



# KAPPA SIGMA

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## Heritage Society



*Making a Difference  
Through Planned Giving*

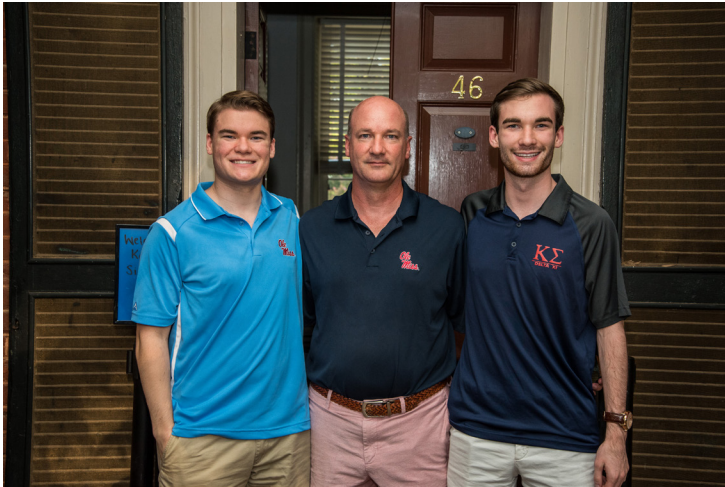


# KAPPA SIGMA HERITAGE SOCIETY

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*“Why not, my Brothers, since we of today live and cherish the principles of the Kappa Sigma Fraternity, throw such a halo around those principles that they may be handed down as a precious heirloom to ages yet unborn.”*

Stephen Alonzo Jackson, 1878



A Family Legacy: Darren Middleton, Jr.; Darren Middleton; and Brennan Middleton (Delta-Xi, University of Mississippi).

## **YOUR GIFT SUPPORTS GENERATIONS OF BROTHERS YET UNBORN**

Since 1993, Brothers who have remembered the Fraternity in their estate plan have been named to the Kappa Sigma Heritage Society. The Heritage Society is a Planned Giving program established through the Kappa Sigma Endowment Fund. Heritage Society members have pledged to make a difference beyond their lifetime for generations of Kappa Sigma Brothers yet unborn. These Brothers have found immense fulfillment in directing substantial support to perpetuate Scholarship, Leadership, Fellowship and Service within the Brotherhood.



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### WHAT PLANNED GIVING CAN DO



Russel and Joy Wiener with their family members at the Groundbreaking of the Russel L. Wiener International Headquarters Building in 2004.

The Kappa Sigma International Headquarters Building was made possible as a result of a lead gift that was provided to the Fraternity by Endowment Fund Chairman Russel L. Wiener, Phi '39, Rhodes College. His gift was responsible for providing Kappa Sigma with the finest headquarters in the interfraternal world. This facility was established as a result of Brother Wiener's generosity and in recognition of his continuous support of the Fraternity across the years, the Supreme Executive Committee and Endowment Fund Trustees named the Building in his honor.

Brother Donald Dilley, Epsilon-Phi '53, Texas Tech, gave the largest single contribution to the Endowment Fund with his planned gift. That gift provides thousands of Kappa Sigma Brothers with a multitude of scholarships. For his generosity, the Endowment Fund Trustees named the Scholarship-Leadership Awards Program in his honor.



Hugh Robert; Donald Dilley, Jr.; Mic Wilson and Chris Kontalonis gather at Brother Dilley's Home in Pensacola, Florida in 2014.

*"I would like to support anyone who has the willingness to gain an education but finds themselves without the means to do so. Kappa Sigma Brothers undoubtedly need that help and those scholarships will come in handy for those Brothers."*

Don Dilley Jr.  
Epsilon-Phi Chapter '53  
Texas Tech University





The Statue of Stephen Alonzo Jackson at the Memorial Plaza named in his honor on the Kappa Sigma Campus in Charlottesville, Virginia.

**YOUR SUPPORT TO KAPPA SIGMA'S HERITAGE  
SOCIETY MAKES OUR VISION AND OUR MISSION A  
REALITY... AND LEAVES AN INDELIBLE LEGACY**

The commitment that you make to the Heritage Society will play a significant role in Kappa Sigma's goal to leave an important legacy to future generations of our Brothers. Your gift today will make an important investment with the Brothers who will follow in our footsteps. Whether your desire is for scholarships, educational programs or gifts to further development educational resources at the Kappa Sigma Campus in Charlottesville, the legacy that you leave with your gift will help assure Kappa Sigma's position as the leading college fraternity and will help provide the brightest and most dynamic leaders.



Kappa Sigma Fraternity has prepared Brothers to be leaders for 15 decades.

## **BENEFITS OF PLANNED GIVING**

It is proven that organizations which have strong legacy programs are the organizations which thrive in the future. Planned giving helps secure an organization's future. Planned gifts provide for future funding of organizations to support their mission, future programming and significant support to the vision of the organizations. Planned giving provides benefits to both the donor and the organization receiving the gift.

All planned gifts or estate planning should be done in consultation with a qualified professional financial advisor. A current and proper will is essential to effective estate planning and is a simple way for you to carry out your long-term objectives of caring for family and others important to you. Once you have finalized your planned gift, please forward a copy of your will to the Endowment Fund and we will record your gift for the Heritage Society.

A bequest will also allow you to make a larger gift than may be possible during your lifetime. A bequest can provide for either an unrestricted gift to the Kappa Sigma Endowment Fund or for the creation of a specific endowment, which will provide perpetual support to Kappa Sigma.

## TWO TYPES OF BEQUESTS TO CONSIDER

- A specific bequest, identifying an exact amount or specific asset.
- A residuary bequest which leaves a percentage of the remaining estate after the specific bequests have been met.

## APPRECIATED ASSETS

One of the most efficient methods of giving is by transferring appreciated assets – the most common of which is stock – to the Kappa Sigma Endowment Fund. A gift of long-term appreciated stock offers you two tax savings.

- You incur no capital gains tax on the increase in value of the stock from the time you bought it.
- You qualify to receive a charitable income tax deduction for the full market value of the asset.



Kappa Sigma's Four Pillars of Scholarship, Leadership, Fellowship and Service are the values which our Chapters practice on the campuses and in the communities where we are represented every day.



Cole and Bryce Moecklin (Lambda-Epsilon, University of Central Florida) have made a commitment to Kappa Sigma as young alumni by becoming One of Jackson's Men. These brothers are "Paying It Forward" for the support they received as undergraduates.

## LIFE-INCOME GIFTS

- Through a charitable remainder trust, you can transfer assets – such as cash, stock or property – under a trust agreement that specifies how the income and/or principal will be distributed to you or others you select for your lifetime. At the expiration of the trust, the “remainder” of the trust becomes available to the Endowment Fund.
- A charitable lead trust is the reverse of a charitable remainder trust. You would transfer assets to a trust with the income distributed to Kappa Sigma for a number of years specified by you. At the end of that specified period of time, the entire assets of the trust would be distributed to the heirs you designated.



## HOW TO SIGN UP FOR THE HERITAGE SOCIETY

- Alumni Brothers who notify the Endowment Fund of their interest to name Kappa Sigma in their estate plans receive special recognition through the Kappa Sigma Heritage Society, including a listing among members of the Heritage Society in the annual report and website. Members of the Heritage Society will receive invitations to exclusive events and gatherings as well as Fraternity wide events. You will also receive a special lapel pin that identifies you as a member of the Heritage Society.
- The Kappa Sigma Fraternity staff will assist you in tailoring your gift to an area that supports your interest in providing a bequest to support important initiatives of the Kappa Sigma Endowment Fund.



The alumni of Kappa Sigma have made the success of our Chapters possible by serving as mentors and by providing important financial support.



Your planned gift today will make a significant impact on  
Kappa Sigma's vision for the future.

## LANGUAGE FOR YOUR BEQUEST

### ***Bequest of a Specific Dollar Amount***

I hereby give, devise and bequeath \$ \_\_\_\_\_ to the Kappa Sigma Endowment Fund, a 501(c)(3) Educational Foundation.

### ***Percentage Bequest***

I hereby give, devise and bequeath \_\_\_\_\_ % of my total estate, determined as of the date of my death to the Kappa Sigma Endowment Fund, a 501(c)(3) Educational Foundation.

### ***Residual Bequest***

I hereby give, devise and bequeath to the Kappa Sigma Endowment Fund, a 501(c)(3) Educational Foundation, all or a percentage of the rest, residue, and remainder of my estate.

### ***Contingent Bequest***

If (primary beneficiary) does not survive me, then I hereby give, devise and bequeath to the Kappa Sigma Endowment Fund, a 501(c)(3) Educational Foundation \_\_\_\_\_ (description of property) to be used for the Endowment Fund of Kappa Sigma.

## STAFF SUPPORT

If you wish to make a gift to the Kappa Sigma Endowment Fund through the Heritage Society, please contact Executive Director Mitchell B. Wilson at [mic@hq.kappasigma.org](mailto:mic@hq.kappasigma.org) or you can call Mic at 434-288-1129 at the Kappa Sigma International Headquarters or on his cell phone at 434-249-3021.

## YOUR PLANNED GIFT TO THE HERITAGE SOCIETY

Regardless of the size or the amount of your planned gift, all gifts make a difference whether it is a \$1,000 or \$1,000,000. The Heritage Society is about helping future generations of Brothers and every gift will make a difference.

Kappa Sigma Endowment Fund  
1610 Scottsville Road  
Charlottesville, Virginia 22902



The Home for all Kappa Sigma Brothers-The Russel L. Wiener Building and Kappa Sigma International Headquarters at the Kappa Sigma Campus in Charlottesville, Virginia.





*HELPING TO SUPPORT  
GENERATIONS OF FUTURE  
KAPPA SIGMA BROTHERS*



Brothers gather on the Lawn at the University of Virginia, 72nd Grand Conclave.