

MAHARISHI INTERNATIONAL UNIVERSITY

PLANNED GIVING

SECURING THE FUTURE

The success of Maharishi International University will be measured by its direct and indirect effects on the quality of life everywhere. We will count ourselves successful only when the problems of today's world are substantially reduced and eventually eliminated and the educational institutions of every country are capable of producing fully developed citizens.

—Maharishi Mahesh Yogi, 1974

What is Planned Giving?

Many people like to support the institutions that mean the most to them with a gift through their will or trust, or other type of planned arrangement. These gifts, known as planned gifts, are usually, though not always, fulfilled upon the person's passing.

Planned gifts provide a unique opportunity for you to create a lasting legacy. They

provide a way for you to pass on your values – what you have found to be most worthy of preserving for future generations.

Additionally, planned gifts are a way to achieve certain charitable and financial goals, and may yield certain federal tax advantages.

Who Can Give?

Everyone is welcome and invited to give. Often people think, “I don't have an estate, I can't make that kind of contribution.”

However, people from all walks of life can make a planned gift – not just the wealthy.

What Can I Give?

When most people think of making a gift, they think of writing a check or using a credit card. Planned gifts are usually made from people's assets, such as cash, securities,

real estate, business interests, artwork, intellectual property, retirement plan assets, insurance policies, and investment accounts.

How Do I Make a Planned Gift to MIU?

Writing your will or living trust requires specific language that accurately identifies your gift. This year, MIU is partnering with a company called FreeWill, which provides the legal forms for creating your will.

If you already have a will that does not

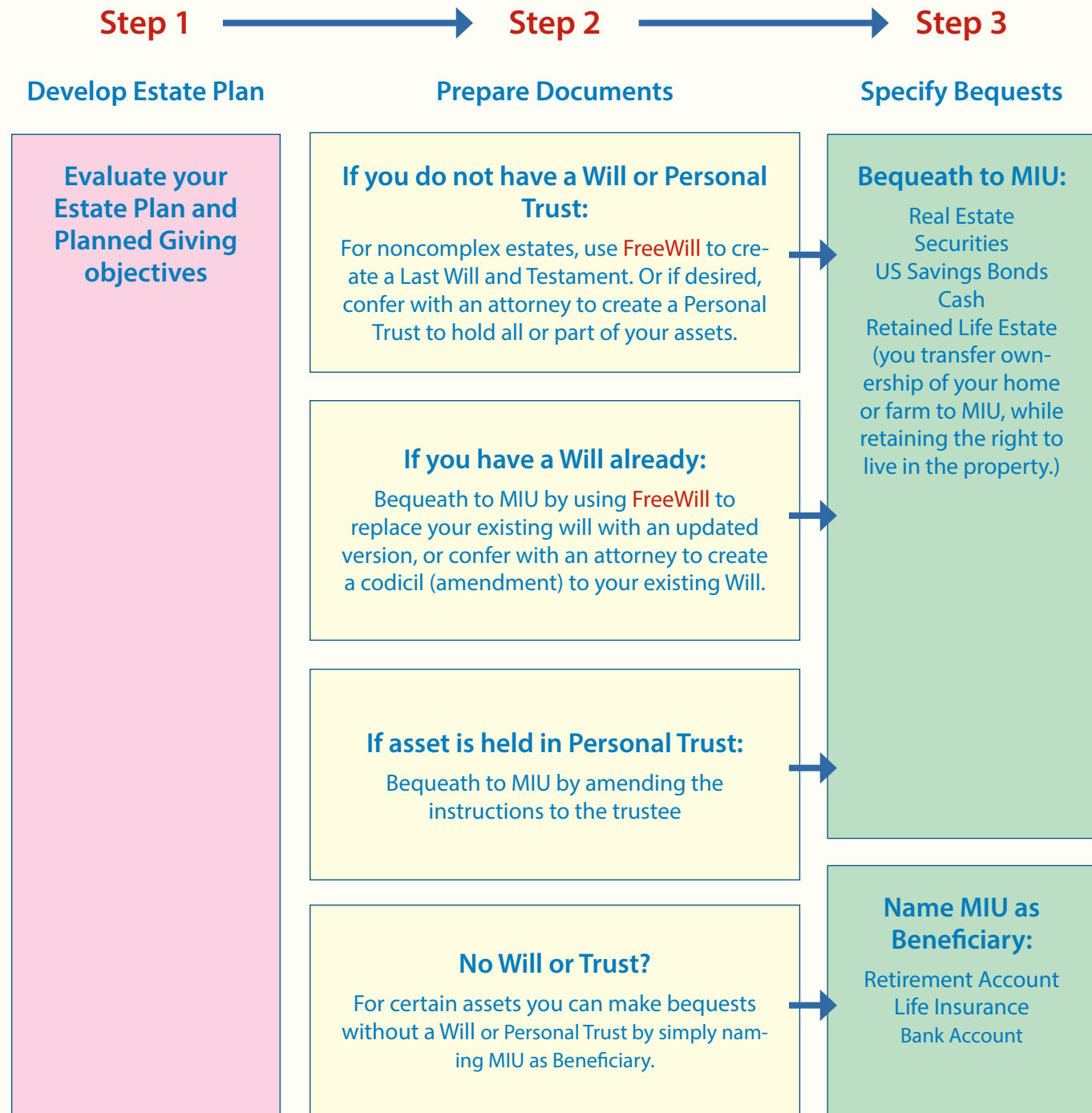
include MIU, just add an amendment to it. If you already have a living trust, use FreeWill to specify to your trustee to make the desired distribution to MIU.

Please go to FreeWill.com/MIU



Making a Bequest is Simple

PLANNED BEQUESTS



If you have questions about how to get started developing an estate plan, the MIU Development Office stands ready to assist. Our Development officers and professional advisors will guide you through each step of the process. Call Eric Stakland (641) 209-5478 or Brad Mylett (641)-472-1196.

FreeWill Makes Planned Giving Easier

This year, we are working with a company, FreeWill, to help you write your legally valid will.

It only takes 20 minutes, unless you have a larger estate, dependents with special needs, or complex family dynamics - in

which case you can pair FreeWill with an experienced attorney's help.

Access to FreeWill provides you with down-loadable forms to bring to your attorney, saving you time and money.

How FreeWill works

1. Go to FreeWill.com and fill in your information. <https://giving.miu.edu/free-will-tool/>
2. That information is combined with the precise language of FreeWill's legal forms, and provided back to you as a printable will.
3. To make your will official, sign and initial the document with witnesses present.
4. Keep your new will somewhere safe but accessible.
5. Inform MIU of your plan by filling out and sending us the enclosed Letter of Intent, so that we can track our endowment. *Note: If in the past you have already verbalized your intention of a Planned Gift, please fill out a Letter of Intent and mail it to us to formalize your intention.*



I feel blessed to be able to support Consciousness-Based education through a sizeable bequest to the University. I salute all of you who are similarly blessed! It is hard to imagine a more fundamentally beneficial legacy for our world than to give to Maharishi International University.

– John Clausen

MIU Professional Advisory Team at Your Service!

If you have a larger estate, children with special needs, complicated family dynamics, or would like to speak with someone about your plans, you may want to pair FreeWill with an experienced attorney's help. When you complete your will online, choose "I would like to review my wishes with a lawyer" and FreeWill will provide you with a set of documented wishes to bring to an

attorney, which could save you time and money. In addition, if you would like general planned giving advice from our professional advisory team, our office can schedule an appointment to consult with one of the team members to provide advice on how to develop a plan that meets your objectives and needs.



David A. Ponder
Qualified Pension Administrator, American Society of Pension Professionals and Actuaries. Financial Advisor, Eagle Strategies, LLC – Registered Investment Advisor. Lifetime Member and Top of the Table – Million Dollar Round Table. Agent New York Life Insurance Company



Matthew Frank
Chartered Retirement Planning Counselor, Private Wealth Advisor for Ameriprise Financial, Former Special Assistant to the US Commissioner on Civil Rights.



Vicki Alexander Herriott
Dean of Faculty, MIU; New York University School of Law, LLM in Taxation; member of Board of Directors of Institute for Bio-Integrity and of International Foundation for Consciousness-Based education; founder of Planned Giving at MIU



Charles Fritsch
Certified Hotel Broker in NY, VA, W.VA, and PA; president and founder-MBA Hotel Brokers; president and founder of Hotel Investor Apps, LLC



Leonard A. Goldman
New York University School of Law, JD, Bar Association member in NY, CA, and Hawaii; relevant specialties: contracts and non-profit organizations.



Marjorie Wood
Co-Founder and Vice President of Fairfield Accounting Services (taxes and accounting specialists) BA in Psychology from Smith College, MA in Higher Education Administration from MIU

Saving for a Rainy Day?

Every year, many of our supporters tell us they would like to do more to further the University's mission, but they are saving their assets for "a rainy day." However, it is possible to arrange for such funds, if unspent at the time of one's passing, to be designated as a charitable gift to MIU. These rainy day funds can serve a dual purpose, either for the donor in a time of need, or for MIU.

Given the uncertainties in our world, with things like pandemics and political and social upheavals, many of us are realizing that now is the time to act. Transferring or designating a portion of your rainy day fund to MIU will ensure your wishes are fulfilled and that MIU is secured for future generations.



We include MIU in our estate plan because education at MIU is unique in the world. MIU is focused on development of the students' awareness, the students' consciousness. Then learning becomes easy, automatic, and profound. What a beautiful education for every young person. We want MIU to always be here.

– Kathleen and Joel Cook





MAKE MIU YOUR LEGACY

There are many ways to make a planned gift to MIU. As you explore these options, you will discover tax savings and other financial and social benefits. For more information, please contact

Eric Stakland
Planned Giving Director
(641) 209-5478

or

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University Vice President
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(641) 472-1196

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Maharishi International University is a non-profit, tax-exempt 501(c)(3) corporation since 1988, designated to receive charitable gifts. EIN 42-1315493

MIU is accredited by the Higher Learning Commission of the North Central Association of Colleges and Schools since 1980.

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