

CREATE YOUR *Brown Legacy*

'It's never too early to think about where and how you can give.'

A PLANNED GIVING NEWSLETTER FOR FRIENDS OF BROWN UNIVERSITY | SPRING 2017

NEVER TOO YOUNG TO GIVE BACK

Recent Alumnus' Gift Makes Brown Part of His Future

Jason Klein '00 credits Brown University for his career and personal success.

"My four years there were amazing," he says. "It's one of the best decisions I've ever made." Jason, who graduated in 2000 with a concentration in biomedical ethics, had planned to be a doctor. He started medical school but then decided to take a year off.

He got a job at an online retail music company co-founded by 1996 Brown graduates Christian Anthony and Matthew Wishnow and never went back to medical school.

In 2002, Christian and Jason started their own digital agency, Special Ops Media, which grew to 100 people before they sold it in 2008. Shortly after the sale, the two created ListenFirst Media, a social media analytics software company in New York. One of the company's first clients was Brown alumna Alexandra Shapiro '94 at USA Network.

"I think the exposure at Brown to different experiences and activities and classes and people gave me the confidence to go out and do something on my own," Jason says. "Wherever I go, Brown continues to open more doors to success."

Jason has served as a longtime Brown volunteer and has donated each year since graduation. He earmarked money for Brown in his first will, drafted at age 24, when he started his first business.

"[The gift] wasn't all that impressive, but it was important to me to include the University as a part of my philanthropy," Jason says.

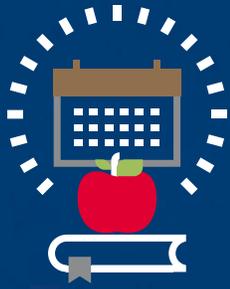
"As I've gotten older and created an income for myself, I've continued to make Brown a larger part of my planned giving," he says. "Hopefully I can be a reminder that even when life is just ramping up, it's never too early to think about where and how you can give and plan your estate."



Jason Klein '00



You can follow in Jason's footsteps and give an estate gift that helps keep a Brown education within reach for our bright and promising students—no matter what stage of life you are in. Contact the Office of Planned Giving at 401 863-9119 or Planned_Giving@brown.edu today to discuss your options.



\$62,046

Tuition and
fees for a year
at Brown

A POWERFUL PIECE OF PAPER

Why a Will Is the Way

Establishing a financial footprint starts with three basic documents—a birth certificate, driver's license and a Social Security card. With those simple pieces of identification, you can open a bank account, apply for a job, or buy a car or home.

But what document helps your loved ones manage those assets after your passing? A will. Without one, those closest to you may endure unnecessary stress and anxiety because they do not know your intentions.

Despite the importance of this document, a recent poll found that only 33 percent of Americans have a will.*

What a Will Can Do

No matter if you are 21 or 101, a will should be among your most important documents. When you create one, you ensure that the individuals and causes you care about now are being taken care of after your lifetime. With a will, you can:

- Direct the division of your property the way you choose, not the way the state decides.
- Make special financial arrangements for family members who are minors, disabled or unfamiliar with money management.
- Select an executor who is qualified to settle your estate promptly and economically with careful attention to your wishes.
- Name a guardian for any minor children.
- Devise an estate plan—with the help of a qualified attorney and other advisors—to ensure that all your assets are passed pursuant to your wishes.
- Support Brown University and other charitable organizations you care about.

Use Your Will for Good

If you are creating or updating your will and would like to ensure that no student who belongs at Brown encounters cost as a barrier, contact the Office of Planned Giving at 401 863-9119 or Planned_Giving@brown.edu today to learn how you can make a difference for these talented and deserving students.

*2016 NMI Healthy Aging Database® Study

BROWN UNIVERSITY'S
FEDERAL TAX ID NUMBER: 05-0258809



\$47,940

Average financial
aid award for a
member of the
Class of 2020

THE GIFT THAT PUTS FAMILY FIRST

How to Be Charitable When Resources Are Limited

We realize the importance of providing for family and other loved ones after you are gone, and supporting Brown University does not mean that they will be forgotten. If your retirement savings is part of your inheritance plan, there is an easy way to benefit both your heirs and Brown.

You can split your retirement plan assets among your heirs and designate a percentage to support Brown. By dividing up your assets into percentages, you can support your loved ones AND provide life-changing educational opportunities. And because this is a gift you make after your lifetime, your current budget is not affected and you can change your mind at any time.

Make Your Gift in 3 Easy Steps

This is one of the simplest planned gifts you can make. Here is how to give your gift:

- 1] Contact the administrator of your retirement account and request a change-of-beneficiary form.
- 2] Decide what percentage of the account's value you wish to give to Brown and name us, along with the stated percentage, on the beneficiary form.
- 3] Return the signed form to your plan administrator.

Even 1 Percent Matters

Giving a small percentage of your retirement account can have a bigger impact at Brown than you might think. Contact the Office of Planned Giving at 401 863-9119 or Planned_Giving@brown.edu today if you have questions about naming us as a beneficiary. If you have already named us as a beneficiary, please let us know so that we can thank you for your generosity.



INSIDER TIP

If supporting Brown is a part of your future plans, share your intentions with loved ones. Does your family know why the University is important to you? Tell them! These conversations help ensure that your family understands your intentions. You could also inspire them to make their own philanthropic connection.

'Our planned giving team looks forward to partnering with you to help you achieve your charitable and financial goals.'



GREETINGS FROM NEW PLANNED GIVING LEADER SIERRA ROSEN

I am thrilled to introduce myself as the new executive director of planned giving. I joined the Brown community in February and, in my short time here, have appreciated the opportunity to meet many engaging, thoughtful and generous faculty, alumni, parents and friends.

Prior to Brown, I served as the director of gift planning at both Harvard Business School and Northeastern University. Earlier in my career, I worked in planned giving at Wellesley College and began working with nonprofits, colleges and universities at State Street Global Advisors as part of their Charitable Asset Management group.

This is an exciting time to join the Brown family, and I feel confident that planned giving will play an ever-increasing role in BrownTogether's ambitious plan to raise \$3 billion. Our planned giving team looks forward to partnering with you to help you achieve your charitable and financial goals.

I hope to meet more of you in person at our annual College Hill Society luncheon on Friday, May 26, 2017. We are pleased that Jill Furman '90 will be joining us to discuss her role as a Tony Award-winning producer of *Hamilton*. Please feel free to contact our office at 401 863-9119 or Planned_Giving@brown.edu for more information.

In the meantime, do not hesitate to reach out and introduce yourself. I would love to hear from you and learn why Brown is important to you!



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