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**PLANNED GIVING**

**8 WAYS TO GIVE  
TO MERCY COLLEGE  
WITHOUT  
WRITING A CHECK**

**MERCY  
COLLEGE**

FOR THOSE WITH A PASSION TO GET AHEAD



Here are eight ways to support Mercy College that will have a profound impact on students and not be a financial burden for you.

## IT'S EASY TO DESIGNATE A PORTION OF THESE ASSETS TO MERCY COLLEGE:

### 1. YOUR WILL

Designate Mercy College as beneficiary or co-beneficiary.

### 2. LIVING TRUST

Include a donation in your trust.

### 3. LIFE INSURANCE POLICY

Name Mercy College as a full or partial beneficiary of your life insurance policy.

### 4. INDIVIDUAL RETIREMENT ACCOUNT (IRA)

Name Mercy College as a full or partial beneficiary.

*Please note: If you are 70½ or older, you can make a direct charitable gift from an IRA. The amount given to Mercy College may count toward your minimum required distribution and does not increase your taxable income.*

### 5. 401(K) AND/OR 403(B) ACCOUNTS

To help reduce the income tax burden to your loved ones, consider donating all or part of your 401(K) and/or 403(B) to Mercy College upon your passing.

### 6. CHARITABLE REMAINDER TRUST OR CHARITABLE LEAD TRUST

The Trust will make payments to your designated beneficiaries as directed, while providing a tax benefit to your estate.

### 7. BROKERAGE ACCOUNT

Your stock account can be donated to Mercy College when you list Mercy as a beneficiary.

### 8. WRITE ON ANY BANK ACCOUNT "POD, MERCY COLLEGE TAX I.D. 13-1967321"

Funds in this account are paid on your passing directly to Mercy College. This avoids probate in many states.

**Contact the Office of Planned Giving at 914.674.7782 or via email at [plannedgiving@mercy.edu](mailto:plannedgiving@mercy.edu) for a confidential discussion on how to make a difference in the lives of Mercy College students.**

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*\*This is not professional tax or legal advice; consult a qualified tax advisor or attorney about your specific needs.*

MERCY  
& COLLEGE

**MERCY COLLEGE**

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Mercy College is accredited by the Middle States Commission on Higher Education.