A FUTURE WITH PROMISE

Scholarship Makes UK Education a Reality

Life is cyclical. Without the James C. Blair Adair County Scholarship, Karli Jessie could not have attended the University of Kentucky, where she secured an internship and later a job as a registered dietitian and food and consumer science agent in UK’s Cooperative Extension. Now, she is using her education to support one of her donor’s favorite programs.

“Mr. Blair was a big supporter of Cooperative Extension, and it is awesome that—because of him—I am in a position that I love, where I can help so many people,” Jessie says.

A 1951 graduate of UK College of Law, James Blair practiced law in Alabama and New York until he retired in 1987. He settled in Adair County, Kentucky—where much of his father's family lived—and immersed himself in the community.

He realized that with a little help, many of Adair County’s students could gain the education and experience to revitalize his hometown. Blair established the scholarship in 1998 and grew it with an estate gift. The fund provides students a four-year, full-tuition scholarship at UK. Jessie

and her sister each received the scholarship, relieving a tremendous financial burden on their family.

“I graduated with a 4.0 grade point average because the scholarship let me focus completely on my studies,” she says. “Because of that, I was accepted into a competitive

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—Karli Jessie
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dietetics program and had the opportunity to intern in my home county and for the state commissioner of agriculture.

“Adair County is a rural county. There are not many opportunities there, but because of Mr. Blair, our county is growing,” Jessie says. “He allowed students like me to come to a bigger city, experience new things and grow as people. Now, many of us are taking the skills we learned at UK back to Adair County to improve the community.”

Thank you to all of UK’s planned giving donors, who provide students access to an exceptional education. Special thanks to our Society of 1865, who secure a brighter future for UK students with their gifts. We are grateful for your support!

UK recently launched a comprehensive campaign supporting every area of the university. For more information, visit www.uky.edu/philanthropy.

What It Takes to Attract the Best and Brightest to UK

With the cost of tuition rising nationally, many talented students cannot afford to attend or complete college. UK has worked to keep costs low, but many students still have financial need. You can help!

SCHOLARSHIP OPPORTUNITIES

You can establish two basic types of scholarships:

- **Annual scholarship**—This award provides students with funds that are completely disbursed or liquidated in a single academic year. The scholarship may be renewed with ongoing commitments from you.

- **Endowed scholarship**—An endowment is funded first, and then the income it earns is used to provide students with funds. The principal remains untouched so the endowment lasts forever. UK’s endowment minimum is $50,000.

Once you have decided to make a scholarship gift, you have many choices. You can choose the assets to donate, the guidelines used to select the recipients, the scholarship name and much more.

We would be happy to help you explore your options by identifying the scholarship program and method of giving that’s right for you. Please contact our Gift & Estate Planning Office at 859-257-7886 or giftandestate@uky.edu to discuss your options. Also, visit uky.edu/philanthropy for more information about planned giving.

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Your Path to the Perfect Gift

It’s not easy choosing the perfect gift, especially when it comes to charitable giving from your estate. When to give, how much to give and the affordability of giving are common concerns. And then there’s the choice about how you want the gift to benefit you.

Whether you aim to enjoy tax savings or maintain your current lifestyle, there’s a charitable gift that meets your needs. Use the chart below to navigate these advantages and find the perfect gift—one that benefits you and makes a significant impact on future UK students.

**IF YOU WANT TO...**

<table>
<thead>
<tr>
<th>Make a larger gift now or in the future that has little or no effect on cash flow, and:</th>
<th>Make a simple, easy gift after your lifetime, and:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Receive immediate tax benefits</td>
<td>• Maintain your current lifestyle by controlling your assets during your lifetime</td>
</tr>
<tr>
<td>• Avoid taxes on assets that have increased in value</td>
<td>• Enjoy the flexibility to change plans</td>
</tr>
<tr>
<td>• Transfer the expense of insuring or maintaining assets you no longer need</td>
<td>• Pass your retirement plan assets to us tax free</td>
</tr>
</tbody>
</table>

**CHOOSE FROM THESE OPTIONS...**

- Stock or other securities
- Real estate
- Personal property

- Gift in your will or trust
- Beneficiary designation

**THEN ENJOY THE TRUE REWARD!**

Feel good knowing that you’ve created a brighter future for UK students.

*Have you already included UK in your estate plans?* Let us know. We can also help you begin planning your estate today or discuss the best planned giving options for you. Contact us at 859-257-7886 or giftandestate@uky.edu.
What if all you had to do to ensure UK’s prosperity was to write a simple sentence?

Including UK in your will is a popular decision because it is:

- **Affordable**—The actual giving of your gift occurs after your lifetime, so your current income is not affected.
- **Flexible**—Until your will goes into effect, you are free to alter your plans or change your mind.
- **Versatile**—You can give a specific item, a set amount of money or a percentage of your estate. You can also make your gift contingent upon certain events.
- **Beneficial**—All donors who make an estate gift are automatically entered into the Society of 1865, which gives them access to events and perks.

**Put It in Writing**

If you are ready to include a gift to UK in your will, ask your attorney to add this suggested wording to your will:

*I give to the University of Kentucky, Lexington, Kentucky (the sum of $____ or _____ percent of the rest, residue and remainder of my estate) for its general purposes.*

**CREATE A THOUGHTFUL ESTATE PLAN**

Careful planning is the key to creating a well-balanced estate plan. Uncover the power of having an updated will in *17 Reasons to Update Your Will* and learn how you can take advantage of your thoughtful planning with *A New Use for Your Retirement Plan Assets*. Simply complete and return the enclosed reply card for your free copies.

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**Philanthropy**

**Gift & Estate Planning**

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