Win-Win for the Class of 1964 and Hamilton

The Class of 1964 announced a total 50th reunion gift of $7,221,253 during the annual meeting of the Alumni Association in the Chapel during Reunions 2014. Annual Fund gifts, capital gifts, life payment gifts — charitable gift annuities and charitable remainder trusts — and, for the first time, estate plan provisions also were counted. Due to its success, the Class of 1964 won the Kayle Cup — awarded annually to the class that records the highest percentage increase of estate plan intentions and planned gifts.

Please send information about life payment gifts at Hamilton.

Specifically:
- charitable gift annuities
- charitable remainder unitrusts

Name ____________________________________________ Class ______
Address ___________________________________________
Telephone ___________________________ Email Address ___________________________

Hamilton Plans

www.hamilton.edu/PlanningYourGift

Recognizing the Importance of Hamilton in Our Lives

Your Fall 2014 Issue

Hamilton Plans

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To benefit you and the College

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To benefit you and the College
“We have the comfort of knowing we have made a lasting contribution to Hamilton.”

A dedicated volunteer for more than 40 years who chaired the Annual Fund and Planned Giving, Milt Walters teamed with Class of 1964 leaders Tom Slaight, Art Massolo and Denny Terrell to encourage their classmates to consider planned gifts, including charitable gift annuities.

In Milt’s words

My Hamilton education helped provide a framework for addressing issues, by teaching me thoughtful consideration and problem solving. All of those skills contributed to my career in investment banking and finance and civic activities. Probably most important was developing the courage and conviction to ask questions.

Carrie and I were high-school sweethearts, and she was a frequent and well-known visitor to the Hill. An added connection, one of our three children also attended Hamilton, graduating in 1988. Carrie and I felt it was important to recognize the significance of the College in our lives and the lasting friendships we established, so as my milestone 50th reunion started to lurk in our thoughts, we decided to set the stage for our class reunion contributions have been one-life gifts alternating between Carrie and me.

Eventually the remaining value will be added to the Class of 1964 Internship Fund. We recognize that, in today’s workplace environment, internships help Hamilton students gain meaningful employment following graduation, and we are happy that we can contribute to the future success of other Hamilton alumni.

Capture Your Gains in a Tax-Efficient Way

Hamilton donors have used charitable contributions to make investment shifts in a tax-wise way. Several simple strategies may allow you to provide for the College and:

- Lock-in the current value of securities
- Diversify or re-balance your portfolio
- Increase your cost basis
- Avoid recognition of forced gain
- Receive quarterly payments with charitable gift annuities

Donors have found that life payment gifts can capture the value of appreciated assets and supplement retirement income. A charitable gift annuity with Hamilton will make payments to you during your lifetime, beginning immediately or deferred one or more years (see chart below), with the remaining amount designated for the gift purpose of your choice. The charitable deduction and payment amount depend on the number and ages of the beneficiaries.

<table>
<thead>
<tr>
<th>DONOR AGE</th>
<th>PAYMENT PERCENTAGE</th>
<th>50</th>
<th>62</th>
<th>72</th>
<th>82</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
<td>Deferred until age 65 – 7.1%*</td>
<td>4.5%*</td>
<td>5.4%*</td>
<td>7.2%*</td>
<td></td>
</tr>
</tbody>
</table>

* Your effective rate of return will be higher when you consider the tax-free return of principal and associated income and capital gains tax savings.

Please return the reply card or call Ben Madonia ’74 at 866-729-0317 to request sample calculations that demonstrate the benefits of life payment gifts.