



PLANNED GIVING OPPORTUNITIES

BEQUEST INTENTIONS

CHARITABLE GIFT ANNUITIES

CHARITABLE REMAINDER TRUSTS

GIFTS OF SECURITIES

GIFTS OF RETIREMENT ASSETS
(401, IRA, etc.)

GIFTS OF LIFE INSURANCE

GIFTS OF REAL ESTATE

PLANNED GIVING AT SIMMONS

As we imagine Simmons 100 years from now, our strength will come from the planning and vision of our leadership combined with the support of our alumnae/i and friends. With thoughtful planning of your own, your gift to Simmons will have long-term impact on Simmons's future while meeting your near-term personal financial goals.

Planned gifts are a key part of the life of the College. In fact, the College was founded by a planned gift from the estate of John Simmons. Certain types of planned gifts can help you create income and realize significant tax benefits for you or your loved ones. Often, they are arranged during our lifetime—for example, in a will—and completed when we have passed away. But planned gifts are not only about the future. As many who have made a planned gift for Simmons will tell you, they are also about our hopes and dreams today.

10 FACTS ABOUT PLANNED GIVING

1. Planned giving can offer creative ways for you to maximize your giving to Simmons.
2. You may be able to make a significantly larger gift to Simmons through a planned gift than you would through an outright gift of cash.
3. Certain types of planned gifts can provide you, and your spouse if desired, a guaranteed income stream for your lifetimes, secured by the assets of Simmons.
4. Through some planned gift arrangements, you can provide for your family members as part of your estate planning and at the same time make a charitable gift to Simmons.
5. Planned gifts made through your trust or will, or through your retirement accounts, do not require minimum age or dollar amounts, and they can have a significant impact at Simmons.
6. Establishing Simmons as a beneficiary of your retirement assets, such as 401(k) and IRA accounts, can be an effective way to make a substantial gift to Simmons without depleting lifetime assets.
7. Through gifts of appreciated securities, you may be able to reduce or eliminate capital gains tax liability, resulting in a larger gift to Simmons, and transform potentially low-yielding assets into a steady stream of income.
8. Planned gifts receive gift credit and in some cases Simmons may be able to include these planned gifts in fund-raising totals.
9. Planned giving offers ways for you to reduce or limit your exposure to income tax, capital gains tax, gift tax and/or estate tax.
10. All donors who inform us that they have made a planned gift to Simmons are invited to join the John Simmons Society, a vibrant community of over 500 supporters committed to helping Simmons students achieve their full potential.



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simmons.edu/makingeducationwork

GIVING OPPORTUNITIES

FACULTY ENDOWMENTS

Faculty Chairs

Prestigious College-wide Chair—**\$5 million**

Professorship—**\$3 million**

Associate Professorship—**\$1.5 million**

STUDENT FINANCIAL AID

Endowed Scholarships and Fellowships

\$1 million—Named Scholarship Fund. Provides tuition assistance to a cohort of named scholars.

\$100,000—Minimum endowment to provide a stewarded named fund for financial assistance to an undergraduate or graduate student based on need and/or merit.

Simmons Fund Scholars

Donors who commit to The Simmons Fund gifts of at least **\$10,000** a year for five years will receive a student scholar.

ACADEMIC CENTERS AND PROGRAMS

Endowments

Opportunities exist at various levels to create endowment to support specific positions and initiatives within centers (e.g. directorships, fellowships), such as the Center for Excellence in Teaching.

\$2.5 million will endow a directorship.

\$100,000 is the minimum endowment to name a fund in support of programs/research.

CURRENT-USE GIFTS: THE SIMMONS FUND

Spendable gifts may be made in any amount to The Simmons Fund. The Simmons Fund supports scholarship assistance, faculty research, internship stipends, student activities, and physical-plant enhancements. Unrestricted gifts allow Simmons to target funds strategically to meet the evolving needs of our students and innovative academic programs.

CAMPUS AND BUILDINGS

Campus Endowment

\$100,000 to endow and name a fund in support of maintenance and improvement of the physical plant.

EXPENDABLE CAPITAL GIFTS

Multi-year commitments of **\$250,000** or more would allow for the naming and enhancement of campus facilities such as:

The Quad (**\$3 million**)

The College Center (**\$2 million**)

The Fens Café (**\$2 million**)

Campus buildings, classrooms, foyers, and meeting spaces (**\$250,000–\$3 million**)

DONOR PROFILE



DONOR: CATHERINE SANTOS WILSON '69

“I chose to include Simmons in my estate plans because I want to help make available to other women the wonderful education and resultant

opportunities that Simmons has provided for me. The education and extra-curricular experiences that I received at Simmons gave me the foundation and confidence to achieve my career plans and goals and now to be in a position to ‘give back.’

“Simmons is a unique college. Over the last 40-plus years since I graduated, it has evolved in a positive manner, grown academically and in reputation, and achieved many honors. I believe that, by financially supporting Simmons, I can, if only in a small way, help the College to continue to be a strong and vital force in academics and society in general. Ensuring that Simmons remains strong not only preserves the value of the education all of us have received, but also ensures that future generations of women will benefit as well.”

DONOR PROFILE



ELIZABETH “LIBBY” WARREN BACKOFEN '46 HAS A PLAN

Retired Scientist’s Gift will Support Science Education at Simmons. Elizabeth “Libby” Warren Backofen '46 is passionate about science. “Science

is the future of civilization,” says Backofen, adding, “Everyone should know the Periodic Table.”

Backofen is also passionate about Simmons. So when it was time to plan for her estate, she decided to leave it all to the College and stipulated that her gift be used to establish an endowed chair or scholarship in biology, chemistry, physics, or mathematics. In that way, her planned gift to the Making Education Work Campaign will ultimately support a top Strategy 2015 priority: further strengthening the undergraduate College.

“I want the money to do some good, and I know that will happen at Simmons,” says Backofen. Planned-giving staff at the College helped her arrange a more-than \$200,000 gift annuity and formalize the provision for Simmons in her will. Backofen is pleased her gifts to the College will help generations of aspiring scientists prepare for life’s work just as she did.

FOR MORE INFORMATION ABOUT INCLUDING SIMMONS COLLEGE IN YOUR ESTATE PLANS, CONTACT:

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OFFICE OF ADVANCEMENT

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