Planned Gifts

Provide a Stronger Future for Dental Education By Joining

The Dental Legacy Society

The Dental Legacy Society of the Medical University of South Carolina is composed of alumni and friends who have planned a gift for the college in their estates. Legacy members demonstrate the true spirit of philanthropy as visionary leaders who invest in the future of the James B. Edwards College of Dental Medicine. They are recognized in publications and in perpetuity on the college’s donor wall.

Contributors may design a legacy gift that incorporates planning for inheritance, retirement, estate distribution, financial security and tax wise charitable giving. Planned gifts to the college are an investment in the future of dental education. If you have included the college in your estate plan, let the college know by completing the Legacy Society Form on the reverse. We want to thank you now for your foresight and generosity and also ensure that we well document how you intend your gift to be used.

Ways to join the Legacy Society include gifts such as:

- **Bequest:** a percentage or specific amount in a will.
- **Charitable Gift Annuity:** contract between you and MUSC Foundation that guarantees a lifetime payment in exchange for cash or assets (minimum is $10,000).
- **Charitable Remainder Trusts:** make payouts to you or others for your lifetime or a term of years with the remainder value paid to the college (in some cases, MUSC Foundation will administer).
- **Charitable Lead Trust:** provides income to the college for a specific number of years after which the principal asset is returned to you or others with significant tax advantages.
- **Life Insurance:** the college may be either the policy’s beneficiary or owner. A charitable deduction may apply.
- **Real Property:** gift a full or partial ownership of real property or complete a life estate gift which allows you the right to use the property for the remainder of your life.
- **Retirement Plans or other Assets:** use of beneficiary designation or charitable roll-overs may offer tax or estate planning benefits.
- **Stock/Securities:** long-term appreciated assets may provide significant federal tax or estate benefits.

The college’s first deferred gift annuity was established by Dr. and Mrs. M. Lynn Wallace who named a treatment room and will receive income for life after retirement.

Dr. Benetta G. Bell wrote an endowed fund agreement for a minority scholarship that will be established with proceeds from her life insurance policy.

Dr. Olivia C. Palmer has bequeathed her estate to the college to establish an endowed chair (pictured with Dr. James B. Edwards at the grand opening of the Clinical Education Center).

Thanks to a generous gift of real estate from Dr. and Mrs. Cotesworth P. Fishburne, Jr., a remainder trust will provide future funding for the Clinical Education Center.

The MUSC Planned Giving Office is available to assist you and your advisors as you explore and design gift plans that meet your specific needs. For more information on planning a legacy gift, please contact Toni Jernigan, Director of Planned Giving, at (843) 792-2236 or jernigat@musc.edu.
In an effort to help the Medical University of South Carolina pursue its mission and to encourage others to make this type of gift, I would like to confirm that I have made a planned gift to the Medical University of South Carolina Foundation. I understand that all information listed on this form will be kept in strict confidence.

Name: ____________________________________________________________________________

Address: _______________________________________________________________________

Telephone Number: _______________________________________________________________

Email: ____________________________________________________________________________

Please provide the birthdates for you and your spouse, if this is a joint gift.

Month/Day/Year (self) ___________________ Month/Day/Year (spouse) ___________________

Type of Provision

☐ Bequest in Will/Living Trust ____________________________

☐ Charitable Remainder Trust ____________________________

☐ Charitable Lead Trust _________________________________

☐ Charitable Gift Annuity _______________________________

☐ Beneficiary of a retirement Plan/IRA ____________________

☐ Beneficiary of a life insurance policy ____________________

☐ Other (please describe) ________________________________

Current Estimated Amount: ____________________________________________

Comments _______________________________________________________________________

I designate my gift to help in this area: _____________________________________________

________________________________________________________________________________

☐ I prefer that you do not include my name in any published listing.

If your gift to the Medical University is for other than the Foundation’s general purposes, please describe any restrictions. Copies of your provision(s) or letters that further describe the above provision(s) are encouraged.

Please return this form to: Director of Planned Giving, Medical University of South Carolina, Office of Development, 261 Calhoun Street, MSC 182, Charleston, SC 29425, PH 843.792.2236 or 800.810.6872.

In the event of any change in the provision(s) above, please consider notifying the MUSC Office of Development.

____________________________________  _______________
Signature        Date