

Beta-Nu Chapter

UNIVERSITY OF KENTUCKY | KAPPA-SIGMA FRATERNITY



continue the tradition!



From your Beta-Nu Brothers

The alumni leadership team, with the cooperation of the undergraduate brothers of the Beta-Nu Chapter of Kappa Sigma, have developed an exciting new vision for the building of a new house as well as endowing areas for career preparation, leadership development and scholarships.

As you are likely aware, the existing house was recently demolished by the University. The house and the rest of the "six pack" or old Bear Bryant football dorms have been a part of the university's re-development plans for some time now. This area of campus will now house a new commissary and other food service facilities.

We now need to raise \$5.0 million in fundraising and financing to build our new house on Woodland Avenue between Rose Lane and Columbia Avenue. The University will start construction on our house when we have \$2.5 million in cash. This is much more than raising the funds to build a new house. It is a campaign to build a house that will serve as a first class living-learning environment. This will be the base where our young men live together, build lifelong friendships, develop their leadership skills, and do what it takes to be career-ready.

As we plan for the next 25 years and beyond of the Beta-Nu Chapter we hope that you are willing to "step up" and "make



a difference." Beta-Nu is no different than any business or non-profit. We will be as successful as the commitment of our alumni and undergraduate members. Let's get our undergraduate members into a new house as quickly as possible.

Thank you in advance for your support! Your tax-deductible gift to UK and Kappa Sigma will make a difference!

AEKDB,
Bob Droste '76,
House Corporation President

Michael Cayse '02,
Alumnus Advisor

Michael Bowling '86,
Campaign Co-Chairman

Gerald Nichols '55,
Campaign Co-Chairman

Hon. Paul Patton '56,
Campaign Co-Chairman

Michael Stacy '92,
Campaign Co-Chairman

Gary Ulmer '76,
Campaign Co-Chairman

Mic Wilson '78,
Kappa Sigma Executive Director & Co-Campaign Chairman

Beta-Nu Vision of Excellence

We Commit To Be An Undergraduate Chapter of Excellence

1. We recruit the very best members we can and then hold them accountable to academic, involvement, leadership, service and social excellence.
2. We ensure our chapter follows a vision and goals to guide us to success.
3. We see that officers and committee chairs are well trained and that advisors are in weekly contact with them.
4. We recognize our members for academic, campus & chapter involvement, intramurals, leadership and service.
5. We measure our success by the jobs our graduates get, by how committed they stay and by the awards we win.

We Will Maintain High Standards For Alumni & Undergraduates

1. We see that our advisors and EC hold our members accountable for their actions.
2. We encourage members to maintain a GPA above the University All-Men's Average; to serve the chapter on a committee or in an EC position; to serve in at least one campus organization; to be ritually proficient; and to provide at least 25 hours of service annually.
3. We charge market rents to our members as well as provide the funding needed for professional staff, educational programming and scholarships.
4. We teach lifetime commitment to the Chapter, Kappa Sigma and University, remembering that we all, alumni or undergraduate are responsible for the success of the Chapter.
5. We ask that alumni, parents and undergraduates make an annual gift to the chapter to help us reach and maintain our excellence. We recognize all donors in the house, on our website and in the newsletter or e-news.

We Will Maintain a 1st Class Alumni & Parent Association

1. We improve our alumni & parent records and then ensure that we maintain them.
2. We commit to regular communication with alumni and parents via e-news, Facebook, LinkedIn, newsletters and our website.
3. We commit to hold fall and spring alumni & parent events (Homecoming/Hall of Fame, Parent Weekend and Keeneland), as well as host a luncheon or after work gathering at least every six months in Lexington and Louisville.
4. We ensure that alumni are inducted into our Beta-Nu Hall of Fame each year.
5. We improve the number of alumni and parents making contributions to the chapter each year.

We Will Identify, Recruit, Train & Recognize A Professional Staff & Volunteer Team

1. We employ a House Director/Resident Advisor who will oversee the property management as well as day-to-day operations of the chapter.
2. We employ a Faculty Advisor who advises the undergraduates on academics and career advice.
3. We identify, recruit, train and recognize an Advisory Board of at least five alumni, continually update this board keeping our advisors engaged in the chapter.
4. We identify, recruit, train and recognize an Alumni Association Board of at least five alumni, continually update this board to keep our board focused on alumni and parent relations.
5. We identify, recruit, train and recognize a House Corporation Board of at least 11 alumni, continually update this board to keep our board focused on housing operations.

We Will Rise The Funds To Build A New House & Establish An Educational Endowment

1. We commit to raise the funds needed through fundraising and financing to build our new house (\$5.0 million).
2. We commit to pay down any debt as soon as possible to ensure that the undergraduate rents remain competitive (we prefer to keep the debt under \$1.0 million).
3. We fund a scholarship endowment through annual and planned gifts with a long-term goal to provide \$50,000 annually in scholarships (\$1.0 million).
4. We fund an educational endowment through annual and planned gifts with a long-term goal to provide \$25,000 annually for leadership development (\$500,000).
5. We fund a career endowment through annual and planned gifts with a long-term goal to provide \$10,000 annually for career development (\$200,000).



LEADERSHIP

ADVISORY BOARD

AA-GM
Michael Cayse '02
michaelcayse@gmail.com
859-433-4805

AAA-GP
Matt Rippetoe '02

AAA-GMC
Brice Carr '00

AAA-GS
Jeff Malicote '84

AAA-GT
Joe Hsu '98

ALUMNI ASSOCIATION & HOUSING CORPORATION BOARD

President
Bob Droste '76,
robert.droste@sekologistics.com
502-445-5123

Vice President
Mike Gray '77

Treasurer
Russell Tucker '71

Secretary
Open

Property Management
Roger Baird '72
Jeremy Bates '90
Bill Erwin '90

Alumni Association
Jeremy Bowling '90
Michael Bowling '86
Kenny Coleman '03
Travis Frick '95
Michael Stacy '92

Architectural & Construction
Doug Cull '80
(looking for others)

Finance
Bill Baustien '76,
Hank Robinson '76
Jeff Uhling '76

Fundraising
Gary Ulmer '76

Legal
Marshall Hixon '90
Jeremy Nalli '95

Campaign Volunteers

These volunteers will be the key to the success of our campaign. If you are willing to make a difference in Beta-Nu's future by serving in one or more of the areas below, please contact Matt Noble at matt.noble@fmgtucson.com or 520-990-3250.

Art Curtis '54
Gerry Nichols '55
Paul Patton '56
Al Sullivan '57
John Fitzwater '59
Bill Cox '61
Bill Corum '63
John Collins '63
Mac Zachem '63
Ronald Kissling '65
Bruce Leslie '66
Lee Hess '66
Barry Ogilby '66
Benjamin Sewell '67
Frank Houpt '68
Larry Blair '70
Thomas Guglielmo '71
Russell Tucker '71
Michael Bewley '72
Roger Baird '72
Bill Leavell '72
Jay Jones '74
Mark Joyce '74
Patrick Richardson '74
David Dye '74
Bo Bollinger '75
Michael Bowling '75
Bill Baustien '76
Bob Droste '76

Gary Ulmer '76
Steve Ader '77
Hank Robinson '77
Mike Gray '77
Mic Wilson '78
Benjamin Schmidt '78
John Barton '79
Jim Malone '80
Todd Burk '81
Mark Jordan '81
Carl Bisig '82
Matt Noble '84
Danny Flora '85
Scott Shirley '85
Michael Bowling '86
Gar Arnett '87
David Potter '87
Will Cox '88
Walter Zausch '89
Jeremy Bates '90
Joseph Bowling '90
Bill Erwin '90
Marshall Hixson '90
Gregg Potter '90
Brian Heck '91
Michael Stacy '92
David Wolfford '92
Matt Mauller '93
Garrett Stiglitz '93

Jonathan Nalli '94
Travis Frick '95
Jeremy Nalli '95
Mike Ryan '95
Trevor Cravens '98
Tony Giska '98
Bert Griffin '98
Joe Hsu '98
Tim Guillaume '98
Jon Steimel '00
Eric Wolfe '00
Nate Stein '00
Will Chambers '01
Seth Brooks '02
Michael Cayse '02
Ryan Heimke '02
Matt Rippetoe '02
Mike Bash '03
Kendrick Coleman '03
Wesley Adams '07
Zachary Lathram '07
Taylor Pierce '07
Brad Rose '07
Michael Zeit '08
Patrick Hollowell '08
Eli Lathram '08
Nolan Jackson '09
Clayton Lykins '10
Nicholas Adams '11

UPDATE

CAMPAIGN VISION

Raise \$5.0 million in funding for the new house with not more than \$1.5 million being long-term debt (we are better off with no or very little debt).

Of the \$5.0 million above, secure at least \$2.5 million in campaign donations and financing to enable the university to begin construction in 12-18 months.

Once the housing need is met start raising funds to endow career preparation, leadership development and scholarships. Our minimum overall goal is to have a \$1.7 million endowment. This will enable us to provide \$50,000 in scholarships, \$25,000 in leadership development and \$10,000 in career preparation annually. We hope alumni will consider the chapter in their annual giving and estate plans to allow us to reach this goal in the next 5-10 years.

UK & Kappa Sigma TODAY

University Facts

- ➔ Approximately 29,000 students;
- ➔ Founded in 1865;
- ➔ Greek Life has a rich tradition at UK, starting in the 1890's;
- ➔ Currently it has 26 Fraternities and 17 Sororities with over 5,000 individual members;
- ➔ Average IFC Fraternity Size = 100;
- ➔ Average Panhellenic Sorority Size = 125;
- ➔ UK Greek system is one of the most successful in the U.S. and is focused on developing future leaders;
- ➔ The Interfraternity Council and the Panhellenic Council, along with the UK Campus Habitat are helping Lexington Habitat for Humanity to raise \$42,500 to sponsor a home in partnership with Joseph, Yvonne, their two-year-old son Luke and one-year-old daughter Jeanne at 809 Burgess Ave;
- ➔ The University has set up a Kappa Sigma Building Fund through their Foundation and all gifts will be 100% taxdeductible. These gifts will also be counted towards your annual UK donation recognition and all the benefits that comes with your gift;
- ➔ UK Greek Life: <http://fraternitysororityaffairs82160.orgsync.com/home>.

Chapter Facts

- ➔ 111 Active members;
- ➔ 1,737 Alumnus;
- ➔ Our goal will be to maintain a GPA of 3.00 or above;
- ➔ Our goal will be to provide 20 hours of community service per member per semester, as well as, chapter donations to charities of at least \$5,000 annually;
- ➔ We will have members involved in most campus organizations;
- ➔ Volunteers needed to join the following committees/boards: Advisory Board, Alumni Association Board, Housing Corporation Board and Campaign Steering Committee;
- ➔ Our goal will be to win the Founders Award for Chapter Excellence (FACE) annually;
- ➔ Web: kappasigmauk.com;
- ➔ Facebook: [facebook.com/groups/kappasigmauk](https://www.facebook.com/groups/kappasigmauk);
- ➔ Twitter: twitter.com/KappaSigmaUK;
- ➔ LinkedIn: [linkedin.com](https://www.linkedin.com).

BUILDING PLANS

OPTION "A"
5 OF 6



FRONT ELEVATION

SCALE: 1/8" = 1'-0"

OPTION "B"
5 OF 6

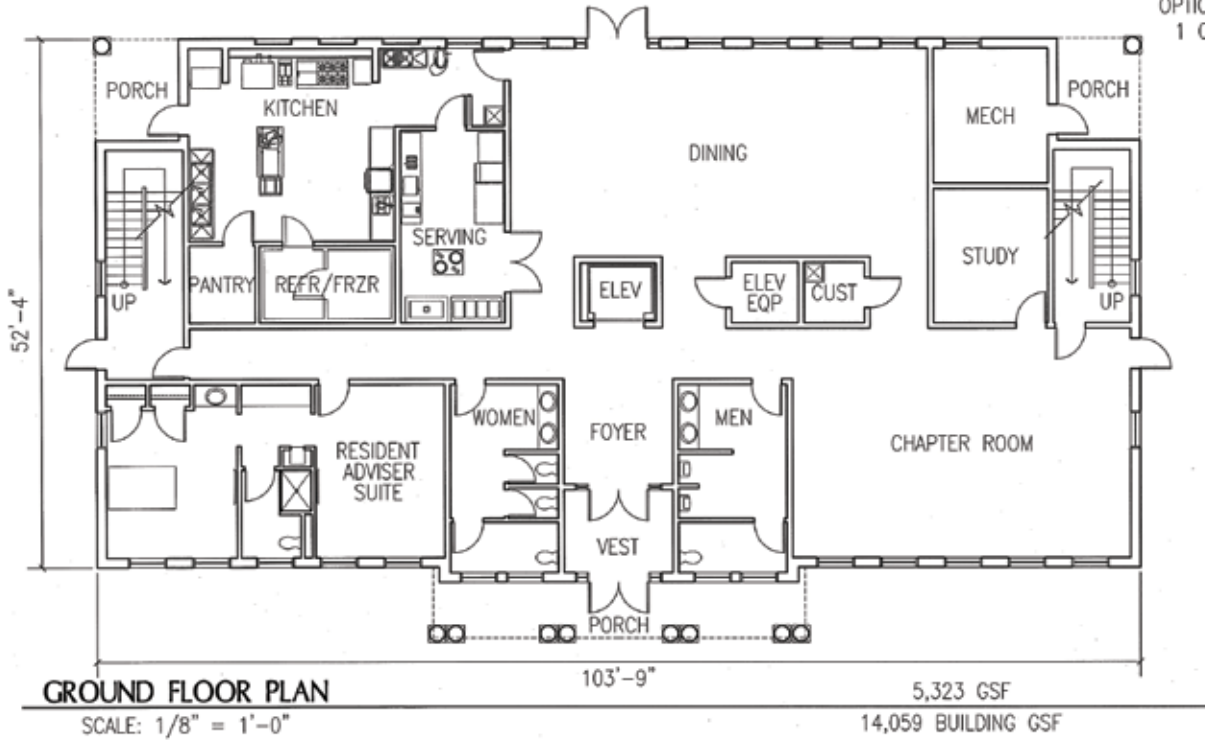


FRONT ELEVATION

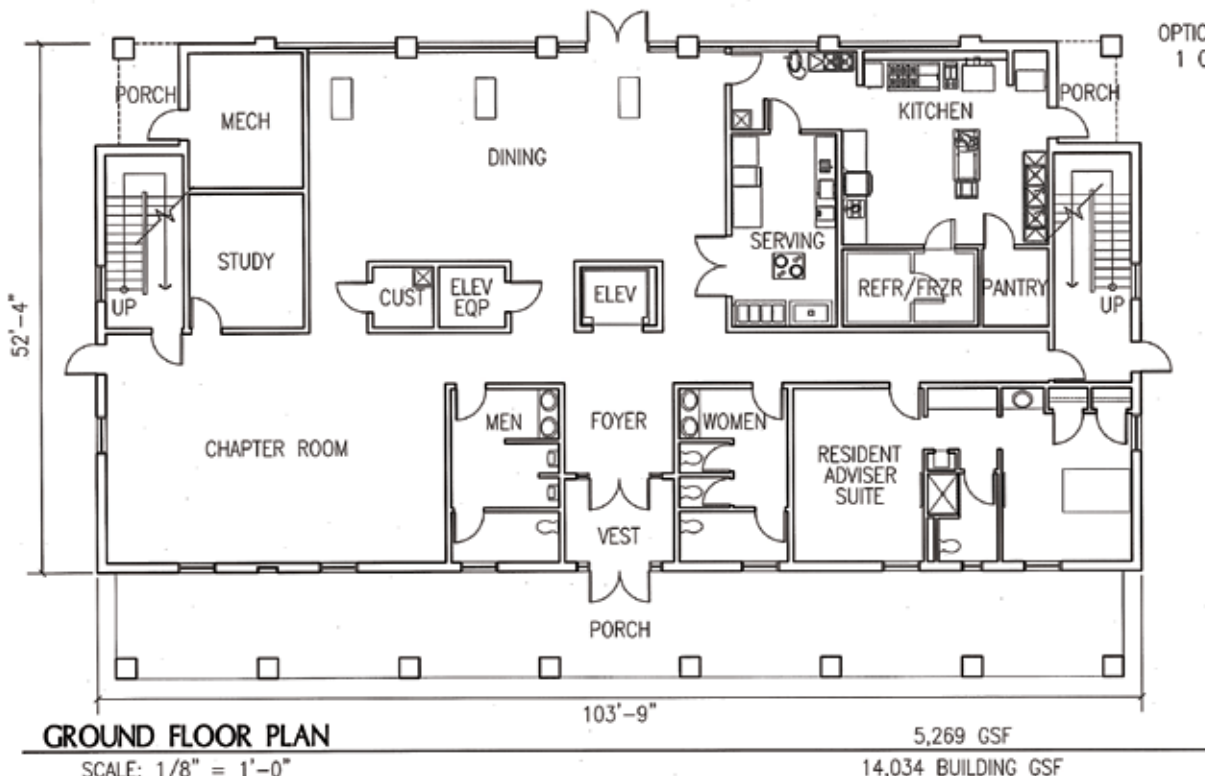
SCALE: 1/8" = 1'-0"

BUILDING PLANS

OPTION "A"
1 OF 6

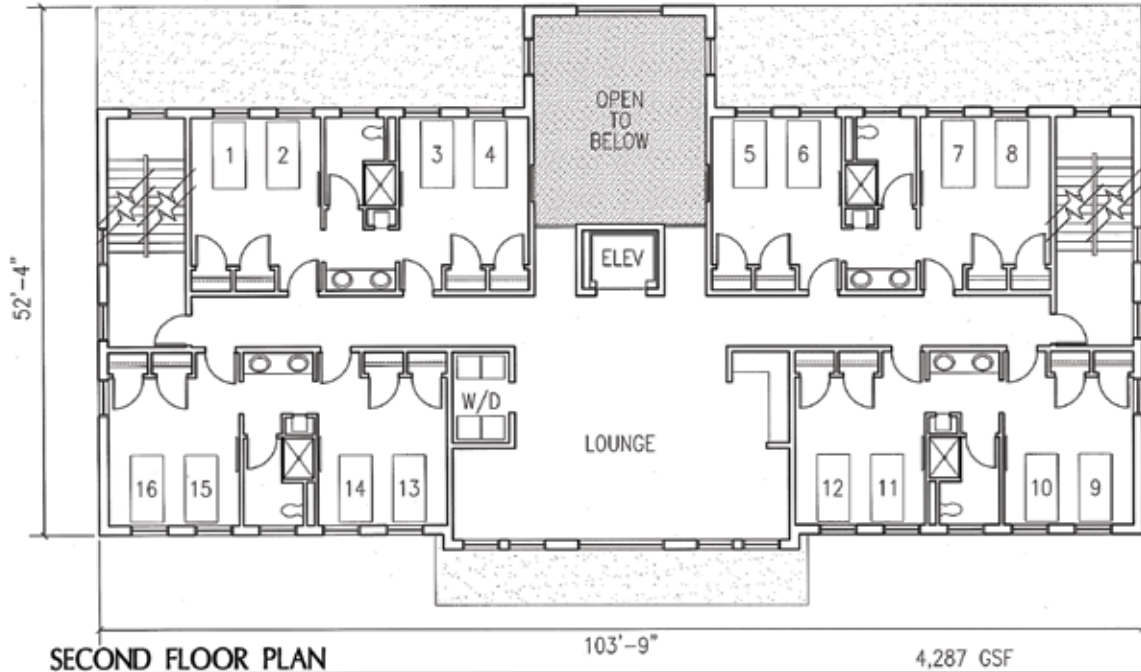


OPTION "B"
1 OF 6

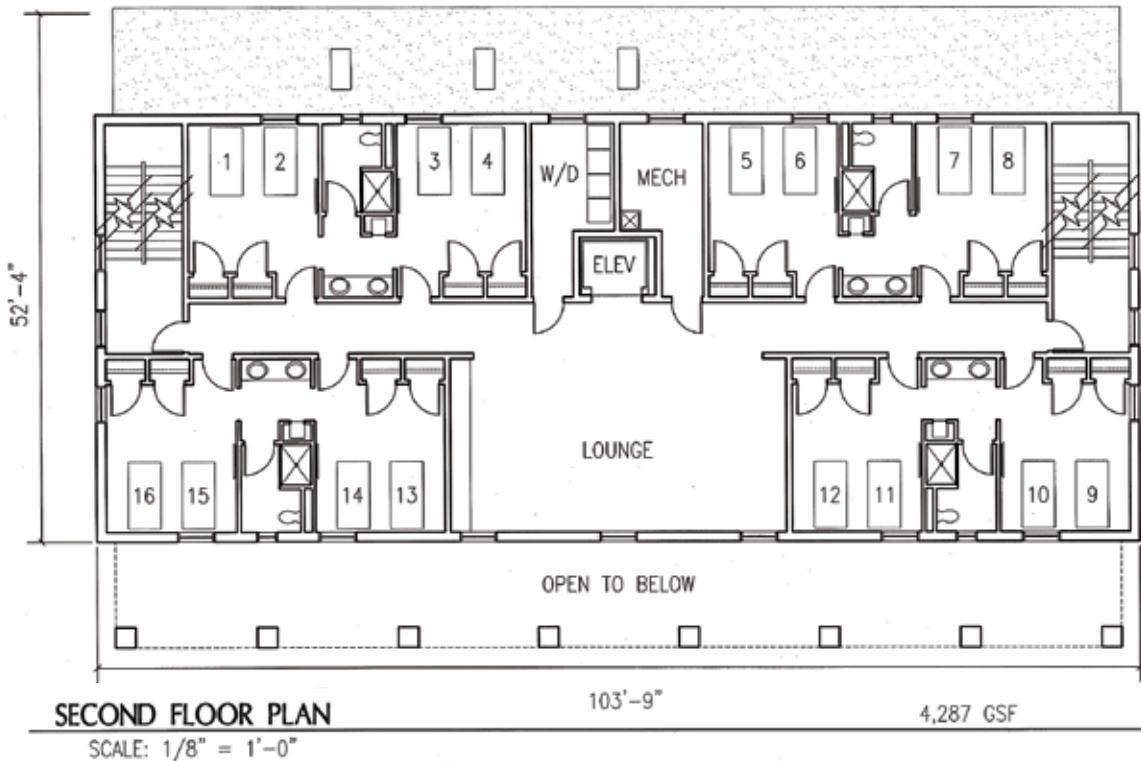


BUILDING PLANS

OPTION "A"
2 OF 6

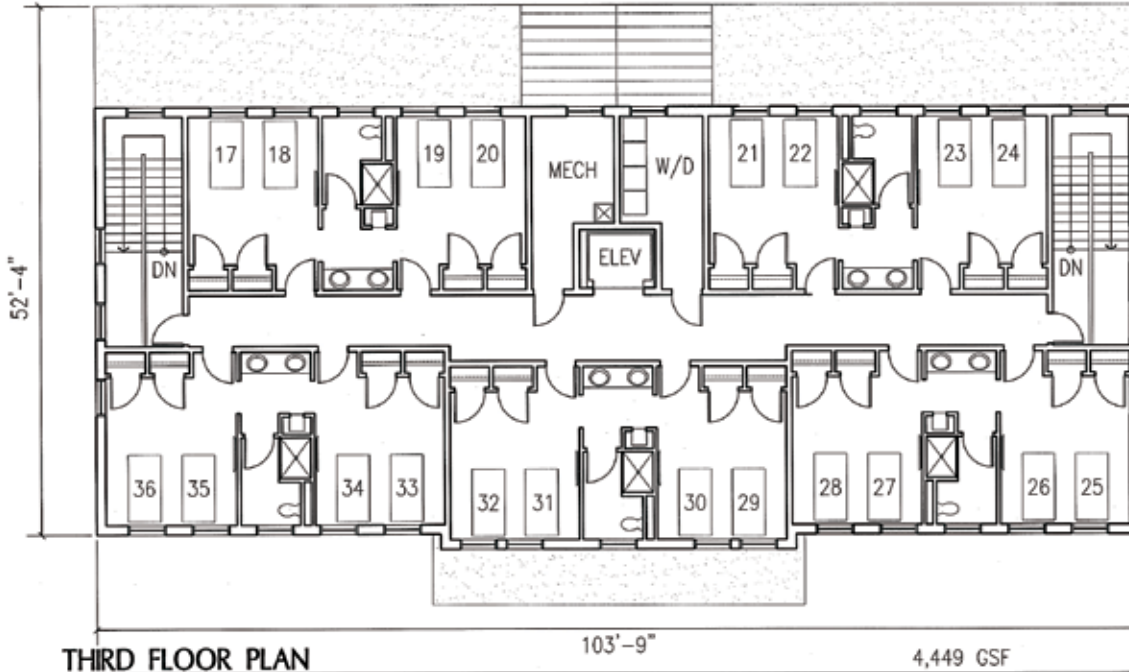


OPTION "B"
2 OF 6



BUILDING PLANS

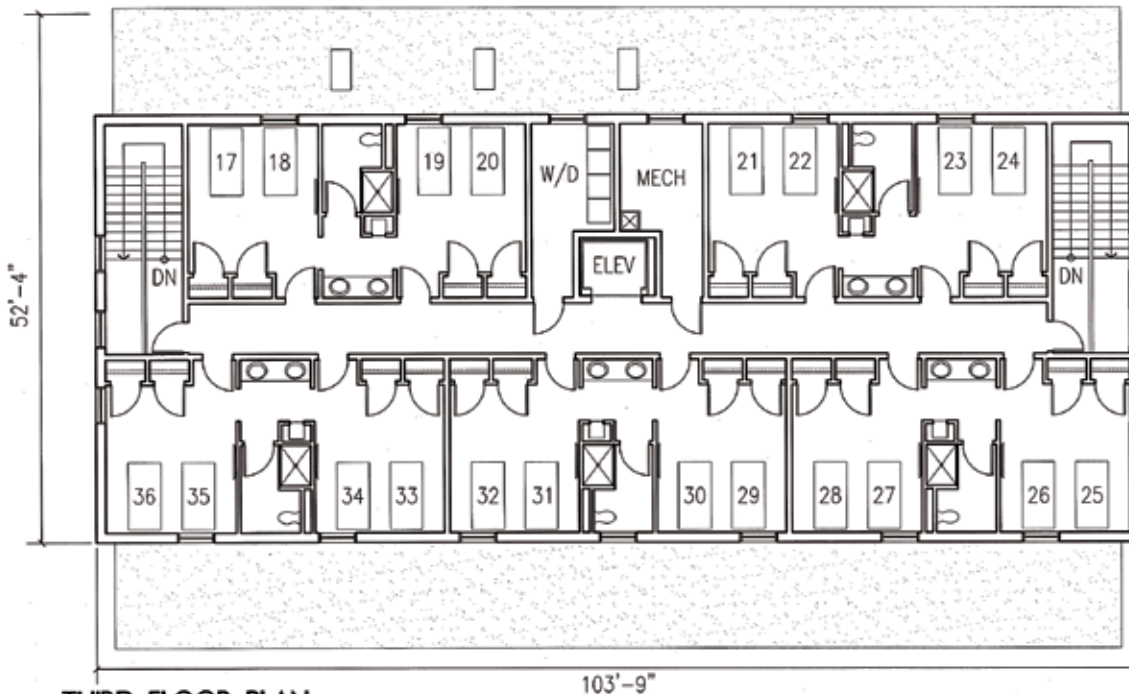
OPTION "A"
3 OF 6



THIRD FLOOR PLAN

SCALE: 1/8" = 1'-0"

OPTION "B"
3 OF 6



THIRD FLOOR PLAN

SCALE: 1/8" = 1'-0"

PROJECT HIGHLIGHTS

HOUSING HIGHLIGHTS

Beta-Nu's goal is to build one of the premiere chapter houses on the campus that is a living-learning environment befitting 2015 and beyond. The \$5.0 million house will include the following (note: we are still coordinating with architects to match our facility vision with the floor plans):

- Great "Curb Appeal"
- A Grand Entry Lobby
- 9-4 Man Suites with Bedrooms, Study and Bathrooms
- On-Site Resident Advisor/Property Manager Suite
- Chapter Room/Library
- First Class Kitchen and Dining Room
- Alumni/Heritage Room
- Chapter Office
- Career & Leadership Center
- Equipment/Storage Room
- Laundry & Vending
- TV & Small Living Room
- Multi-Purpose/Social Room
- Card Access Entry & Security Throughout
- Air Conditioning, Heating and Fire Safety
- All the Latest Technology



The Kappa Sig house is being built near the Greek Steps.

Endowments

Beta-Nu's short-term goal is a \$250,000 endowment and long-term goal is a \$1.7 million endowment to help fund the following:

- Scholarships for studying abroad, going to grad school, academic & leadership success, and ritual proficiency.
- Sending undergraduates to Kappa Sigma, University and other leadership conferences.
- Career preparation materials and programs.
- A faculty advisor to focus on academic and career advice.



How we will succeed long-term

Volunteerism - Beta-Nu will be as successful as the commitment of our alumni and parent volunteers. A strategic partnership between our Advisory Board, Alumni Association Board, and Housing Corporation will provide the guidance our young men need.

Leadership Development - Beta-Nu's goal is to build better men. By fostering an environment that expects members to be involved on campus and in the chapter, by sending members to leadership conferences, providing career preparation programs & internships, we will prepare our members for their future success.

Higher Standards - Beta-Nu must set high standards to excel on the campus of today. We will expect members to strive for a GPA of the All-Men's Average or higher; to be ritually proficient; to be involved on campus & in the chapter; to provide 25 hours or more of service annually; and of course to be financially current with the chapter.

Why We Support the Campaign

Reed Hume '55

"It is hard to imagine being in my 80th year without the memories and friendships formed over 60 years ago at 460 Hilltop, but it was more than brick and mortar. There was a fraternal bond that brought us together to make us "brothers in heart through life" and indeed survives to this day. It is doubtful that this bond could have been so strong or remained through all these decades without the meals, the pranks, the partying and yes even the occasional studying that took place at 460. Those who follow deserve the same opportunities."

Gerald Nichols '55

"Many of the experiences gained as a Kappa Sig have helped me through life."

Bill Leavell '72

"The Kappa Sig experience provided me with a fine social entre" into many fun times. I still maintain many friendships that originated at 460 Hilltop."

Paul "Bo" Bollinger '75

"If success in life is measured by the number of good friends you have then Kappa Sigma was like going to the bank at UK. The great memories I have of my Beta-Nu brothers from intramurals to road trips have served to create a bond that has lasted forever. Meeting other KE brothers in business and life is like a gift that keeps on paying dividends. We now need to create a home for future Beta-Nu brothers to learn and pass the torch of brotherhood to a few good men."

Gary Ulmer '76

"My Kappa Sigma experience has resulted in life-time friendships, a common bond with all from the Beta-Nu Chapter and many fond memories. I want future members of Beta-Nu to be able to benefit from the brotherhood experience."

Michael Gray '77

"I have memories with my Beta-Nu brothers that are unlike any others that I own. When these stories are shared with other brothers, whether older or younger, there is an understanding that only comes with the bond of fraternity."

Mic Wilson '78

"The day that I accepted a bid to join Kappa Sigma Fraternity at the University of Kentucky shaped the man that I am today. My faith, the marriage to my wife, the birth of my son and

my initiation into the Beta-Nu Chapter of Kappa Sigma are the most significant moments in my life. It is so important that we build this chapter house so that we have a place to gather when we return to campus as alumni and so that we leave this precious gift we have all experienced to future generations of students at the University of Kentucky."

Scott Shirley '85

"Any Beta-Nu alumni certainly carries with them fond memories of events, faces, and many good times shared. But, the years shared at the old lodge go well beyond just the memories - they shaped us into who we are today: how we interact with others, how we value teamwork, how willing we are to sacrifice for others, how we choose to lead, etc. Those of us with the benefit of hindsight to help us realize how valuable our Kappa Sigma experiences have been should recognize the importance of supporting this campaign for the benefit of brothers to come."

Jeremy Bates '90

"Kappa Sigma played a key role in preparing me for my future after college. The Fraternity helped develop skills that laid a great foundation for me and as I look back, the House was central to all of it! I can't imagine my time as a Beta-Nu Kappa Sig without the House, so for me that is why this campaign is so important."

Travis Frick '95

"Giving back is overused in our society today as a means to motivate and generate a sense of charity among donors. But in the case of Beta-Nu and our mission to build a house that represents our Chapter's rich history and excellence, this campaign is truly a means of how we can give back to our 114 year old institution. The chapter and future brothers deserve your support!"

Nathan Stein '99

"When I think of the University of Kentucky my fondest memories are only of my Beta-Nu brotherhood. The men of Kappa Sigma polished my character as a man and prepared me to be successful in the world. The bond of brotherhood is undying and I want to ensure that this experience is forever available to shape the men of the University of Kentucky for years to come."

Eric Wolfe '00

"Being a Kappa Sigma is an honor. One of the only things in which I take more pride than being a Kappa Sigma is being a Beta-Nu. Taking the

Kappa Sigma house away from the student body at the University of Kentucky was as damaging as if they had taken away Memorial Coliseum. It's time we reclaimed our rightful place at the top of the Greek system at UK"

Kenny Coleman '02

"Initiating into Beta-Nu embarked a pinnacle moment in my life. I couldn't have known the friendships made here would stand the test of time and become the ones I cherish most of all. More than a decade has passed since graduation, but when we all get together it's like nothing changed. With every story told, The Lodge becomes the centerpiece. The greatest memories we have together took place there. I can't imagine my college years without 460 Hilltop, sticky floors, broken doors and all. I have committed myself to being an active member of this campaign because I feel indebted to what Beta-Nu has given to me. I feel a responsibility to give the next generation of Beta-Nu Brothers the same experience. A Thousandfold!"

Brandon Cramer '03

"My time as a Beta-Nu at the University of Kentucky, without a doubt, helped to shape the man I am today. As an out-of-state student, with very few pre-existing friends on campus, the Brothers of Kappa Sigma provided a welcoming environment and one in which hard work, honor, and personal relationships were valued. I carry many of the lessons, friendships and memories that were created during my time on-campus with me still today. The network of Brothers that I built as an active member of the fraternity is far-reaching and irreplaceable."

Jacob Gammon '07

"I'm indebted to the Chapter for aiding in my development as a student, and a young man – professionally and socially. Let's give the coming generations the same opportunities by ensuring the success of Beta Nu."

Taylor Pierce '07

"I'm a product of my undergraduate experience with Kappa Sigma at UK. I developed professional skills through leadership positions within the fraternity and built life-long friendships with fellow brothers. We are fortunate to associate ourselves with such a strong organization, but the chapter is in need of our help. With your support, we can ensure continued success at Beta-Nu."

**BETA-NU
MEMORY
BANK**



MEMORY BANK



GIVING OPTIONS

HOW TO CONTRIBUTE

All pledges and tax-deductible gifts can be paid either at one-time, over a 5-year period, and/or via an estate/planned gift in special cases. Your donation is a tax-deductible gift to the University of Kentucky for the support of Kappa Sigma Fraternity. The following information provides the most popular ways that alumni, parents, undergraduates, and friends of the Fraternity and University can give *(in all cases please fill out the 3-part pledge form that provides you, the chapter, and university a record, or the online pledge form)*:

METHODS OF CAMPAIGN PLEDGE

ONLINE PLEDGE FORM:

Let us know and we will email you the link.

MAIL PLEDGE FORM:

If you do not have a copy, let us know and we will mail a copy to you.

MAIL:

FMG

Beta-Nu Campaign

5055 E. Broadway Blvd, Suite C-214

Tucson, Arizona 85711

Naming Opportunities

Below is a list of building and educational endowment naming opportunities. Architectural/construction documents will determine the finalized plans.

AREA/ROOM	MINIMUM GIFT
Chapter House	\$1,000,000
Chapter Room/Library	\$500,000
Lounge/Multi-Purpose Room	\$250,000
Front Porch	\$100,000
Kitchen/Serving Area	\$100,000
Dining Room	\$100,000
Foyer/Lobby	\$100,000
Resident Advisor/Property Manager Suite	\$100,000
TV & Living Room	\$75,000
Pillars (8 available)	\$50,000
Alumni/Heritage Room	\$50,000
Chapter Office	\$50,000
Career & Leadership Center/Study Room	\$50,000
Hallways (2)	\$50,000
Officer/Senior Suites (3)	\$50,000
4 Man Suites (6)	\$25,000
Outside Patio/BBQ Area	\$25,000
Laundry & Vending Room	\$25,000
Equipment/Storage Room	\$25,000
Small Corner Porches (2)	\$25,000
Women's Bathroom	\$25,000
Men's Bathroom	\$25,000
Elevator	\$25,000
Brick Paver (2 x 3, will be at least 100)	\$500

Educational Endowments

PROGRAM / SCHOLARSHIP	MINIMUM GIFT
Career & Leadership Program	\$250,000
Faculty Advisor/Career Coach	\$100,000
Leadership Program (unlimited)	\$25,000
Scholarships (unlimited)	\$10,000

GIVING LEVEL RECOGNITION

Donors will be recognized on the Wall of Giving in the Lobby of the Chapter House by Donor Club Level. You will originally be recognized on this wall based on your 5-year pledge commitment to our campaign. However, as your giving increases over a lifetime, we will move you to the giving club that is appropriate.

GIVING LEVEL CLUB	GIFT RANGE	RECOGNITION
Star & Crescent Club	\$500,000 or more	Photo/bio in the lobby, name on named rooms plaque in lobby, choice of room naming, name on Wall of Giving, brick paver and listed on donor list in e-news, newsletters & website
Bologna Club	\$250,000-\$499,999	Choice of room naming, name on named rooms plaque in lobby, name on Wall of Giving, brick paver, and listed on donor list in e-news, newsletters & website
Emerald Club	\$100,000-\$249,999	Choice of room naming, name on named rooms plaque in lobby, name on Wall of Giving, brick paver, and listed on donor list in e-news, newsletters & website
Scarlet Club	\$50,000-\$99,999	Choice of room naming, name on named rooms plaque in lobby, name on Wall of Giving, brick paver, and listed on donor list in e-news, newsletters & website
Manuel Chrysoloras Club	\$25,000-\$49,999	Choice of room naming, name on named rooms plaque in lobby, name on Wall of Giving, brick paver, and listed on donor list in e-news, newsletters & website
William Grigsby McCormick Club	\$10,000-\$24,999	Name on Wall of Giving, brick paver and listed on donor list in e-news, newsletters & website
George Miles Arnold Club	\$5,000-\$9,999	Name on Wall of Giving, brick paver and listed on donor list in e-news, newsletters & website
Edmund Law Rogers Club	\$2,500-\$4,999	Name on Wall of Giving, brick paver and listed on donor list in e-news, newsletters & website
Franklin Courtney Nicodemus Club	\$1,000-\$2,499	Name on Wall of Giving, brick paver and listed on donor list in e-news, newsletters & website
Fellowship Club	\$500-\$999	Brick paver and listed on donor list in e-news, newsletters & website
Woodland Avenue Club	\$499 or less	Listed on donor list in e-news, newsletters & website

In addition to your total giving being recognized on the Wall of Giving or naming an area, room, program or scholarship, you will become members of the University of Kentucky giving recognition levels as well as receive the appropriate university recognition:

UNIVERSITY FELLOWS give \$10,000 – \$24,999 in cash or cash equivalent, or put in place a deferred gift of \$50,000 or more.* No University Fellows will be added in the future as the minimum gift required to become a member of the UK Fellows Society is now \$25,000. This is the first modification made to the minimum Fellows membership gift requirement since the program was begun in 1966.

FRANK LEROND MCVEY FELLOWS give \$25,000 – \$49,999 in cash or cash equivalent, or put in place a deferred gift of \$125,000 or more. Alumni and friends may be recognized as McVey Fellows. This new minimum for Fellows

recognition was established to correlate with the University's endowment funding minimums.

HENRY STITES BARKER FELLOWS give \$50,000 – \$99,999 in cash or cash equivalent, or set up a deferred gift of \$250,000 or more. Recognition of corporations, foundations, trusts and organizations begins at this level.

FRANK G. DICKEY FELLOWS give \$100,000 – \$249,999 in cash or cash equivalent, or put in place a deferred gift of \$500,000 or more.

JOHN BRYAN BOWMAN FELLOWS give \$250,000 – \$499,999 in cash or cash

equivalent, or put in place a deferred gift of \$1,250,000 or more.

JAMES KENNEDY PATTERSON FELLOWS give \$500,000 – \$999,999 in cash or cash equivalent, or put in place a deferred gift of \$2,500,000 or more.

PRESIDENTIAL FELLOWS give \$1,000,000 – \$4,999,999 in cash or cash equivalent, or put in place a deferred gift of \$5,000,000 or more.

COMMONWEALTH FELLOWS give \$5,000,000 or more in cash or cash equivalent, or put in place a deferred gift of \$25,000,000 or more.

*See next page for deferred options.

Thinking outside the box...

As the world around us changes and we try to stay abreast of all the new technological advances being thrown our way, we decided to weigh our options and provide you a list of some old and some new avenues you can utilize to make a donation and help us reach our campaign goal.

CREDIT CARD - Make a gift on UK's secure Online Giving site.

CHECK - Mail as noted on page 14. Once we record the gift we will mail to the Gift Receiving Office at UK.

STOCKS, BONDS AND MUTUAL FUNDS - Transfer your appreciated assets (stocks, bonds, mutual funds) to UK.

MATCHING GIFTS - Many companies and foundations will double or even triple the value of charitable gifts made by employees and their spouses, board members, and retirees. Check here to see if your company will match your gift: <http://www1.matchinggifts.com/uky/>

MONTHLY BANK DRAFT - Make a gift via a monthly draft from your checking account. To complete the online form: Print, sign and mail to the contact address at the bottom of this page. Please include a blank, voided check.

PAYROLL DEDUCTION - UK employees can make charitable contributions to the University by payroll deduction. To enroll, use this authorization form at <http://www.uky.edu/Development/difference/PayrollForm2010.pdf>

PERSONAL PROPERTY - If you would like to donate personal property to UK, contact Gift and Estate Planning at (859) 257-7886. Some gifts require appraisal or advance approval in order to be accepted. Examples of gifts of property include tickets to athletic events, rare books, art work, computer hardware and software, and laboratory equipment.

REAL ESTATE FOUNDATION - A gift of real estate may be a principal residence or vacation home, a farm, a commercial building, a subdivision lot, or unimproved land. The gift may be the entire property or a fractional interest in the property. UK's Office of Gift and Estate Planning can walk you through the process.

ELECTRONIC TRANSFERS - Note: Wire transfers incur substantial fees. An electronic transfer through the Automated Clearing House Network (or "ACH") is often a more practical option. Notify Nikki Russell at (859) 257-3914 after you have scheduled an electronic transfer. If you are trying to meet a deadline, you might also consider charging your gift to a credit card or mailing a payment through an express carrier. Note that IRS regulations stipulate that contributions sent by private carriers must be dated based on UK's date of receipt, whereas gifts sent through the US Postal Service can be dated based on the postmark date. Learn more here: http://www.uky.edu/Development/difference/plannedgifts/Wire_Transfer_Instructions.pdf

LIFE INCOME GIFT - A life income gift, such as a charitable gift annuity or a charitable remainder unitrust, can provide you and/or your loved ones with an income for the duration of your lives or for a specific number of years. You receive a current income tax deduction as well.

CHARITABLE LEAD TRUST - These trusts can be used to transfer assets to a loved one with a significantly reduced tax liability.

BEQUEST - The most common form of deferred gift to UK is a bequest contained in a person's will or revocable (living) trust.

Life Insurance - When you specify the University of Kentucky as the owner and beneficiary of a paid up policy, the charitable deduction is for the policy's cash surrender value or net premium paid on the policy, whichever is less. UK credits paid up policies at a value approximately equal to the cash surrender value of the policy. If the policy is not fully paid up, credit is equal to the cash surrender value and any subsequent premium payments made through UK during the pledge period. UK may elect to liquidate life insurance policies and evaluates each policy on a case by case basis.

GIFTS OF RETIREMENT - Naming UK as a primary or contingent beneficiary of a retirement plan (e.g. IRA, SEP, 401(k), 403(b), ESOP, etc.) may enable you to make a larger gift than you anticipated because income and estate taxes are not imposed when plan assets are distributed to UK. Your retirement account's plan administrator (the company that manages the account) can help you designate University of Kentucky as a primary or contingent beneficiary on the plan's beneficiary form.

RETAINED LIFE ESTATE IN PROPERTY - You can generate a current income tax deduction by giving a home or farm to UK, while retaining the right to use the property during your lifetime. The property will also be removed from your taxable estate. Contact UK's Office of Gift and Estate Planning to discuss this gift opportunity in more detail.

Campaign Contacts

Fraternity Management Group

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