



PHOENIX
SOCIETY
— THE —
UNIVERSITY
OF CHICAGO



What is the Phoenix Society?

Established by the Board of Trustees in 2000, the Phoenix Society honors individuals who make planned gifts to benefit the University of Chicago. The Trustees' selection of the phoenix as the society's symbol recognizes the vibrant link between the University's history and its future.

What are planned gifts?

Planned gifts combine financial planning, estate planning, and tax planning techniques to enable donors to make gifts of surprising significance. Gifts by will, gift annuities, and charitable trusts allow donors to provide generous future support for the University's mission. Some of these gifts provide income and tax benefits during their lifetimes. All planned gifts provide important ways to strengthen and sustain the University's ongoing spirit of inquiry and exchange.

How do I become a member?

Phoenix Society membership is extended to individuals who make any of the following commitments to the University:

INCLUDE the University in their estate plans;

CREATE a charitable life-income arrangement (a charitable gift annuity or a charitable remainder trust) or a charitable lead trust to benefit the University;

NAME the University as a beneficiary of retirement assets or life insurance; or

DONATE a personal residence or a vacation home to the University and reserve a life estate.

Examples of gifts Phoenix Society members have made include funding research through charitable trusts, creating endowed scholarships with the residuary from charitable gift annuities, and establishing professorships through provisions in estate plans. Equally important are simple bequests from wills or trusts that provide unrestricted funds to the University.

The University's long-term financial stability and leadership could not be sustained without the thoughtful intentions of planned giving donors. We are pleased to invite you to join this distinguished society.

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Who are Phoenix Society members?

Since inception, the Phoenix Society has welcomed more than 1,882 members and continues to grow, with 1,444 active members as of October 2014. Through their thoughtful intentions, this expanding community of individuals has shown foresight and commitment to the future of the University and its students, faculty, resources, and facilities.

Phoenix Society members live all over the world and represent each of the University's schools and divisions, reflecting the diversity of the University of Chicago and its programs. In addition to many alumni of the University, the Phoenix Society includes individuals who have received the benefit of Chicago's medical care, faithful patrons of its cultural institutions, such as the Oriental Institute and the Smart Museum of Art, and Chicagoans committed to the continued development and maintenance of the city's South Side community.

What are the benefits of membership?

The Phoenix Society offers members:

- » a special memento;
- » complimentary admission to University Harper Lectures across the globe, where leading Chicago faculty share current teaching and research;
- » invitations to exclusive University events, both on campus and in cities around the country; and
- » recognition in an annual Honor Roll and in University publications (unless anonymity is requested) and at special recognition events.

Members also receive ongoing personalized gift planning services from the University's planned giving professionals.

Making a planned gift to the University isn't just about funding a gift annuity or establishing a charitable trust. It's an investment in the future—the University's and your own.

For more information about the Phoenix Society, please contact Brenda Lee Johnson, Marketing Manager in the Office of Gift Planning at 773.834.8506 or visit alumniandfriends.uchicago.edu/phoenixsociety.



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