

# INVEST IN THE FUTURE

Coe College encourages you to help build upon our accomplishments through membership in the Heritage Club. A planned gift can make a significant difference in helping us achieve success for our future students. We will work with you to ensure the gift you make will meet your personal and philanthropic goals.

To learn more visit our website at [coelegacy.org](http://coelegacy.org) or contact our gift planning office.

**Debbie Green**  
dgreen@coe.edu | 319.399.8592

**Megan Ruffles**  
mruffles@coe.edu | 319.399.8612

## WAYS TO GIVE THROUGH PLANNED GIVING

### WILL BEQUEST

Charitable bequests are an ideal way to ensure once your family is provided for, you can establish a larger charitable objective and meaningful legacy for Coe College, and you can designate how you want Coe to use your gift. A bequest also is one of the easiest gifts you can make.

### BENEFICIARY DESIGNATIONS

Name Coe as the beneficiary of a retirement plan (such as an IRA, 401(k) plan or company pension plan) or of a life insurance policy. Simply file a change-of-beneficiary form with your plan administrator or insurance company. You can even indicate a particular purpose for your gift in your beneficiary designation.

### CHARITABLE GIFT ANNUITIES

A charitable gift annuity is a simple contract between you and Coe College in which you make a gift of cash or property to Coe in exchange for our promise to pay a guaranteed, fixed sum each year for life to one or two annuitants named by you. Payments are based on age of the annuitant(s) and rates recommended by the American Council on Gift Annuities (ACGA).

### CHARITABLE REMAINDER TRUSTS

A charitable remainder trust is created when you place assets into an irrevocable tax-exempt trust and name a trustee. The trust can sell the assets and invest the proceeds to pay an income to you or other beneficiaries you select for life or for a set term of years. When the trust ends the remaining assets are used by Coe for the purpose you designate.

### CHARITABLE LEAD TRUSTS

A charitable lead trust is funded with cash or property and makes payments to Coe College for a number of years, then distributes the trust property to your family.

### LIFE INSURANCE

Gifts of life insurance may be made to Coe with either an existing policy or a new policy. Simply contact your insurance company and fill out the proper change of ownership form, designating Coe College as the new owner. Or, simply name Coe as the beneficiary.

### LIFE ESTATE RETAINED

You can execute a deed transferring your home or farm to Coe. In the deed, you retain a "life estate" that grants you the right to use the home or farm for life. At the time of the gift, you and Coe enter into a Maintenance, Insurance and Taxes (MIT) agreement.

# THE HERITAGE CLUB

CREATING A BRIGHTER FUTURE



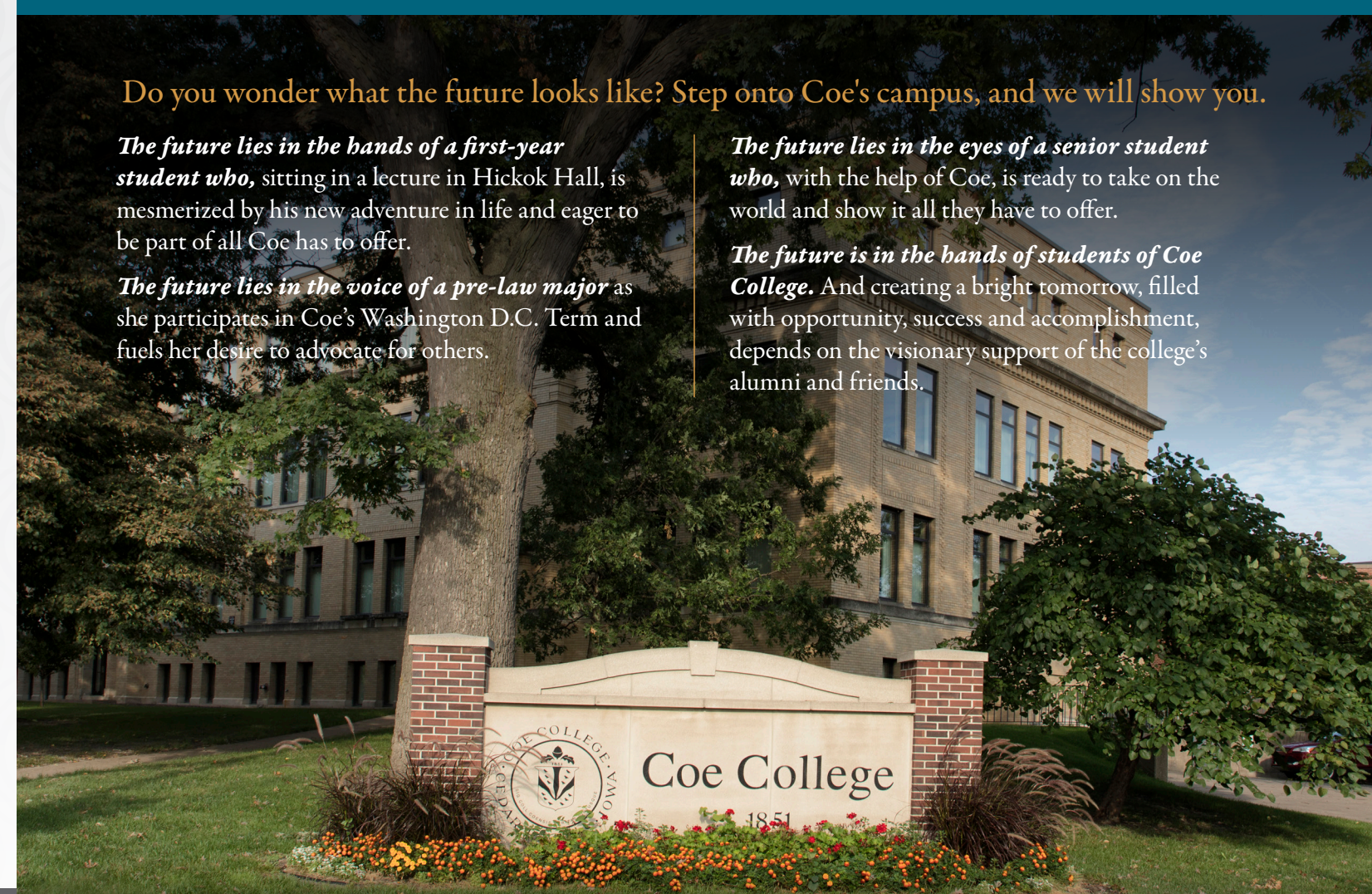
Do you wonder what the future looks like? Step onto Coe's campus, and we will show you.

*The future lies in the hands of a first-year student who*, sitting in a lecture in Hickok Hall, is mesmerized by his new adventure in life and eager to be part of all Coe has to offer.

*The future lies in the voice of a pre-law major* as she participates in Coe's Washington D.C. Term and fuels her desire to advocate for others.

*The future lies in the eyes of a senior student who*, with the help of Coe, is ready to take on the world and show it all they have to offer.

*The future is in the hands of students of Coe College.* And creating a bright tomorrow, filled with opportunity, success and accomplishment, depends on the visionary support of the college's alumni and friends.



[www.coelegacy.org](http://www.coelegacy.org)  
1220 First Ave. NE | Cedar Rapids, IA 52402 | 319.399.8592

[www.coelegacy.org](http://www.coelegacy.org)  
1220 First Ave. NE | Cedar Rapids, IA 52402 | 319.399.8592



# TRANSFORMING THE FUTURE BEGINS HERE

COE COLLEGE IS THE SOLEMN COMPACT BETWEEN  
THOSE WHO HAVE GONE BEFORE, OURSELVES AND  
THOSE WHO WILL COME AFTER US.

The Coe College Heritage Club was inspired by 11th President Joseph E. McCabe and exists to recognize and honor those who have committed to the long-term future of Coe College through a planned gift. On June 11, 1993, President McCabe delivered his “A Night to Remember” address to the charter members of the Heritage Club. He exclaimed, “*The future is ours if we have the vision to seize it.*”

Planned gifts provide future support to the college. Planned gifts of any size can be accomplished in many different ways including naming Coe in your will or trust, naming Coe as

beneficiary on a retirement account or life insurance policy or giving us a qualified life insurance policy. Planned gifts that pay you income for life, such as charitable gift annuities or charitable remainder trusts, also make you eligible for membership in the Heritage Club.

Whatever your gift, know it is much more than a sum of money or other assets — it represents your values and priorities and a lifetime of hard work. And always, these gifts enrich the educational opportunities for current and future students and provide the college with financial stability.

*If you have created a planned gift for Coe College,  
we would like to take this opportunity to thank you.*

## COE’S HERITAGE

Coe College received new life and was raised to a higher level when Daniel Coe, a farmer from the state of New York, generously gave money for a collegiate institute he would never see. Inspired by the preaching of the Rev. Williston Jones, Mr. Coe wanted to shape and share the school’s

vision to become an innovative educational institution of great significance.

Since that forward-looking gift in the 1800s, many other Coe College benefactors have come forward to invest in what is yet to come. Bequests, trusts, annuities and other planned

gifts have been tremendously important to Coe in times of both great challenge and opportunity. Generous supporters have committed to the future of Coe College to help it continue to become the important school Daniel Coe believed possible.

## RECOGNITION YOU DESERVE FOR THE LEGACY YOU LEAVE

The purpose of the Heritage Club is to serve and recognize you. We want you to know how much we appreciate your decision to give and that by your action, you have made a commitment to the future just like Daniel Coe. Members provide the college with financial stability and help enrich the educational opportunities for current and future students. The knowledge that alumni and friends of Coe act to provide future support assures students and faculty that their work can continue at the highest levels.

## HOW TO BECOME A MEMBER

Membership in the Heritage Club is simple and easy, and there are no dues or other obligations. If you have made a planned gift of any kind and of any size to Coe College, then you are eligible for membership. All you have to do is let us know. We will work with you to make sure we understand your goals and intentions and make certain your gift is used in the way you intend. While we hope your generosity will inspire others, you can remain anonymous for recognition purposes if you choose.

## MEMBERSHIP BENEFITS

When you establish your legacy gift, you join a select group of individuals who have expressed an enduring commitment to Coe College. As such, you are invited to exclusive gatherings throughout the year, including the annual Heritage Club Dinner celebrated during Homecoming weekend.

You also receive a commemorative certificate and distinctive lapel pin recognizing the lasting bond of your philanthropic support. In addition, to honor your commitment and serve as an inspiration to others, a permanent plaque in the Alumni House lists all members of the Heritage Club.

Members also gain further insight into the mission through periodic communications to keep the membership informed of the college’s achievements, challenges and aspirations. Above all, you will have the certainty of knowing your gift will continue to enhance Coe’s tradition of excellence while providing for the future.

*A legacy gift says you believe in the future of Coe and is a way to thank the college for all it provided as you looked to the future.*



## BENEFITS OF TELLING US ABOUT YOUR PLANNED GIFT

We can honor you with membership in the Heritage Club.

Even anonymously, you set an example for others to follow.

We can follow your wishes, since we know what they are.

The greatest benefit, of course, is the satisfaction of knowing you have meaningfully contributed to the continued excellence of Coe College and have made an impact on the lives of our students.

