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Difference-makers | Changing lives with their time, talent and treasure

A gift to SigEp in your will? Your lifetime of service to SigEp does not have to end.



**MARCUS ROBINSON—
Serving the fraternity
in a lasting way**

University of Dayton, '99 | Donor since 2003 | Board of Governors member since 2007 | Life Insurance planned gift

“My planned gift is one more important and lasting way I can support and serve the Fraternity. From my time as an undergraduate through the ten years since, SigEp has been and continues to be a central part of my life. I’ve had the great pleasure and good fortune to be able to support the Educational Foundation financially as a member of the Board of Governors, and to serve the Fraternity regularly as a volunteer. SigEp changes lives and enriches them; of this I’m certain. As a volunteer and donor, I’m equally certain the SigEp experience would not be possible if not for the dedication and hard work of volunteers, nor without the financial support provided by the Educational Foundation through scholarships and programming. SigEp has changed and enriched my life in more ways than could be repaid in a lifetime.”

Planning Tips for Today

In these tough economic times, have you explored your individual and family financial goals? Have you included a closer look at your plan for your future? A small investment of your time now may generate meaningful benefits for you, your loved ones and the charitable organizations that are important to you.

There are several methods and considerations that must be reviewed to make the best choice for your individual situation. We hope you will find the following sample of giving methods helpful, but please consult a knowledgeable advisor such as an attorney, financial planner or CPA to help structure your plans.

Bequests may be the simplest way to make a planned gift to the Educational Foundation. We may be designated to receive an outright gift, a percentage of your estate, or as a remainder beneficiary. Your attorney can explain the best way to include the Foundation in your plans.

Gifts of Cash are a great way to make an immediate investment in SigEp. An unrestricted cash investment allows the Trustees to respond quickly to the Fraternity’s needs and opportunities. As a 501(c)(3) corporation, gifts to the Sigma Phi Epsilon Educational Foundation are fully deductible.

Gifts of Stock or Real Estate may often be more “tax-wise” to contribute than cash. These type of gifts generally offer two-fold tax savings. First, you may avoid paying capital gains tax. Second, you may receive an income-tax deduction of the full fair market value of the stock/property.

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Planned giving can be a means of “leaving a legacy.” Careful planning will allow you to express your personal values by integrating your charitable, family and financial goals.

LIFE CIRCUMSTANCE	RESTRICTED RESOURCES	GENEROUS RESOURCES
Just starting out in your career? Just starting a family or have a young family?	Consider gifts of cash that can be put to use immediately by the Educational Foundation	Consider gifts of cash as well as property or charitable lead or terms of years trusts, or life income gifts for others
Are you well established in your career? Are your children grown? Are you starting to plan for retirement?	Consider gifts of cash as well as property or charitable lead or terms of years trusts	Consider gifts of cash as well as property or charitable lead or terms of years trusts, or life income gifts for others
Are you beginning or already enjoying retirement? Are you thinking about how to leave a legacy to your children and grandchildren?	Consider options such as: gifts of cash, bequests, gift annuities or naming the Sigma Phi Epsilon Educational Foundation as a beneficiary of your life insurance or retirement plan	Consider options such as: gifts of cash or property, bequests, gift annuities, life insurance or retirement plan beneficiary, charitable lead and terms of years trusts, life income gifts for others

Use the questions in this grid a starting point for discussions with your family and financial advisors about plans for your giving. The staff of the Educational Foundation is also available to answer questions and may be reached at foundation.info@sigep.net or (804) 421-GPA1 (4721).

Welcome!

The Sigma Phi Epsilon Educational Foundation would like to welcome the 641 newest members of our donor family. Your investment in SigEp is greatly appreciated. To view a list of these donors, please go to www.sigepfoundation.org and click on "Donor Family."

We would also like to welcome the following new donors to the Board of Governors. The Board of Governors is the key donor group of the Sigma Phi Epsilon Educational Foundation's Annual Fund. Thank you for your commitment to SigEp.

Board of Governors new members

Barney Barnett
Florida Southern '65

Matt Barton
Future Undergraduate

Matt Beck
Iowa '90

Bill Becker
Indiana '72

Harry Belton
Louisiana State '81

Billy Bludgus
Miami '05

Brian Boron
Western Michigan '89

Jordan Bronston
Minnesota '09

Grant Buttram
North Carolina State '93

Terry Chung
Houston '05

Anthony Coruccini
Rider '07

Dave DeCecco
Missouri-Kansas City '04

Richard Diaz
Colorado School of Mines '07

John Durrant
Stetson '96

Patrick Fontana
Truman State '94

Rich Gannon
Delaware '87

Jeff Gargiulo
Florida State '74

Jay Garrett
Syracuse '88

Mitch Goldich
Lehigh '09

Brett Gough
Wisconsin-Platteville '03

Gregg Gowanloch
Georgia Southern '96

Brandon Haines
Indiana Institute of Technology '99

Mike Harris
Massachusetts '09

Neil Hoover
Ohio '01

Jimmy Horst
Florida International '92

Rob Hughes
Southern California '07

Jim Jones
Washburn '70

Mark Krzywonos
Northern Kentucky '84

Frank Laughon
Randolph-Macon '57

Eric Lauterbach
California-Santa Barbara '89

Andrew Lemens
Drake '08

Daniel Liu
Southern Methodist '08

Chuck Meoska
Wisconsin-Platteville '07

Greg Mezey
Cornell '09

Sean Mittelman
Ohio State '09

Justin Motika
San Diego State '08

Dan Mudd
Kansas '95

Michael Neary
Northern Illinois '90

Ryan Pirtle
Iowa State '06

Brad Polzar
Wisconsin-Platteville '07

Will Radcliffe
Texas Christian '02

Darren Rodgers
Georgia '84

Ron Smith
San Diego State '69

Jason St. John
Maryland-College Park '94

Steve Taylor
Tennessee Wesleyan '76

Brandon Tsubaki
California State Polytech-Pomona '06

Bill Tucker
Colorado '85

Peter Varney
Davidson '96

Michael Watford
Florida '75

Mark Wenrick
Oregon '96

If you are interested in learning more about the Board of Governors, please contact Sean Cosgrove at sean.cosgrove@sigep.net or (513) 519-1919.

Lifetime Giving Levels

Hall of Honor
\$5,000,000 and higher

Sigma Circle
\$2,500,000-4,999,999

Phi Circle
\$1,000,000-2,499,999

Epsilon Circle
\$500,000-999,999

The Sigma Senate
\$250,000-499,999

Chairman's Circle
\$100,000-249,999

Red Door Trust
\$50,000-99,999

Brothers of the Heart
\$25,000-49,999

Bailey's Brothers
\$10,000-24,999

Zollinger Associates
\$5,000-9,999

Ryland Hall Society
\$2,500-4,999

Medallion Club
\$1,000-2,499

Phillips Society
\$500-999

Excelsior Club
\$250-499

Trustees Honor Society
\$100-249

Corinthian Society
\$25-99

Founder's Circle
\$1-24

IN SYMPATHY

Board of Governor and SigEp benefactor passes away



L to R: David L. Balint and Doug Scheibe at the 2007 Conclave

David L. Balint, Cleveland State University, '69

Dave was a long-time supporter of SigEp and Cleveland State. He served his alma mater's Alumni Association Board of Directors and funded CSU scholarships. He was a cornerstone of the Ohio Nu chapter, especially for the alumni after the chapter became dormant. Dave was a SigEp donor since 1970, a member of the Board of Governors, a member of the Red Door Trust, and the benefactor of an endowment.

The Educational Foundation would also like to offer our heartfelt sympathy to the families of:

Robert L. Anderson (University of Pennsylvania, '50), a donor since 1981, was a member of the Zollinger Associates.

John F. Mugno (University of Texas-Austin, '60), a donor since 1968, was a member of the Medallion Club.

H. Wilson Price (University of Delaware, '42), a donor since 1971, was a member of the Medallion Club.

Serving the Fraternity in a lasting way

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Always check with a qualified advisor for the advantages and disadvantages based upon your particular circumstances.

Gifts of Life Insurance can provide a significant charitable deduction. Sigma Phi Epsilon Educational Foundation can be designated as both the owner and beneficiary of the policy. Check with your insurance agent for details.

Life Income Gifts provide an income to you or a loved one for life and make a meaningful contribution to the Educational Foundation. Speak to your advisor about "charitable remainder unitrusts" or "charitable remainder annuity trusts."

Term-of-Years Trusts are a type of unitrust or annuity which pays you income over a period of years, rather than over a lifetime. This kind of trust can provide either fixed or variable income. A term-of-years trust is often used while children are in college and extra income is needed.

Charitable Lead Trusts are basically the reverse of life income gifts. A trustee makes payments to the Educational Foundation for the amount of time you designate. After this time, the assets are transferred to your heirs. Consult with your advisor to ensure this option is right for you and your family.

One way to help determine the best options available to you is to consider your current stage in life and your available resources. The grid on page one may provide a starting point for discussions with your family and financial advisors. The staff of the Educational Foundation is also available to answer questions as well. The office may be reached at foundation.info@sigep.net or (804) 421-GPA1 (4721).