



GEORGIA

Always

The Planned Giving Society of the University of Georgia Athletic Association



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What is GEORGIA *Always*?

VISION STATEMENT

The University of Georgia Athletic Association will aspire to be the nation's premier intercollegiate athletics program both academically and athletically, a model of excellence for others to emulate, while enhancing the lives of student-athletes and preparing them for life beyond athletics.

GEORGIA *Always* has been created to continue fulfilling the Athletic Association's vision. University of Georgia alumni and friends who are dedicated to the continued success of Georgia's student-athletes can make a lasting imprint on the program by giving to the Athletic Association through various avenues of planned giving.





GEORGIA *Always*

The Planned Giving Society of the University of Georgia Athletic Association

*Through the various avenues of planned giving, the University of Georgia Athletic Association has established GEORGIA *Always*, a society of Georgia alumni and friends who are dedicated to the continued success of Georgia's student-athletes and coaches. With the various ways alumni and friends can make a planned gift, generations of Georgia student-athletes will have the opportunity to proudly wear the Georgia "G" on their uniforms.*

As the costs to run a top Athletics Program continue to escalate, the Athletic Association is looking for ways to secure the future of the program. These future gifts will have a long-lasting positive effect on both the Athletic Association and you. Not only will you have the satisfaction of knowing that you will be helping with the long-term success of the Dawgs, but you will be allowed to receive tax advantages and other benefits with your gift. It is GEORGIA *Always's* mission to ensure that the Athletic Association can provide our student-athletes, in perpetuity, with the tools to compete academically and athletically at an elite national level. Your entrance into this exclusive giving society will connect you and your family to the Athletic Association, and will ensure GEORGIA *Always* will be on our mind.



GEORGIA *Always* stands for the finest quality student-athlete experience in the country. Whether it is on the field, in the classroom or in the community, the University of Georgia Athletic Association is committed to the betterment of our student-athletes.

GEORGIA *Always* believes in enhancing the lives of our student-athletes and preparing them for life beyond athletics.

GEORGIA *Always* raises the level of competition in both the Southeastern Conference and on the national scene. With a total of 125 SEC and 32 National Championship team titles, The University of Georgia Athletic Association believes in producing champions both on and off the field.

GEORGIA *Always* practices positive actions and decisions, which should better not only the Athletic Association, but also the student-athletes, coaches, staff, University community, friends and alumni.



DO YOU HAVE
GEORGIA *Always*
ON YOUR MIND?

THE ATHLETIC ASSOCIATION supports 21 varsity teams and over 500 student-athletes. The Athletic Association is not permitted, by state law, to receive any state or University dollars to support the budget. With a budget of over \$76 million, it is imperative to receive private support to meet our budgetary needs. GEORGIA *Always* is an avenue to assist in securing the future of the program.

The impact of these future gifts will have a positive effect on the program and the donor. This brochure will help guide you through the various planned gifts that help UGA Athletics and allow you to receive substantial tax advantages and other benefits.

Please make sure to consult your tax advisor or financial planner when committing to GEORGIA *Always*.

ESTATE GIFTS

BEQUESTS BY WILL

A bequest is a gift or legacy left in your will or living trust, typically personal property or assets. A living trust is a revocable trust established by a grantor during his or her lifetime in which the grantor transfers some or all of his or her property into the trust.

RETIREMENT PLAN GIFT

A retirement plan gift is a gift of part or all of an IRA or retirement plan account upon death. There are substantial tax benefits that are involved when it comes to retirement plan gifts and this option allows you to better control the distribution of your estate.



“Our experience with the Scholarship Endowment program is that the role of benefactor and beneficiary can get reversed. Our family has given some money, but we have received much more in return.

Because there are coaches like Head Women’s Tennis Coach, Jeff Wallace, as well as others, we have endowed two other scholarships through the Heritage Society.”

—DOYLE AND PAT MOTE
(WITH UGA TENNIS PLAYER KELLEY HYNDMAN)



“We support many causes, but appreciated the program that Coach Vince Dooley established and what Damon (Evans) is doing to continue it. We should support athletics to help Georgia maintain its edge. If we can help our favorite team keep pace with the competition, we are delighted. We would like to think that knowledge of our gift might stimulate others to join the team and contribute to the Bulldog cause.”

—JOHN AND ALICE SANDS



LIFE INSURANCE GIFT

A gift of ownership of a life insurance policy to the University of Georgia Athletic Association. Life insurance is an especially flexible plan that can offer a convenient way to fund meaningful charitable gifts.

THERE ARE SEVEN WAYS TO GIVE USING LIFE INSURANCE:

1. Name UGAA as beneficiary of a policy you own.
2. Purchase a new policy—this can make a substantial gift in an affordable and tax-efficient manner.
3. Give a paid-up policy you already own by changing the owner and beneficiary.
4. Give a policy on which you are still paying premiums—this allows you to deduct each future premium payment and the approximate cash value of the gift.
5. Buy a policy benefiting your heirs to replace money or property you have given.
6. Purchase a life insurance on the life of another person.
7. Assign policy dividends to UGAA.

PARTNERSHIP GIFTS

CHARITABLE REMAINDER TRUST

A Charitable Remainder Trust is a type of trust that pays one or more beneficiaries a fixed amount, typically for life, then the balance to the University of Georgia. As the donor, you transfer property (cash and/or other assets) to a trust that is created under the laws of your state. Payments are made from the trust to you and/or one or more other persons for life or a period up to 20 years. At the end of the trust period, the property remaining in the trust becomes UGAA's.

THERE ARE TWO TYPES OF CHARITABLE REMAINDER TRUSTS:

- 1) **Annuity** – if you prefer a fixed, unchanging income.
- 2) **Unitrust** – if you prefer payments that fluctuate with the value of assets or the earnings of your trust.

CHARITABLE GIFT ANNUITY

A Charitable Gift Annuity is typically an agreement in which you transfer cash or other assets to the University of Georgia in exchange for its promise to pay you an annuity for life.

“I have been very fortunate during my life. I believe in sharing with others. I believe education is so very important for young people. I like sports, so the best of things is to share with student-athletes and have the thrill of attending the competition of UGA sporting events. UGA student-athletes are getting the opportunity to be educated while enjoying their sport. There is also another advantage for me—using the contributions to reduce income tax/estate tax.”

—JULIA MORGAN





Steven Farmer
Director of Capital
Support
farmer@sports.uga.edu
706-583-0257



Carolyn Center
Director of Development
ccenter@sports.uga.edu
706-583-5492



Mike Cavan
Major Gifts Officer
gadawgs@sports.uga.edu
706-542-8698



Jay Lowe
Major Gifts Officer
jlowe@sports.uga.edu
706-542-7812

CHARITABLE LEAD TRUST

A Charitable Lead Trust is a type of trust that pays income to the University of Georgia, typically for a set number of years. Then the trust remainder is payable to the grantor or his or her family. There are significant advantages to this model if you are looking to give money to heirs and dramatically decrease the amount of estate tax required.

POOLED INCOME FUND

A Pooled Income Fund is an agreement in which you give cash or other assets in exchange for a variable income payable for life, then the balance to our organization.

RETAINED LIFE ESTATE

A Retained Life Estate is an agreement where you give the Athletic Association your home, but you and your spouse can continue to live in it for life. You will receive a sizable tax benefit by deeding your home to us now.

BENEFITS TO PARTICIPANTS IN GEORGIA *Always*

- Listing in Annual Report and media guides
- Invitation to annual pre-season kick-off party in Athens
- Georgia Always Gear

BENEFITS TO MEMBERSHIP IN THE UNIVERSITY OF GEORGIA'S HERITAGE SOCIETY

- Your name will be listed annually in University publications
- You will be invited to University Special Events
- Membership lapel pin
- Membership certificate suitable for framing



University of Georgia Athletic Association • P.O. Box 1472 • Athens, GA 30603 • georgiadogs.com