At The Ohio State University we rely on gifts from friends like you to meet the needs of our students, put a quality education within their reach and provide our patients with life-saving care.

But what about the future? Though we have accomplished a lot, there is still much left for us to do. Legacy gifts help us get there.

When you make a legacy gift to The Ohio State University Foundation, you:

- Provide us with solid financial footing.
- Help us plan for the future with confidence.
- Ensure we can adjust our offerings to meet the changing needs of our students, faculty, researchers and patients.

There are several ways you can make a legacy gift, many of which offer you benefits in return. Some popular gifts include:

- **Giving a gift in your will or living trust.** This gift costs you nothing today and is easy to change as needed.

- **Naming The Ohio State University Foundation as a beneficiary of your retirement plan assets.** A simple form is all that is needed to make this gift.

- **Donating appreciated stock.** When you give stock that is worth more now than when you bought it, you can avoid capital gains tax.

- **Establishing a life income gift.** Give a gift and receive steady income in return. You may even qualify for an income tax charitable deduction in the year you make your gift.
About the New Retirement Plan Laws

Effective Jan. 1, 2020, the Setting Every Community Up for Retirement Enhancement (SECURE) Act brought some of the most significant changes to retirement plans since 2006. Continue reading to the right for how you may be impacted.

Contact your financial advisor for more information on how the SECURE Act may impact you.

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THE OHIO STATE UNIVERSITY

More than 16,000 undergraduate students receive up to $2,250 from the President’s Affordability Grant each year.

Ohio State ranks third among U.S. flagship universities for efforts to control in-state tuition over the last decade (Chronicle of Higher Education).

“
We need prepared educators for future generations, and we hope our financial support allows scholarship recipients to achieve this and go out and help others learn.”
—LINDA (AND CHARLIE) KURTZ

BLEND YOUR GIVING, MAKE A BIGGER IMPACT

You can make a difference at Ohio State both today and tomorrow. How? By combining a current gift with one for the future. This type of giving, called blended giving, allows you to make an even bigger impact than you thought possible.

Making a blended gift is easier than you think. Simply choose a gift that works for you today and pair it with one for the future.
THREE CHANGES THAT MAY IMPACT YOU:

1. **You can contribute to your IRA longer.** You can now continue to contribute to your IRA past the age of 70½, allowing you more time to save.

2. **The required minimum distribution (RMD) age changed.** The SECURE Act changed the age at which you must start taking RMDs from your retirement account from 70½ to 72 for those who were born July 1, 1949, or later. This change gives your account additional time to grow.

3. **Non-spousal IRA beneficiary rules changed.** If you name someone other than your spouse as the beneficiary of your IRA, they now have to withdraw the entire amount within 10 years (whereas previously, they could stretch this over their lifetimes).

**THE OHIO STATE UNIVERSITY WEXNER MEDICAL CENTER**

In 2019 at Ohio State Wexner Medical Center, **46,703 surgeries** were performed.

**132,632 people** were treated in our Emergency Department last year.

We know it’s by inches, **but it’s making a difference.**

—JACK BUTTLER on the estate gift his late wife, JoAnn, left to support cancer research.

**MAKE AN IMPACT TODAY**

- Cash or check
- Stock or appreciated assets
- Tangible personal property
- Life income gifts
- Donor advised fund
- IRA charitable rollover gift

**MAKE A DIFFERENCE TOMORROW**

- Gift in your will or living trust
- Retirement plan assets
- Bank or brokerage accounts
- Life insurance policies

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Take the Next Steps

A gift to The Ohio State University Foundation can do more than you think. It can help provide students the opportunities they need to succeed. It can fund research that can save and improve lives not just in Ohio, but across the world. All it takes is three easy steps to get started.

1 RETURN the enclosed reply card to request your copy of Mix It Up: Combine Your Giving. Or, download your copy at ohiostate.mylegacygift.org/blended.

2 VISIT giveto.osu.edu/giftplanning to learn more about ways you can give, and the benefits they offer.

3 CONTACT John C. Woods at giftplan@osu.edu or 614-292-2183 if you have questions about the information covered in this newsletter, or if you are ready to create your Ohio State legacy.

Make an Impact at Ohio State
Whether you want to find a gift that makes an impact today or tomorrow, or combine your giving to do both, there is a gift option for you. Explore some of the many ways you can mix and match your gifts in Mix It Up: Combine Your Giving.