

Please complete the optional information to help the College plan for the future.

I/We are pleased to acknowledge that I/we have named the DCC Foundation as a beneficiary in my/our:

Will/Living Trust (Attorney)

Retirement Plan (type)

Charitable Remainder Trust (held by)

Life Insurance Policy (Insurance company/Contact)

Other

Documentation provided:

- Copy of relevant estate documents or beneficiary designation
- Letter from attorney or financial advisor
- This form serves as documentation for our commitment

My/our gift to the Foundation is:

- Unrestricted
- Designated specifically for:

Undecided—please contact me to discuss.

James F. Hall

LEGACY SOCIETY

The James F. Hall Legacy Society was created to recognize donors who have generously promised gifts to the DCC Foundation through wills, trusts, and other life-income vehicles. By becoming a member, you're showing your belief in the DCC of today — and tomorrow.

James F. Hall was DCC's first president when it was founded in 1957—with only 13 faculty members and 250 students. By 1970, President Hall had grown the campus to 150 faculty members and four times its enrollment. Today, DCC is the premier community college in the region. Our tuition is the most affordable of any college or university in the state, and our educational reputation is one of the best.

President Hall was an avid supporter of public higher education, even in his retirement. He passed away in 2018, but his spirit lives on through the Hall Legacy Society, which allows DCC to offer programs and opportunities which will benefit students for decades to come.

All who join the James F. Hall Legacy Society play a vital role in supporting that excellence. The DCC Foundation receives and manages legacy gifts and ensures that member wishes are honored. Legacy gifts are vital to funding many programs and scholarships which help students access the financial, educational and personal help they may need to succeed, thus honoring the passion and commitment of Dr. Hall. Members understand the importance of sustaining the College for future generations by becoming part of this continuing story of educational excellence. You are invited to become a part of this legacy.

Establishing and endowing the James F. Hall Legacy Society was a perfect way to honor our Founding President. He was guided every day by his deep belief that open access to education for all was essential to our democracy. This remains at the heart of DCC today.

June Pierson

FOUNDING MEMBER,
JAMES F. HALL
LEGACY SOCIETY

ESTATE PLANNING GUIDE

We offer a free estate planning guide to help you consider the many ways you can maximize your philanthropic goals while ensuring your family/beneficiaries are provided for as well. Visit sunydutchess.giftlegacy.com to request one.

LEARN MORE

The DCC Foundation brings together alumni, donors and friends to support the College's mission of preparing students to fully realize their potential and make a positive contribution to their community. To discuss how you can maximize the impacts of your generosity at DCC, please contact our Foundation at **(845) 431-8403**.

DUTCHESS
COMMUNITY COLLEGE
FOUNDATION

53 Pendell Road | Poughkeepsie, NY 12601
sunydutchess.edu/foundation

LEAVE a LEGACY



**What
will
yours
be?**

DUTCHESS
COMMUNITY COLLEGE
FOUNDATION





Make your name synonymous with student enrichment.

DEFINE YOUR LEGACY

Your gift may be directed in one of the following ways:

UNRESTRICTED

Your gift is used for DCC's areas of greatest need.

RESTRICTED

You can direct your gift to a program or scholarship of your choice—or one which you create—but is limited to the amount of that gift and is awarded over time. (Minimum investment: \$5,000.)

ENDOWMENT

You can also direct an endowed gift to a program or scholarship of your choice or creation. An endowment is a gift designed to last forever. It continues growing over time by generating investment income at a predicted rate of return, allowing the gift to produce scholarships or other support in perpetuity. It can also be named after you—or in honor of family, friends, or a major influence in your life, so that they, too, live on for generations to discover. (Minimum investment: \$15,000.)

CREATING a LEGACY IS EASY

Two easy estate planning strategies that can benefit you and support DCC students are:

WILLS AND BEQUESTS

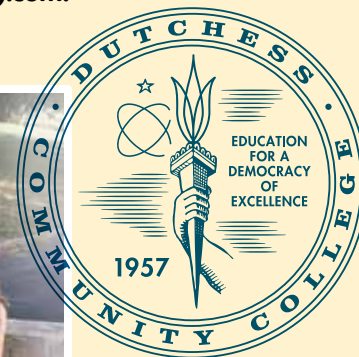
The most common bequests are gifts made through a provision in a will or trust. You can make a bequest of a dollar amount, a specific asset, or a percentage of your estate. A key advantage to bequests is that they are made through your estate plan, but can still be adjusted if needed.

Creating your own plan is easy with DCC's Estate Planning Guide. You can organize your family and estate information in this helpful workbook—and we're always willing to help! To get started, just visit sunydutchedu/estateplanning.

BENEFICIARY DESIGNATIONS

In addition to "traditional" bequests through your will or trust, you can use beneficiary designations to create your legacy. Easily make a gift by completing a beneficiary designation form provided by your account administrator. The most common are available for bank accounts, life insurance policies and investment accounts—e.g., 401(k)s, IRAs, etc.

The benefits of this approach are numerous, including tax savings, avoiding the probate process, the overall ease to establish, and its revocability if your circumstances should change. To learn more, visit sunydutchedu.giftlegacy.com.



Please complete the following information to be added as a member of the James F. Hall Legacy Society.

NAME _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____

EMAIL _____

DATE OF BIRTH _____

As evidence of my/our desire to provide a legacy of support to the Dutchess Community College Foundation,

- I/We hereby inform you that we have made a provision for DCC in our estate plans.
- I/We understand that this commitment is revocable and can be modified by me/us at any time.

- In any donor recognition materials, I/We wish to be referred to as:
- _____
- _____

- Include my spouse as a James F. Hall Legacy Society member and in recognition materials.
- I/We prefer to remain anonymous and do not wish to be recognized publicly at this time.

The estimated value of my gift is:

- \$ _____
- _____ % of my estate, currently valued at \$ _____
- _____ % of my retirement plan/life insurance, currently valued at \$ _____
- Securities Transfer*

NAME OF SECURITY _____

NUMBER OF SHARES _____

DONOR SIGNATURE _____ DATE _____

DONOR SIGNATURE _____ DATE _____

* Dutchess Community College Foundation Securities Transfer Information

OUR BROKERAGE FIRM

Ameriprise Financial
Seven Bridges Wealth Advisors
176 Church St.
Poughkeepsie, NY 12601-4165
(845) 454-3021

DTC: 0756
Account: 36581654
EIN: 22-2484101