

From: The Citadel Foundation Planned Giving Department
Sent: 1/20/2015 7:30:14 AM
To: Haley, Nikki
Cc:
Subject: The Citadel Foundation's Planned Giving eNewsletter 01/20/2015

<<http://citadelgiftplanning.org>>

HAPPY NEW YEAR!

From The Citadel Foundation
Planned Giving Office

It is 2015 and we have a lot of exciting changes for you in the Planned Giving Office at The Citadel Foundation. The first one is that you will be receiving an educational monthly eNewsletter which is loaded with great information on finances, Washington News that affects you, planned giving, and even healthy living. This newsletter will come to your inbox on the second Tuesday of every month.

You might be asking "What is Planned Giving?" Planned Giving is the integration of your personal, financial, and estate planning goals with a your goals for lifetime or testamentary charitable giving. It's an opportunity for charitable giving in circumstances that may not otherwise allow you to make a gift to The Citadel. Depending on your personal situation, we can assist you in making a commitment to The Citadel and at the same time:

- Increase your income stream
- Minimize your income, gift, and estate taxes and minimize gift and generation skipping taxes
- Provide financial security for spouse, family, and friends
- Keep assets in the family
- Provide for education of children/grandchildren
- Relieve one of property management responsibilities and expenses

The Citadel Foundation has also expanded its Planned Giving staff to better serve you. We are ready serve you in any way as you consider making a legacy gift to The Citadel. Please feel free to contact us at any time.

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Jonathan Kresken, '87
Julie Kelley

Bill Yaeger, '83

No matter what your situation, we can assist you and your advisors by answering any questions you might have regarding a gift to The Citadel. Whether it is a brochure, an illustration, a phone call, or sitting down with you to discuss your personal situation, we are here to serve you.

Also, don't forget to check out our website at www.citadelgiftplanning.org [<http://www.citadelgiftplanning.org/>](http://www.citadelgiftplanning.org/). There you can find information, donor stories, do an illustration, or even get help in preparing your will.

Again, Happy New Year and don't hesitate to email us at plannedgiving@citadel.edu [<mailto:plannedgiving@citadel.edu>](mailto:plannedgiving@citadel.edu) or call us at (843) 953-0110.

Go Dogs!!

Jonathan, Bill, and Julie

General Weekly Thought

There is one commodity always around us, yet ever in short supply: the truth. As German Chancellor Otto von Bismarck said, "When you want to fool the world, tell the truth." In a world accustomed to spin and deception, practice honesty and be the exception.

[http://citadelgiftplanning.org/?pageID=129&docID=4
&cres_lminfo=bKcfd_d9yiJkCYVHKKCole5N2IEvMZC2v1PeFtheaWwDFAlvgnv
D4iPNnz9vsskDvGvKC_yu8wr_aEFclLvwhA](http://citadelgiftplanning.org/?pageID=129&docID=4&cres_lminfo=bKcfd_d9yiJkCYVHKKCole5N2IEvMZC2v1PeFtheaWwDFAlvgnvD4iPNnz9vsskDvGvKC_yu8wr_aEFclLvwhA)

Washington News

IRS Launches 2015 Filing Season

In IR-2015-3, the IRS announced that the 2015 filing season has now opened. Between January 15 and April 15, the IRS expects to receive over 150 million individual tax returns. [Read More <http://citadelgiftplanning.org/?pageID=30
&docID=795&RID=7226&SLID=1009>](http://citadelgiftplanning.org/?pageID=30&docID=795&RID=7226&SLID=1009)

Finances

Stocks - Intel Reports Earnings [Read More <http://citadelgiftplanning.org/?
pageID=32&docID=803&RID=7226&SLID=1009#stocks>](http://citadelgiftplanning.org/?pageID=32&docID=803&RID=7226&SLID=1009#stocks)

Bonds - Treasuries Fall on Economic News [Read More
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#bonds>](http://citadelgiftplanning.org/?pageID=32&docID=803&RID=7226&SLID=1009#bonds)