



GIFT OPTIONS FOR ALPHA GAMMA – AGR ALUMNI

This is a guide to Alpha Gamma Rho – Alpha Gamma Alumni who wish to make gifts to the Campaign for Excellence Fund.

CASH GIFTS:

Checks shall be made payable to Education Foundation of Alpha Gamma Rho (tax-deductible) or to the Alpha Gamma House Association (non-tax-deductible). All gifts paid by check shall be accepted by Alpha Gamma Rho.

PLEDGES:

Alumni donors must complete a pledge form or confirm the pledge in writing. Pledges may be payable in single or multiple installments and may extend for five years.

PUBLICLY TRADED SECURITIES

Readily marketable securities, such as those traded on a U.S. stock exchange, will be accepted by AGR and we will sell such securities upon receipt. To minimize transfer costs, contact AGR-Alpha Gamma before transferring the stock and DO NOT sell the stock or you may lose some tax advantages.

CLOSELY HELD SECURITIES

Non-publicly traded securities may be accepted by Alpha Gamma Rho after review.

REAL ESTATE

We will accept gifts of real estate.

LIFE INSURANCE

We will accept whole life insurance policies when AGR is named owner and beneficiary of the policy. (Note: For IRS purposes, the donor's charitable income tax deduction may be different; AGR does not provide legal or tax advice and donor is advised to seek their own legal council as to the extent a gift may be deductible).

TANGIBLE PERSONAL PROPERTY

Gifts of jewelry, artwork, collections, and equipment, shall be accepted after approval by AGR.

DEFERRED GIFTS

We will accept all of the following deferred gifts with prior approval:

Charitable Gift Annuities

Deferred Gift Annuities

Charitable Remainder Trusts

Bequests/Wills