

NAFSA'S NEW CENTURY CIRCLE

DIAMOND ANNIVERSARY

# DIPLOMAT

CAMPAIGN 2006-2008



**NAFSA**

Association of  
International Educators



## NAFSA'S NEW CENTURY CIRCLE

IN 1948, A GROUP OF EDUCATORS MET TO FORMULATE A NATIONAL ASSOCIATION that would help faculty and administrators provide positive experiences—on and off campus—for a growing international student population. That meeting paved the way for nearly 60 years of education, training, and services to the field.

NOW IT IS YOUR  
TURN TO **INSURE**  
NAFSA'S FUTURE.

We must help the next generation of students obtain global competence to meet the needs of a world based on markets, trade, and—especially—international understanding.

As members of the oldest and largest professional development association that focuses on international education and exchange, we are recipients of a priceless array of training and networking opportunities. By pledging to the New Century Circle, you will be joining with other NAFSAns who are determined to strengthen and sustain our legacy for future generations of international educators.

*“NAFSA has been the heart of my professional growth from the very beginning, so it's only natural that NAFSA would someday benefit from the legacy it helped create and nurture.”*

—Ron Moffatt, San Diego State University

## THE NEW CENTURY CIRCLE IS A SPECIAL GROUP OF UNIQUELY DEDICATED NAFSA SUPPORTERS.

By participating in the New Century Circle through wills and other means of special giving, these NAFSA donors are extending their support for international education and exchange beyond their lifetimes—into a future where NAFSAs may have to be even more aggressive advocates for international students and scholars than we are today.

Building a planned giving program for NAFSA is important because our advocacy leadership role for maintaining access to international opportunities for a more diverse group of students must be a long-term national priority.

Membership in the New Century Circle is open to those who have made provision for future support of NAFSA in an estate plan or through another planned gift. *Funds are not expected at the time of the pledge. This is a deferred gift.* The New Century Circle was established to recognize and pay tribute to those benefactors and to celebrate their generosity, foresight, and stewardship of the association.

Supporters who make planned gifts to NAFSA enjoy special opportunities, such as invitation to the NCC Breakfast at NAFSA's annual conference. This event provides a unique networking opportunity for those who have remembered NAFSA in their future gift plans.

## IN 2008, NAFSA WILL CELEBRATE ITS 60TH ANNIVERSARY.

You can join the New Century Circle now as a Diamond Anniversary Diplomat. This special campaign began in January 2006 and will run through December 31, 2008.

Making a gift of this kind is a personal decision, one that requires careful thought and planning. You must, of course, provide for your family and loved ones. After doing so, please remember the role NAFSA has played in your life and the way that NAFSA represents your extended family around the world.

### HOW DO YOU GET STARTED?

Simple. This brochure describes how to plan gifts through one's estate or other financial plans and ways to give stock or other property now or in the future. Some gifts offer surprising benefits, such as increased income for life. Even if you already have a will, a codicil can be used to make a minor change in an existing will without the need to execute a new will.

# PLANNING YOUR GIFT

EVERYONE HAS A UNIQUE FAMILY AND FINANCIAL SITUATION. Your gift through the New Century Circle can be designed to match your personal circumstances.

Here are several options:

## REMEMBERING NAFSA IN YOUR WILL

Many NAFSA members and friends generously remember NAFSA in their wills. A will is a legal document directing how one's assets are to be distributed at death. Bequests are the most traditional way to provide important help for worthwhile causes. Each state has its own laws regarding the formalities necessary to execute a valid will.

Your bequest can be:

- ▶ a stated dollar amount
- ▶ a percentage of your estate
- ▶ specific property such as stocks or real estate
- ▶ after all other beneficiaries have received their bequests
- ▶ a combination gift arrangement by which your bequest can provide financial benefits to your family and later be used by NAFSA

Recommended bequest language: I hereby give and bequeath to NAFSA: Association of International Educators, a not-for-profit organization having its offices in Washington, DC \$\_\_\_\_\_.

## GIFTS OF SECURITIES

You may choose to benefit NAFSA through a gift of securities (stocks, bonds, etc.). Because of tax considerations, donors can often give more—at no greater cost to themselves—by giving securities. Mutual fund shares can also be given to NAFSA with the same beneficial effect as listed and actively traded stock.

While U.S. savings bonds are an excellent selection for a charitable gift, they cannot be left to NAFSA as a co-owner or through a beneficiary designation. You can leave other types of bonds to NAFSA.

You can name NAFSA as the direct beneficiary of all or part of your life insurance policy or as a co- or contingent beneficiary. In this way, you continue to be the owner of the policy. You can also donate your paid life insurance policy to NAFSA. Contact your life insurance company for more information. You can also name NAFSA as a beneficiary of an annuity.

## GIFTS OF RETIREMENT PLANS

You may designate NAFSA as the final beneficiary of a pension or profit-sharing plan or of a private fund such as an Individual Retirement Account (IRA) or Keogh Plan.

Your estate saves both income and estate taxes when you make a charity the beneficiary of your retirement plan. You can also arrange for lifetime income to be paid to a family member after your death, with NAFSA's benefit coming later.

IRAs represent a wide range of gift strategies. We recommend you consult a qualified legal or financial adviser to explore the flexibility involving IRA gifts.

## GIFTS OF BANK ACCOUNTS OR CERTIFICATES OF DEPOSIT

NAFSA can be included in your estate plan by naming NAFSA as the beneficiary of a bank account or Certificate of Deposit (CD). When you open a bank account or set up a CD, you can name NAFSA as a beneficiary by using the beneficiary designation form provided by the institution. Ask your bank for details.

## LIFE INCOME GIFTS

Many people are surprised to learn that it may be possible to plan a substantial gift to take effect later, while receiving periodic payments of income from the assets that will eventually come to NAFSA.

This is possible through a charitable remainder trust. A donor can make a gift now to a trust that pays to the donor or someone else either a fixed or variable income for some predetermined term of years or for life. When the trust period ends, the assets remaining in the trust pass to NAFSA.

*I believe we, as international educators, have more than jobs. We have missions. By their very nature, missions transcend individuals and are more long-lasting than any of us will see life on this earth. Pledging to the NCC can help ensure that our mission will go on for many generations to come. What's most important is what we leave behind.*

—Connie Perdreau, Ohio University

# MAKING YOUR PLANS

AS A MEMBER OF THE NEW CENTURY CIRCLE, there are various ways to designate your gift. You may direct the gift to:

- ▶ **Unrestricted/General Support.** This option provides the greatest degree of flexibility as none of us can tell what future needs may be. NAFSA's Board of Directors will allocate your gift to areas in need of support.
- ▶ **John F. Reichard Research Fund.** Your help is urgently needed to support worthy research in the field.
- ▶ **Professional Development.** Your gift will support new opportunities for international professional development and will expand opportunities available to all NAFSAns.
- ▶ **Endowment.** Gifts in this category will be placed into a restricted fund in which only the annual interest earnings will be available to support NAFSA programs.

*Please consider carefully the option that best suits your own situation as you plan for a special gift to NAFSA.*

There is a gift option to meet each person's unique circumstances. If you have a more specific purpose in mind, please contact Gail A. Hochhauser. Contact us about naming opportunities for special gifts and/or "In Honor Of" or "In Memory Of" gifts.

All correspondence to the New Century Circle will be held in strictest confidence. A request for information is not construed as an obligation to NAFSA.

NAFSA does not engage in rendering legal or tax advisory services. The purpose of this brochure is to provide information of general character only. NAFSA assumes no responsibility for tax planning based on materials in this brochure.

*Simply put, I owe NAFSA—and this is another form of down payment on my debt. Through the association I have gained knowledge and access to resources to perform my job better, professional development through working on the regional team and various committees. ... Equally important, I have had the opportunity to connect to many fascinating and talented individuals who have been sources of inspiration and encouragement in their roles as guides, mentors, and friends.*

—Nancy Young, New York University

# FREQUENTLY ASKED QUESTIONS

## WHAT IS PLANNED GIVING?

Planned giving combines financial planning, estate planning, and tax planning techniques to enable friends of NAFSA to make gifts of surprising significance—often with future dramatic tax advantages.

## DO I NEED TO GIVE MONEY NOW?

You do **not** have to give funds now. The New Century Circle is seeking **pledges**. There is no minimum amount required for your pledge and it is not necessary to tell us the amount you are pledging. Donors interested in other opportunities for member giving to NAFSA—including year-end tax-deductible gifts—are invited to contribute to NAFSA's Annual Fund program. More information on that program is available from Gail A. Hochhauser or on the Web at [www.nafsa.org/annualfund](http://www.nafsa.org/annualfund).

## WHAT ARE THE TAX IMPLICATIONS OF MY GIFT?

There are clear tax advantages on gifts to NAFSA through the New Century Circle. Planned gifts enable you to make a gift to NAFSA and reduce or possibly eliminate various income, federal, state, and estate taxes the year you make the gift (or the year the gift is transferred to NAFSA). We suggest you speak to a professional adviser. Attorneys, certified financial advisers, trust officers, insurance professionals, and others can help you structure a gift to NAFSA that will benefit you and your family, as well as NAFSA.

## I'M UNDER AGE 50. I THOUGHT PLANNED GIVING APPLIES ONLY TO OLDER FOLKS?

Planned giving today is divided evenly among a wide range of age groups. Almost 50 percent of bequest intentions come from individuals under age 55. And 11 percent of the American public say they have already earmarked money for charities in their wills or have created another type of planned gift.

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*I believe in our mission and a pledge to NCC is an investment in the future.*

—Michelle Stelljes, Baylor College of Medicine

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## PLANNED GIVING DONORS ARE USUALLY WEALTHY. I'M NOT. WHY ME?

Even modest estates today are larger than the average estates of past generations. You may not have considered such a gift because it seemed too complicated or limited only to the tax needs of wealthy individuals. Planned gifts, however, can be simple and can offer both tax advantages and the security of life income for a range of individual needs. More people are finding it possible to make charitable bequests and provide adequately for the needs of loved ones.

We encourage you to go through a financial planning process to identify your goals and determine what is needed to reach these goals. You may be surprised to discover that you have enough money to meet your goals and pledge funds to NAFSA's New Century Circle.

Remember, you do not have to pledge a minimum or fixed amount of money or specify the amount of your pledge to be a New Century Circle Diamond Anniversary Diplomat. No immediate funds are required to make a planned gift to NAFSA.

## CAN I ASSIGN MY CONTRIBUTION TO A SPECIFIC NAFSA PROGRAM?

Several programs are currently available. These include: Unrestricted/General Support; John F. Reichard Research Fund; Professional Development; Endowment. If you have a more specific purpose in mind, please contact Gail A. Hochhauser at NAFSA.

## I ALREADY HAVE A WILL. HOW DO I AMEND IT TO INCLUDE NAFSA?

You can amend a will to make a gift without rewriting the entire document. Your lawyer can prepare a codicil. This simple statement adds a new bequest to NAFSA while reaffirming the other terms of your will.

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*It is important to me that I pledge a lasting contribution to an organization that has given me so much. I especially want to share with the newer professionals the same opportunities I have had for professional development, building confidence and expertise, and making lasting friendships with colleagues in the field of international education.*

—Sandy Soohoo Rafeai, Linfield College

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# NAFSA'S NEW CENTURY CIRCLE DIAMOND ANNIVERSARY DIPLOMAT

## PLEDGE CARD

— PLEASE PRINT CLEARLY —

\_\_\_\_\_  
Name(s)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
ZIP

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
E-mail

I/(we) are pleased to accept membership in the New Century Circle with the following pledge:

**DESIGNATION:** *(please check one)*

- Unrestricted/General Support
- John F. Reichard Research Fund
- Professional Development
- Endowment

\$ \_\_\_\_\_

*Amount (optional)*

**METHOD OF TRANSFER:** *(please check one)*

- I have included NAFSA in my will
- Gift of securities    Gift through Insurance    Certificate of Deposit (CD)
- NAFSA as beneficiary in IRA or other retirement savings vehicle
- I have made other estate provisions for NAFSA *(please explain)*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- I/(we) wish my (our) name to appear in the NCC membership listing
- I/(we) wish to be an anonymous member of the NCC

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

If you have other instructions or a more specific purpose in mind, contact Gail A. Hochhauser at 1.202.737.3699, ext. 223 or e-mail [gailh@nafsa.org](mailto:gailh@nafsa.org). It is important that NAFSA understands and fulfills your specific wishes.

***Please enclose in an envelope and mail to:***

Gail A. Hochhauser, Senior Director  
Organizational Advancement  
NAFSA: Association of International Educators  
1307 New York Avenue, NW, 8th Floor  
Washington, DC 20005-4701

## BECOME A NEW CENTURY CIRCLE DIAMOND ANNIVERSARY DIPLOMAT

To join NAFSA's New Century Circle:

- ▶ Read this brochure carefully.
- ▶ Write or call the New Century Circle the NAFSA office with questions or comments. Information is also available at [www.nafsa/ncc](http://www.nafsa/ncc)
- ▶ Consult with a qualified legal or financial adviser regarding pledge options.
- ▶ When you are ready to pledge, fill out the attached New Century Circle Diamond Anniversary Diplomat pledge form, enclose in an envelope, and mail to Gail A. Hochhauser, NAFSA: Association of International Educators, 1307 New York Avenue, NW, 8th Floor, Washington, DC 20005.

**ALL INQUIRIES ARE CONFIDENTIAL.**

“  
*I believe so deeply in what NAFSA does to make a difference for people involved in international educational exchange that pledging towards its continuance makes sense to me.*  
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—Michael Smithee, Syracuse University



NAFSA: Association of International Educators  
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Washington, DC 20005  
202.737.3699  
[www.nafsa.org/ncc](http://www.nafsa.org/ncc)