Automatic monthly or yearly giving offers you a convenient, impactful, and empowering way to support the causes you are passionate about throughout the entire year. Setting up a recurring gift is a one-time process designed to be simple, secure, and convenient. Once you set it up, your credit card will be charged on the schedule you specify, and you don’t have to remember to make your gift each year.

Top reasons to make a recurring gift:

1. The convenience: you can set up your donations to occur automatically at regular intervals (monthly, customized monthly, or yearly) without the need to remember to initiate each transaction manually. This streamlines the giving process and saves time.

2. Your gift is divided into manageable increments, allowing you to maximize your giving impact and avoid a large, one-time expense.

3. It saves you resources and time, and is less paper in the mail (save a tree and a stamp!).

4. A clear and consistent record of donations for tax purposes. You can easily track your contributions over time, simplifying the process of claiming deductions during tax season.

5. Maximize impact: Even small, regular contributions can add up to significant support over time.

Most importantly, it enables you to help students and school-based programs by providing steady, reliable funding. If you’d like to initiate recurring giving, please visit: www.umaryland.edu/recurringgift or scan the QR code.
Some Peace of Mind
Eight Steps for Your Estate Plan

The very idea of estate planning can be intimidating. But even a simple estate plan can provide you with the peace of mind that comes with knowing that your wishes have been spelled out.

Here are some basic steps to help you develop your estate plan.

1. Take inventory of what you own. List all of your assets and their approximate value. Include pertinent information about that asset.

2. Maintain a separate list of tangible personal property such as jewelry, dishes, books, furniture — items other than real estate and investments — and who is to receive each item upon your passing.

3. Think about your goals for your estate plan. Who do you want to benefit? How do you want to treat each of your children? Are there charities or organizations you want to remember?

4. Don’t forget your digital assets. List all digital and social channels you use. Include ID’s and passwords. This will be incredibly helpful to your family.

5. Consider whom you would like to name as your personal administrator/executor under your will or the trustee of your living trust. Person(s) you have designated to serve as your agents, e.g., the executor of your will and other professional advisors as you make your decisions.

6. Go see an attorney, preferably one who specializes in estate planning. The advice of your attorney and other professional advisors as you make your decisions.

7. Follow through on whatever actions are decided upon in the meeting with your attorney. Rely on the advice of your attorney and other professional advisors as you make your decisions.

8. Share your plans with others. Key documents are of little or no value if no one knows what they say or where to find them when they are needed. This is especially true for the person(s) you have designated to serve as your personal administrator/executor under your will or the trustee of your living trust.

One of the greatest gifts you can give to your loved ones — and yourself — is the certainty that the assets you have accumulated over a lifetime will go to the people and places you hold dear to your heart.

Please contact (410) 706-5911 or plannedgiving@umaryland.edu to request a FREE estate planning guide, or to learn about the many ways you can support UMB with your estate plan.

Ages of Giving

There are many ways to plan your gift to the University of Maryland, Baltimore (UMB). The best choice for you will depend upon your unique circumstances. Although most gift plans are applicable no matter your age, here are some gift options our generous donors have used at different stages in their lives.

When you are in the 40-54 age range, you may be busy raising your family and establishing your career. Donors in this group have found these gifts appealing:

- Outright Gift of Cash
- Gift In Your Will
- Beneficiary Designations

If you are 55-69, you are probably beginning to plan for — or maybe moving into — retirement. The best gift options for you will depend upon many factors. We would be happy to work with you and your advisors to craft a charitable gift plan that meets your needs and allows you to support the next generation of students.

In addition to the gift options above, these gift plans may be of interest:

- Outright Gift of Appreciated Securities
- Donor Advised Fund
- Deferred Gift Annuity

By the time you reach age 70, you are probably easing into retirement. These gift options might be attractive:

- Gift from Retirement Account
- Gift of Life insurance
- Charitable Gift Annuity
- Charitable Remainder Trust

Don’t Have a Will?

You’re in good company...

Nobody likes estate planning, but almost everyone needs it. The 2023 WILLS WEEK CONFERENCE offers all members of the UMB community an informative path to get started.

Held in conjunction with National Estate Planning Awareness Week, the online conference will take place Friday, Oct. 20, 2023, from 9:30 a.m. to 3 p.m., and is FREE to the UMB community.

To register, please visit umwillswEEKconference.org.