 1971 web page for current details: <http://divinity.yale.edu/alumni/convocation-and-reunions>

In recent years, other 50th Reunions have included speakers, class gatherings and a Class Memorial Service. The 50th Reunion is a particularly special milestone, so whether it's been five years or fifty years since you were last on campus, we hope you will join your classmates on the Quad to celebrate.

# Yale

## Divinity School Reunion Giving

### *Instructions for Specific Types of Gifts*

For each of the types of gifts described below, please be sure to indicate the specific purpose which you intend to support (i.e. YDS Annual Fund, YDS Class Scholarship Funds, etc.).

#### *Wire Transfer*

In addition to cash gifts via check or credit card, Yale Divinity School also accepts gifts via wire transfer. For more information, please contact Emily Reid, Program Coordinator for Alumni Engagement and Annual Giving (direct phone: 203.432.5359; email: [emily.reid@yale.edu](mailto:emily.reid@yale.edu)).

#### *Matching Gifts*

Many employers give generously to educational institutions by matching charitable contributions made by their employees. In some cases, your spouse's company may match your gift. To find out if your company or your spouse's company, has a matching gift policy, visit [www.matchinggifts.com/yale](http://www.matchinggifts.com/yale)

If your company is eligible, request a matching gift form from your employer, and send it completed and signed with your gift. We will do the rest. The impact of your gift to our organization may be doubled or possibly tripled! Some companies match gifts made by retirees and/or spouses.

#### *Gifts of Marketable Securities*

A gift of appreciated securities that you have held for more than one year is frequently the most economical way to give. You may be eligible to take a federal income tax deduction equal to the fair market value of the stock on the date of the gift for up to 30 percent of your adjusted gross income and may not have to recognize the appreciation as capital gain. Following is specific information about how to give securities or mutual fund shares to YDS:

##### *Securities held by your bank or broker*

Please notify your bank or broker that you are making a gift of securities to Yale Divinity School and instruct your bank or broker to either phone Donated Securities at 203.432.4107 or e-mail [donated.securities@yale.edu](mailto:donated.securities@yale.edu) for instructions. Please tell your bank or broker not to proceed until speaking with a representative in Yale University's Donated Securities office.

##### *Securities held by you*

Please contact a member of our Donated Securities Department @203.432.4107 or e-mail [donated.securities@yale.edu](mailto:donated.securities@yale.edu).

*Mutual fund shares*

Please contact a member of our Donated Securities Department @203.432.4107 or e-mail [donated.securities@yale.edu](mailto:donated.securities@yale.edu).

*Excise tax on donated securities*

As of July 1, 2018, the Tax Cuts and Jobs Act of 2017 imposes on Yale, and a limited number of other colleges and universities, a 1.4 percent excise tax on the difference between a donor's tax basis (typically the original purchase price) in donated securities and the net proceeds received when Yale sells those securities. To assist in calculating Yale's tax liability arising from this new tax, we may be asking donors for information about their tax basis in securities they donate. Any information that donors can provide will be appreciated greatly and will help to reduce the effect of the excise tax.

*Yale's Federal Tax Identification Number: 06-0646973*



# Yale

## Divinity School 1971 50<sup>th</sup> Reunion

### *Planned Giving*

As you think about your 50th Reunion gift, we encourage you to explore planned giving. We know that planned giving be new to many of you and daunting. Yale's staff is available to explain options, so the decision-making doesn't have to be complex. A planned gift can help you support the Divinity School and our class's reunion gift now, but keep your assets until later.

**Yale University's Office of Planned Giving** offers many planned giving options. For your information and consideration, we have included a brief description of the options below, as well as additional enclosures with more detailed information about bequest intentions and IRA Rollover gifts. Additional information is also available on their website: <https://forhumanity.yale.edu/how-to-give/planned-giving-bequests>.

**Bequests:** Include a bequest to Yale Divinity School in your will or living trust of cash, a specific asset, or a percentage of your estate. You may receive an estate tax deduction for the full amount of your bequest while maintaining assets during your lifetime. Or, name YDS as a beneficiary of your IRA and, in many cases, receive partial reunion credit for your bequest. Please see the enclosed documents about bequest intentions for more information.

**IRA Charitable Rollover, also known as "Qualified Charitable Distribution:"** Make charitable gifts directly from Individual Retirement Accounts. If you are age 70½ or older, you can make annual distributions of up to \$100,000 to charities such as YDS – tax free. If you are 72 or older, and obligated to take a required minimum distribution (RMD), these gifts can count against that RMD. For more information, visit: <https://forhumanity.yale.edu/how-to-give/planned-giving-bequests>.

**Charitable Gift Annuities:** Make a gift of \$10,000 or more and receive annuity payments for life for yourself or for other beneficiaries and a charitable deduction now. An immediate annuity for a 71-year-old yields a 4.5% annuity rate. Or, postpone the receipt of fixed payments and receive a higher rate: deferring payments 5 years secures a 7.5% annuity rate. (Your actual benefits may vary depending on age and the timing of the gift.)

**Charitable Remainder Unitrusts:** Establish a unitrust to provide income for yourself or for other beneficiaries; receive a substantial charitable deduction. The trust pays a percentage of principal, revalued annually, for lifetime or period of years. In many cases, Yale will serve as trustee, offering skilled management and low administrative fees under the guidance of the Yale Investments Office.

**Gifts of Other Assets:** Donate closely held or other non-publicly traded stock, interests in limited partnerships, or limited liability companies; earn tax advantages and other financial benefits. You may also receive tax benefits for gifts of real estate, art, books or other collection-quality items.

For more information on planned giving opportunities, please contact Yale's Office of Planned Giving at [development.plannedgiving@yale.edu](mailto:development.plannedgiving@yale.edu), by phone at 800.445.6086, or by website at <https://forhumanity.yale.edu/how-to-give/planned-giving-bequests>.