

SUPPORT TOMORROW’S TIGERS *with* THOUGHTFUL PLANNING

For Dibble ’74, Princeton Loyalty Ran Deep

There are many ways to support Princeton through your estate that do not involve a will.

Charles (Chas) L. Dibble ’74 made such a gift when he named the University as the **beneficiary of his retirement plan**.

“He grew up at Princeton,” said Suzanne Dibble, one of his two sisters and the executor of her brother’s estate. “He blossomed during his four years there.”

A history major who was elected to Phi Beta Kappa, Dibble went on to earn his PhD at Stanford University, writing his doctoral thesis on the art and history of early modern Vienna. He spent most of his career at Stanford University Hospital, working his way from unit clerk in the emergency room to assistant director of access informatics, helping to improve medical records by

coordinating electronic patient information and training staff.

A world traveler, ardent runner, and environmentalist, Dibble also gave regularly to Annual Giving, often using his class year as inspiration for the amount of his contribution. His bequest was unrestricted, allowing the University to use it to meet the most pressing needs at the time the funds became available.



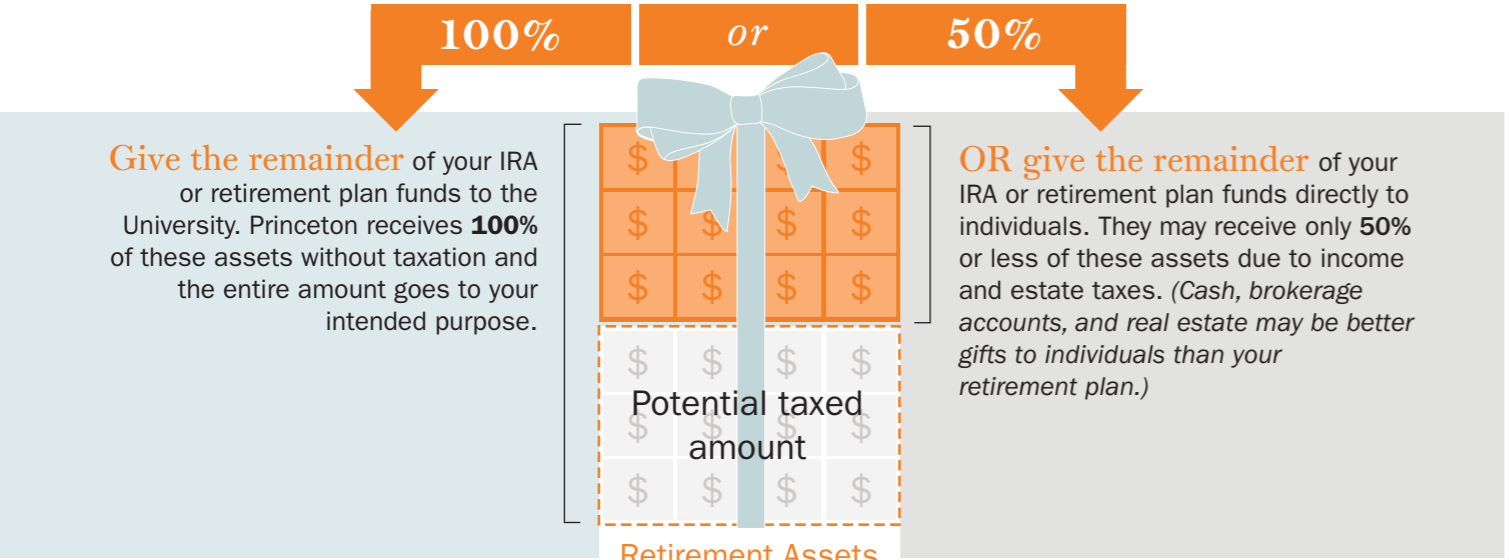
Charles Dibble ’74

When considering your legacy, be mindful that IRAs and retirement plans can be the most highly taxed assets in an estate. Advisors in Princeton’s Office of Gift Planning can walk you through your options. Learn more at: <http://giving.princeton.edu/giftplanning/bequests/retirement-plans>

See sample bequest language at <http://giving.princeton.edu/bequest-language>

HOW CAN I MAKE *the* BEST *possible* GIFT?

When you create your estate plan, remember that assets are treated differently for tax purposes. Consider what happens with IRA and retirement plans, depending on the recipient.



KATHERINE GRAVES OVERBEY ’89 THINKING CRITICALLY ABOUT THE FUTURE

When Alumni Schools Committee interviewer Katherine Graves Overbey ’89 talks to prospective Princeton students, she tells them that they won’t earn a degree that simply prepares them for a particular career, such as accounting or business. Rather, they will graduate with a liberal arts education that will be valuable in whatever path they choose.

“Princeton teaches you how to think critically, and that is directly applicable no matter what you want to do in your life,” says Overbey, known as K-T, who majored in politics and is an assistant vice president at Cincinnati Children’s Hospital in charge of operations and business development for its quality improvement division.

The mother of three teenagers and a dedicated community volunteer, she uses the critical thinking skills she honed at Princeton “every single day.”

Her Princeton experience had such a tremendous impact on her life that in her late twenties she **named the University as a beneficiary in her will**. She sees the bequest as a “personal statement of who I am and what I value.”

A LIFELONG CONNECTION

As a high school junior, Overbey initially wasn’t interested in the University because she had an impression of it as “uptight and snobbish.” But after visiting campus, she realized she had been “completely wrong.” And she wasted no time getting involved as a freshman, joining student government, and later becoming manager of the varsity football team: “It was like having a hundred big brothers on campus,” says Overbey. She treasures the friendships she made and the lessons she learned from professors who were “literally the world-class experts on their



“It’s just always felt right to give back to Princeton because it has meant so much to me.”

subjects.” She recalls faculty members such as Professor of Politics Emeritus Stephen Cohen, who had to cancel a Soviet politics class because he was called to the White House to offer advice.

In addition to volunteering with the Alumni Schools Committee, Overbey is a loyal Annual Giving supporter, former vice president of her class, and proud member of the 1746 Society. She believes that giving back to Princeton is the key to preserving the University’s strength, “not just for the next 10 years, but for the next 200 years.”

confidential REPLY

☐ **YES**, I have named Princeton in my estate plans and would like to be enrolled in the 1746 Society.

Gift amount \$ _____

YES, please send me information about *(check all that apply)*

- ☐ Making a bequest to Princeton
- ☐ How Princeton invests charitable trusts *(The Office of Gift Planning’s annual report)*
- ☐ Making a gift of real estate to Princeton
- ☐ Gifts to Princeton that provide payments to me and/or another beneficiary

With the following information, we can provide an illustration of payments:

Beneficiary birthdate _____

Relationship *(e.g. self, spouse, child)* _____

Beneficiary birthdate _____

Relationship *(e.g. self, spouse, child)* _____

Gift amount for illustration only \$ _____

Name _____ Class Affiliation _____

Address _____

City _____ State _____ Zip _____

Phone _____ E-mail Address _____

☐ I prefer to receive *Generations* via e-mail

← **DETACH** here

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HALF, SEAL, and MAIL*

*if MAILING INTERNATIONALLY,
PLEASE INSERT in an ENVELOPE*



Trevor Forde '74, Matthew Kinsey '98, and Roger Moseley '55 converse at this year's 1746 Society luncheon.

Forever PRINCETON

Become a member of the 1746 Society by making a planned gift to Princeton. Benefits include invitations to special events and the opportunity to receive expert advice from the University's philanthropic advisors. To learn more about planned gifts and possible tax benefits for you and your family, please call the *Office of Gift Planning* at **609.258.6318** or e-mail us at **1746soc@princeton.edu**.

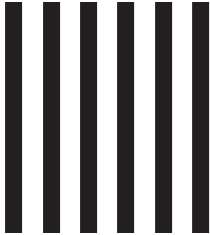


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EXPERTS ADVISE *on* FAMILY GIVING

The Office of Gift Planning hosts an annual program during Reunions on smart giving strategies. This year's lively discussion with three alumni experts focused on how to best involve family in philanthropic decisions. Listen to the podcast at giving.princeton.edu/wise-giving and stay tuned for news on next year's event.



"Families actually consist of five different kinds of capital: financial, human, intellectual, social, and spiritual. Financial capital has to support the other four."

—James (Jay) Hughes '64, author of three books on stewardship across generations



"The experience of managing money, doing things with it and thinking about it, doesn't come particularly with any age. It does come with having the responsibility."

—Malcolm Moore '59, nationally recognized wealth management lawyer



"Develop a philosophy of giving—even with small things—and impart that to your children. Princeton does this in a great way—I remember the first week that I was here they talked about 'Princeton in the nation's service.'"

—Richard Rampell '74, a CPA in estate and charitable gift planning

EXPLORE tax-wise gift options using
our **GIFT CALCULATOR** at

<http://giving.princeton.edu/giftplanning> or call **609.258.6318**

The information presented in this publication is not intended as legal or financial advice. Please see your own professional advisors to discuss your specific situation.

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For address changes, call **609.258.3114** or e-mail alumrecs@princeton.edu

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Civil engineering students tour the future home of the Andlinger Center for Energy and the Environment with Sam Rozycki, left, senior project manager at Princeton's Office of Design and Construction.

You can make a positive impact on today's students and future generations by naming Princeton as a beneficiary of your will, IRA, or retirement plan.

A bequest from Charles C. Waugh '40 established a curriculum development fund at the School of Engineering and Applied Science.

- ❖ **TELEPHONE:** 609.258.6318
- ❖ **E-MAIL:** 1746soc@princeton.edu
- ❖ **WEB:** <http://giving.princeton.edu/giftplanning>

Cover: Professor of Mechanical and Aerospace Engineering Michael Littman, who teaches a freshman seminar exploring how vintage design informs new technology, works with Daniel Zirkel '16 to refurbish a motorcycle.



Ideas and Strategies from the *Office of Gift Planning* at Princeton University | Fall 2014

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