

# COMMON LOYALTY

A campaign to forge  
uncommon leaders





# BOUND BY OUR COMMON LOYALTY...

I believe that the ideal chapter is made up of men

Who are bound together in a common loyalty  
which transcends any personal selfishness;

Who realize that membership means personal responsibility  
in bearing their share of the financial burden  
of the chapter and the national organization;

Who bring credit to the fraternity by striving to attain  
the highest possible standards of scholarship;

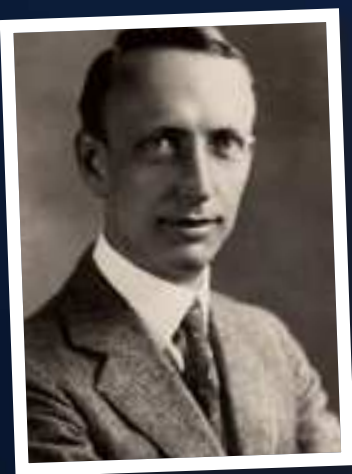
Who safeguard the reputation of their chapter  
by keeping careful watch over their personal conduct;

Who uphold faithfully the traditions and activities  
of their college;

Who prepare themselves diligently to shoulder their  
full responsibility as citizens.

I believe that my chapter can become an ideal chapter,  
and I shall do my share to make it so.

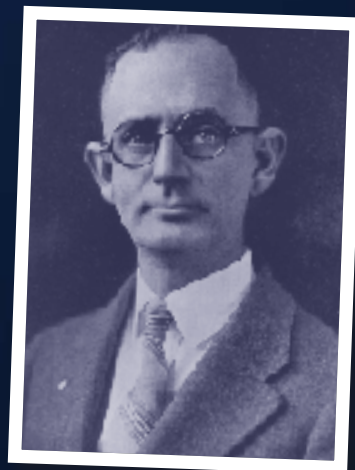
...We are leading the charge to forge tens  
of thousands of young men each year into  
uncommon leaders, men who possess  
the skills necessary to transform society.



*Simon Fogart.*



*Andrew Kroeg.*



*Harry Mixson.*

# OUR UNCOMMON STORY

We believe that every young man can become an authentic leader. Leadership is the ability to influence, maximizing the efforts of others, towards the achievement of a goal.

As you will recall, in 1904, three uncommon men – Andrew Kroeg, Simon Fogarty, and Harry Mixson set a goal... they **chose to lead**. These men began their own fraternity in Charleston...and it quickly grew. By 1909, there were chapters coast to coast; their decision to lead evolved into a national fraternity.

With its roots in a simple premise – the commitment to leadership by choice – Pi Kappa Phi Fraternity has evolved into a brotherhood of over 113,000 members...232 charters in 41 states and the District of Columbia.

Originally coined as the “non-fraternity” established to challenge the status quo, our history is ripe with examples of uncommon men making uncommon sacrifices to create an uncommon fraternity. From its humble beginnings over a century ago, Pi Kappa Phi was founded on the premise of creating leadership opportunities for our members.

Leadership is the very root of our organization, and it is the concept of leadership that shall guide us to our future. Our membership on college campuses has nearly doubled since 2004, from 5,400 to 10,000 and growing. Today's quest is to expand our leadership, scholarship, and service programs to grow leaders who know how to use their gifts and passions to serve the world around them. This quest to develop uncommon leaders will also shine a spotlight on the Pi Kappa Phi Fraternity - as a leader in the fraternal world.

*Today, more than ever, our society needs an infusion of leaders - will you help lead the charge? Let's forge ahead, looking at our plan to shape tomorrow's leaders.*

Our membership on college campuses has nearly doubled since 2004, from 5,400 to 10,000 and growing.

OUR MISSION  
WE WILL LEAD



A Venn diagram consisting of three overlapping circles arranged in a triangle. The top circle is labeled 'LEADERSHIP', the bottom-left circle is labeled 'SCHOLARSHIP', and the bottom-right circle is labeled 'SERVICE'. The central area where all three circles overlap is labeled 'CIRCLE OF LEARNING'. The circles are a medium blue color, and the background is a darker blue.

LEADERSHIP

CIRCLE  
OF  
LEARNING

SCHOLARSHIP

SERVICE



# UNCOMMON EXPERIENCES


Our society is changing at a rapid pace. Young men are growing up in a very different world from that of our generation and those long past. To equip them for adulthood and leadership, we have to focus on the resources, experiences, and opportunities necessary to prepare them to lead the way in an uncertain world. Shaping leaders, who know how to solve problems, communicate, and serve people is imperative.

Our approach to forging uncommon leaders is what we call the Virtuous Circle of Learning...an intertwining of our key programs: leadership, scholarship, and service. Embedded in the heart of each program are our core values of virtue - moral character, integrity, empathy, and courage.

Great leaders have the ability to influence. Our opportunity to influence the next generation of Pi Kappa Phi leaders is NOW, by...

- ★ Strengthening innovative leadership development and training programs
- ★ Increasing support to foster and recognize scholastic success
- ★ Inspiring signature servant leadership experiences



A young man with light brown hair, wearing a dark blue suit, white shirt, and yellow patterned tie, is speaking at a wooden podium. He has his right hand raised with fingers spread. The podium features a plaque with the Texas State University logo and the text "TEXAS STATE UNIVERSITY SAN MARCOS". A dark blue semi-transparent box with a diagonal cutout is overlaid on the left side of the image, containing a quote and the speaker's name.

"I loved Pi Kapp College and am a huge advocate. It was one of my first thorough leadership conferences and experiences. The leadership exercises were self-motivating lessons on ethics, integrity, passion, sacrifice, and service. Pi Kapp College helped transform me as a leader. Taking lessons I learned as an associate member and breaking them down in a practical way...this is what it means to be a leader."

- Nathan McDaniel, Eta Rho (Texas State)

**Nathan McDaniel, Eta Rho (Texas State)**

**Hometown:** Keller, TX

**Major:** Political Science

**Archon and Warden**

**Texas State Student Body President**

**Pi Kapp College Graduate**



# LEADERSHIP DEVELOPMENT

We believe everyone has the potential to be a leader, in the business world, and on the home front. As the Fraternity continues to grow, we plan to expand, enhance, and create comprehensive programs that promote healthy leadership and character development in the next generation. Our strategy is three-fold:

## Expand Pi Kapp College

Pi Kapp College is a transformational, six-day leadership development experience for emerging chapter leaders. Through character-based leadership training, students are equipped and empowered to create a healthy fraternity chapter. The weeklong summer program inspires participants to believe they can be effective leaders - and leaves them feeling passionate about fulfilling a leadership role. Through team huddles, students learn to interact with each other over relevant chapter leadership issues they can immediately apply. When they walk away from Pi Kapp College they have a game plan to continue growing as a leader, and the tools to help others in the Fraternity do the same.

Pi Kapp College has proven to be one of the Fraternity's most impactful — and most enduring — leadership experiences. Nearly three quarters of all Pi Kapp College graduates have gone on to hold leadership positions in their chapters or campus communities.

Pi Kapp College currently offers two sessions during the summer. The Pi Kapp College experience begins in Charlotte, N.C. at the Kelley A. Bergstrom Leadership Center. The majority of the program takes place at the Sigma Chapter house at the University of South Carolina in Columbia, S.C.

## Expansion of the program will allow us to...

- ★ Increase participation from \_\_\_ to \_\_\_ students per session
- ★ Develop new curriculum based on experiential learning including images, drama, interviews, video, interactive games, and music
- ★ Improve facilitator recruitment and training
- ★ Ensure the continuation and expansion of Pi Kapp College for more students in the future

100% of Pi Kapp College participants reported that confidence in their leadership skills had increased, as had their ability to define their leadership strengths and areas for growth.



**Logan Patrick, Delta (Furman)**

**Hometown:** Biloxi, MS

**Major:** Business Administration and Management

**Archon**

**Pi Kapp College**

**Order of the Lamp**



"Patience is the most valuable quality I learned from my leadership experience, one that will serve me after graduation. It takes a lot of patience to be a leader. When you have seventy guys that you're not only trying to work and co-operate with, but you're also trying to be friends with...that takes a lot of patience. Learning that it's a team effort, it's not just you...to get results, you have to be patient, willing to co-operate, and accept others' suggestions as well as their criticisms."

*- Logan Patrick, Delta (Furman)*

# LEADERSHIP DEVELOPMENT

## Enhance the Mid-Year Leadership Conference

Every year, new chapter officers participate in our Mid-Year Leadership Conference, a highly rated officer training and leadership seminar. One defining element of the conference is its underlying scientific framework.

Built on the Social Change Model of Leadership Development created by the Higher Education Research Institute at UCLA, our programs emphasize personal awareness, underscoring the fact that the capacity to create change comes through an understanding of one's own talents, values, interests, and leadership competence.

Currently, 1400 students participate in the 3-day conference at four regional sites. As the Fraternity continues to grow, by 2020, we hope to expand this annual event to accommodate X students attending in five cities around the country.



### Additional funding will help...

- ★ Increase capacity
- ★ Improve accessibility
- ★ Reduce enrollment costs for students
- ★ Improve conference quality by adding top-tier speakers
- ★ Provide students with leadership toolkits such as books, CDs, and online learning materials to take back to their chapters students in the future

Leading, in part, means keeping up with the times. Technology has become an essential ingredient to learning to lead. With the influx of exciting learning and motivational platforms available today – technologies such as TED Talks and other “ideas worth spreading” – adequate funding is vital; it ensures Pi Kappa Phi’s leadership programming is set up to take advantage of cost-effective and efficient training methods.





**Wayne Unger, Theta Xi (Arizona State)**

**Hometown:** Phoenix, AZ

**Major:** Supply Chain Management

**Archon – Council of Archons**

**Arizona State Student Body President**

**Pi Kapp College Graduate**

“The thing that has had the greatest impact on me during my PKP experience is the people...the men of my chapter, the men of our fraternity across this great nation who have changed, molded, and shaped my life into what it is today...men who have inspired me to reach my potential, to constantly better myself, and to challenge the status quo while striving for excellence.”

– Wayne Unger, Theta Xi (Arizona State)



# LEADERSHIP DEVELOPMENT

## Vision 2020 Fund

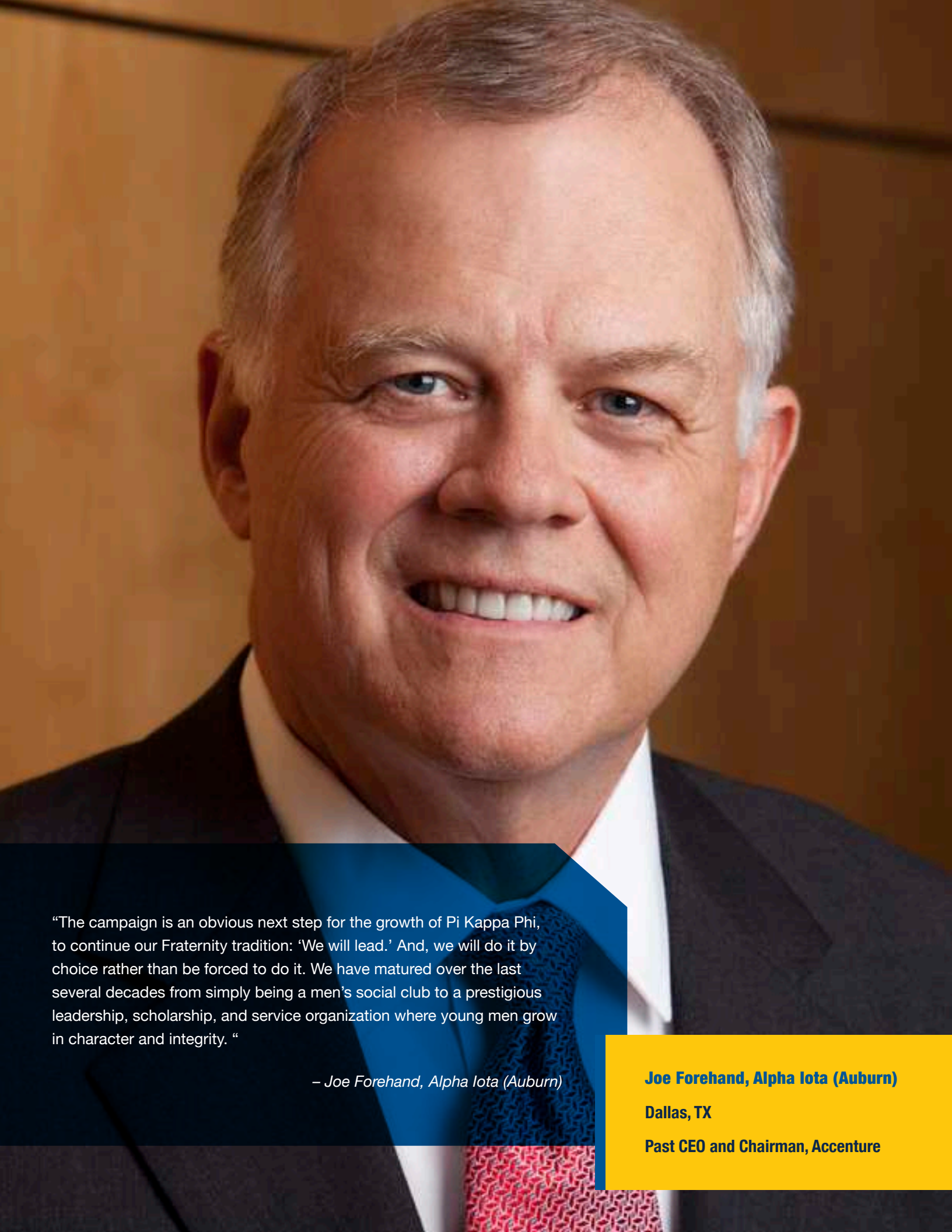
To boldly go where no uncommon leader has ever gone requires forward thinking. Our Vision 2020 fund, allows the Fraternity to design and implement programs to meet unanticipated future needs. Programs that can be deployed quickly will ensure our students have a competitive edge, and position Pi Kappa Phi in the forefront among fraternities.



The Vision 2020 Fund, named for our National Council's strategic vision, will be introduced at the 54th Supreme Chapter in August 2014. It provides a source of funds for the Fraternity to develop and test new educational efforts, initiatives, and tactics that more effectively support its experiential learning mission.

We live in the age of "the brain economy." This fund will allow for new program innovation, such as entrepreneurial leadership, venture philanthropy, and other emerging initiatives...all with the end goal of defining and sharpening personal leadership skills.





“The campaign is an obvious next step for the growth of Pi Kappa Phi, to continue our Fraternity tradition: ‘We will lead.’ And, we will do it by choice rather than be forced to do it. We have matured over the last several decades from simply being a men’s social club to a prestigious leadership, scholarship, and service organization where young men grow in character and integrity. “

– Joe Forehand, Alpha Iota (Auburn)

**Joe Forehand, Alpha Iota (Auburn)**

**Dallas, TX**

**Past CEO and Chairman, Accenture**

**William Furling, Epsilon Mu (Bradley)**

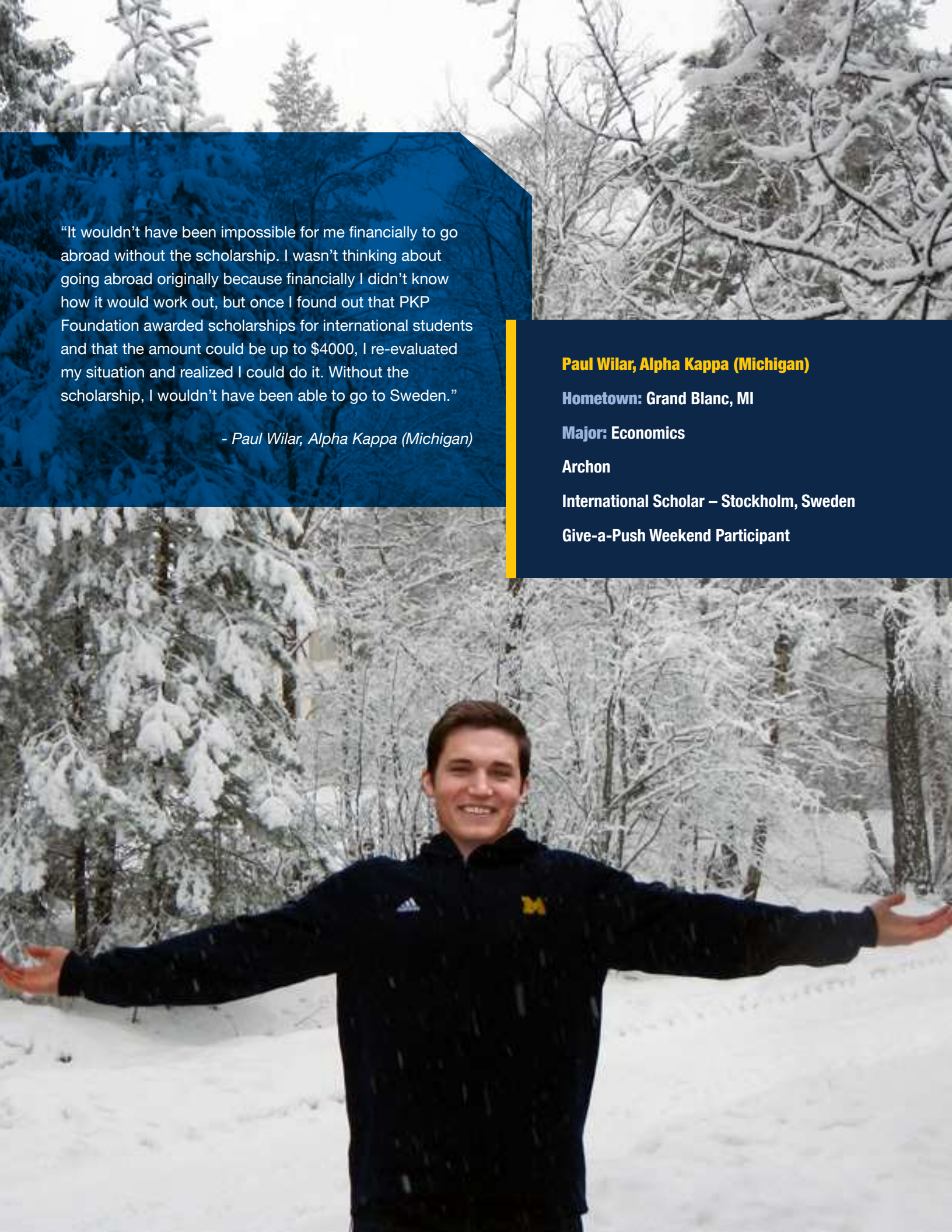
**Springfield, IL**

**Entrepreneur**

“During my Pi Kapp undergraduate years, I took on leadership roles that stretched me and helped me to grow and mature. Being chapter treasurer, handling an organization’s money, taught me the value of responsibility and accountability. And that significant experience changed me from a follower into a confident leader. My philanthropy experience as an undergraduate with Push America was humbling; it really opened my eyes, and expanded my understanding about the struggles of people with disabilities.”

– William Furling, Epsilon Mu (Bradley)





“It wouldn’t have been impossible for me financially to go abroad without the scholarship. I wasn’t thinking about going abroad originally because financially I didn’t know how it would work out, but once I found out that PKP Foundation awarded scholarships for international students and that the amount could be up to \$4000, I re-evaluated my situation and realized I could do it. Without the scholarship, I wouldn’t have been able to go to Sweden.”

- Paul Wilar, Alpha Kappa (Michigan)

**Paul Wilar, Alpha Kappa (Michigan)**

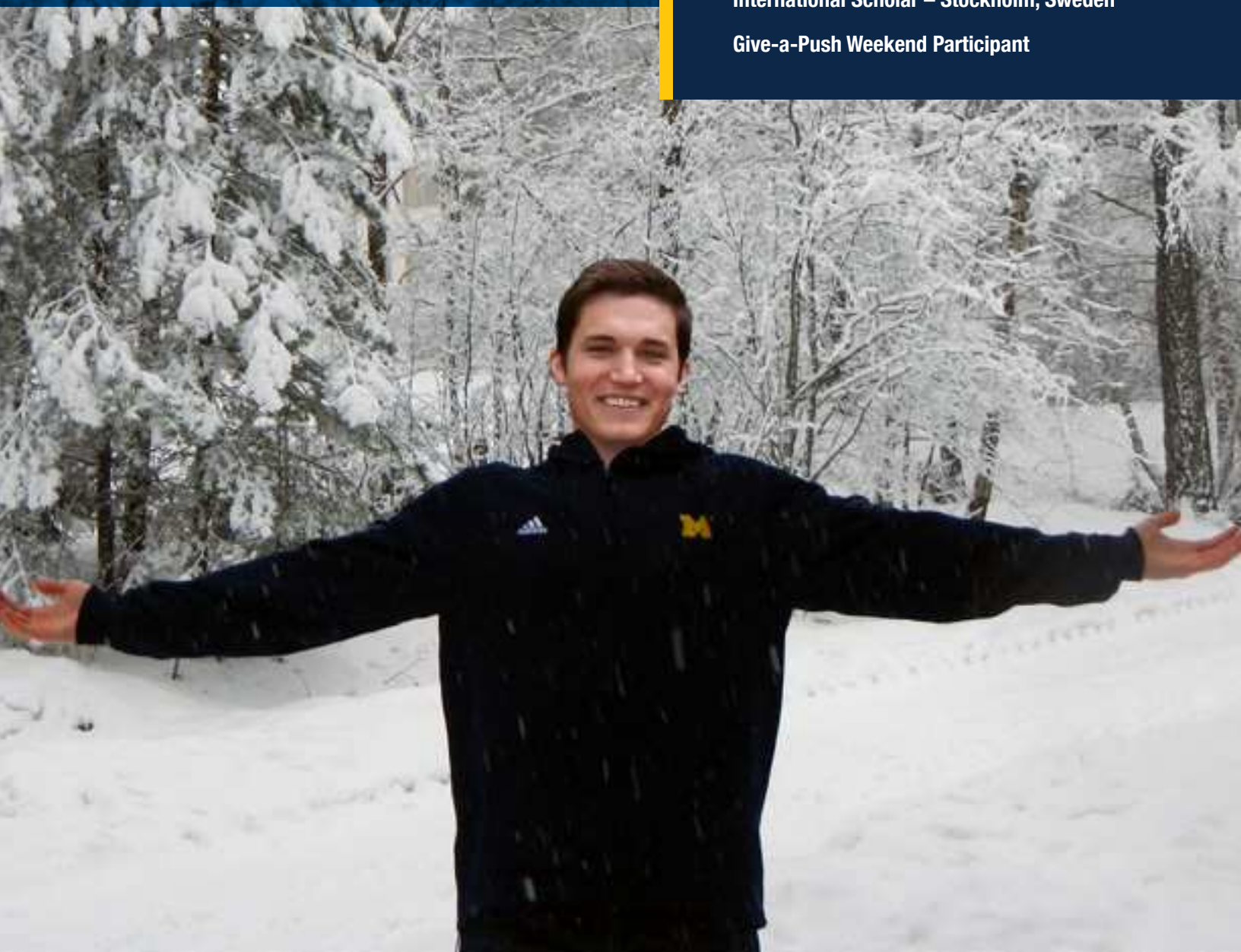
**Hometown:** Grand Blanc, MI

**Major:** Economics

**Archon**

**International Scholar – Stockholm, Sweden**

**Give-a-Push Weekend Participant**



# SCHOLARSHIP RECOGNITION

We believe that authentic leaders commit to excellence, and as a Fraternity we need to recognize scholastic achievers. As the Fraternity continues to grow, it is essential to grow our scholarship funds and reward our student scholastic leaders.

Our current academic development program honors academic excellence and awards a number of merit-based scholarships to deserving Pi Kapps. Our scholarship programs include the following:

**The International Scholars Program** assists students with funding to study abroad. It is a merit-based scholarship based on demonstrated leadership experience and scholastic achievement. Today, the scholarship provides funds for 7 to 10 students ranging from a \$500 to \$4,000 award to study abroad. We want to increase this to 14 to 20 students, and add a leadership-learning component through which students communicate with each other via Skype to share experiences.

**The Pi Kapp Scholars Program** is a merit-based scholarship for juniors and seniors. Today, between 12 and 24 students are awarded with a \$500 - \$1,000 scholarship. We want to increase this to 48 deserving students.

**Recruitment Scholarships** help chapters identify and recruit the top incoming freshman on their campuses. This new initiative will allow Pi Kappa Phi chapters to offer one \$500 recruitment scholarship and stay competitive with other fraternities on campus.







“Pi Kappa Phi was vital to me as a student because of the well-rounded social experience and skills it provided – leadership with my peers, teamwork, living in community, problem solving, governance, networking...things I could not get in the college classroom. Pi Kappa Phi was an extraordinary complement to the technical material I studied. The Fraternity inspired my new mindset of service to others both as a mentor and working with my peers.”

– Adm. Ronald Zlatoper, Alpha Tau (Rensselaer Poly)

**Adm. Ronald Zlatoper, Alpha Tau (Rensselaer Poly)**  
Honolulu, HI  
Past Commander and Chief of the Pacific Fleet, U.S. Navy



**Brooks Bradford, Delta Omega (Texas A&M)**

**Houston, TX**

**President, AIMM Technologies**

“I’m excited about the campaign because it gives Pi Kappa Phi undergraduates the opportunity to collectively build a successful national fraternity. Pi Kapp College gives our men a realistic picture of the challenges and rewards of leadership. My own involvement in Pi Kappa Phi campus activities helped me to understand the art of effective communication, which has helped me professionally and personally.”

*– Brooks Bradford, Delta Omega (Texas A&M)*



**Axel Holm, Alpha Omicron (Iowa State)**

**Hometown:** Batavia, IL

**Major:** Landscape Architecture

**Chaplain and Standards Board Chairman**

**Journey of Hope Crew Member**

**Build America Project Manager**

“Pi Kappa Phi has so many opportunities it’s ridiculous...all the leadership possibilities. Push America is what Pi Kappa Phi is to me. The opportunity to go across the country and work with people with disabilities is the most humbling experience ever. I wish everyone in the world could experience it as it opens up your mind.”

- Axel Holm, Alpha Omicron (Iowa State)

# SERVANT-LEADERSHIP EXPERIENCES

We believe authentic leadership is about serving and influencing others for the greater good. Through Push America, we provide students with life-giving servant-leadership experiences. Some of these experiences include the following:

The Journey of Hope is the largest fraternal fundraising and awareness event of its kind. The 4,100-mile coast-to-coast bicycle journey was established to deliver a message to the nation, one of acceptance and understanding for people with disabilities.

The Journey of Hope reaches out to people through newspapers, radio, television, and civic groups and community leaders, reaching millions of people annually and bringing to the forefront the abilities of people with disabilities. From the inaugural team of 21 team members raising \$20,000, the team has since been expanded into three different routes of 35 Pi Kappa Phi members, and annually raises more than \$500,000.

Give-A-Push Weekends offer a point of entry for what the Pi Kappa Phi servant-leadership training is all about. Give-A-Push Weekends are national service projects that provide funding and manpower to build and renovate structures for camps and facilities serving the disability community. Members of Pi Kappa Phi Fraternity from various universities construct accessible fishing piers, boardwalks, pavilions, playgrounds, and more. The camps introduce students to serving people with disabilities, and for many, it is their first interaction with the disabled. These experiences have such a strong impact that many students are inspired to get involved in a more substantial, long-term way, doing valuable work in the area of service, philanthropy, and social and corporate responsibility.

Push Camps are week-long national service projects geared toward making recreational environments more accessible. Whether it is building accessible amenities at a camp, or embarking on an adaptive sports adventure, Push Camps enable and promote outdoor recreation for people with disabilities. Typically associated with spring break, members of the Pi Kappa Phi Fraternity gather for hard work, brotherhood, and hands on interaction. Push Camps are responsible for breaking the stereotype of what is thought possible...and they provide a way to witness true human ability



# Greatest Service Movement Ever

"In over 40 years of service to people with disabilities, the work of Pi Kappa Phi and Push America is viewed by our Easter Seal Camping and Recreation Council as the greatest service movement by a College Fraternal Organization ever attempted and accomplished. It is, far and away, one of the most positive movements we have ever experienced – almost 100,000 children and adults with disabilities benefit from this movement each year."

*– Jerry Bynum, for Camp ASCCA Administrator  
(Alabama's Special Camp for Children and Adults)*



# SERVANT-LEADERSHIP EXPERIENCES

These real life leadership and service experiences teach Pi Kappa Phi students the value of true empathy versus feeling uncomfortable and staying distant from disabled people. The act of coming together and accomplishing something significant showcases the valuable elements of teamwork and fraternal relationships.

For many with disabilities, interaction with people outside their families and caregivers is a unique experience. Hundreds of letters attest to how appreciated the camps are by those being served.

We now have more students interested in participating in these programs than current resources can support. Today, the programs enable 350 students to participate. An investment in our campaign will allow us to give over 500 students and young alumni members the opportunity to participate in a life-changing servant-leadership experience.



Push America was founded in 1977 as the national philanthropy of Pi Kappa Phi Fraternity with the purpose of instilling lifelong service in its members, and enhancing the quality of life for people with disabilities. Push America has grown into a nationally recognized nonprofit with numerous programs educating undergraduates, alumni, and communities about the abilities of people with disabilities.

## Mission:

Building leaders of tomorrow by serving people with disabilities today





# CAMPAIGN VISION

We see tens of thousands of uncommon men leading in their homes, neighborhoods, communities, and businesses. We see model citizens across the country serving people and solving problems throughout the world. We see citizen servants and extraordinary leaders transforming society. We see our Fraternity as a catalyst to ignite a leadership movement among young people. We see our quest to send forth uncommon leaders bound by a common loyalty.

# WE SEE



PI KAPPA PHI.

# UNCOMMON COMMITMENT

## The Importance of Leadership in Giving

As emphasized in a pre-campaign study, experience consistently confirms the importance of leadership gifts. Fundraising data from major capital campaigns for fraternities, colleges, universities, and other nonprofit organizations shows that there exists a definite pattern of giving in nearly all successful campaigns.

### The pattern takes the following form:

1. Fully one-half or more of the amount received will come from those few donors who have the ability to make leadership level gifts, usually as few as one percent of all those who contribute.
2. As much as 85 to 90 percent of the total amount given comes from about 10 to 15 percent of those who contribute.
3. All of the remaining donors ordinarily will provide about 10 to 15 percent of the total that is given.

This fundraising experience provides further evidence that leadership commitments must be exceptionally strong for the campaign to succeed. To achieve the campaign goal, the Pattern of Gifts chart shown opposite indicates the numbers and amounts of gifts needed for ***Common Loyalty. A Campaign to Forge Uncommon Leaders.***

As one of the great character-building organizations of our lives, your participation in this exceptional project is one that will bring rewards to our Fraternity and its members for generations to come. Please consider the weight your decision carries not just for the campaign...for the entire future of Pi Kappa Phi.

## Pattern of Gifts Needed to Support a \$7 Million Capital Campaign

Number of Gifts Needed		In the Range of	Totaling
1		1,000,000	\$1,000,000
1		500,000	\$500,000
2		250,000	\$500,000
6		100,000	\$600,000
10		50,000	\$500,000
20	Leadership Gifts - 4 years		<b>\$3,100,000</b>
11		25,000	\$275,000
15		20,000	\$300,000
35		15,000	\$525,000
		10,000	\$800,000
141	Special Gifts - 4 years		<b>\$1,900,000</b>
1,724	Annual Leadership Fund - 6 years		<b>\$2,000,000</b>
1,885	Gifts		<b>\$7,000,000</b>

# UNCOMMON CALLING

Everything you do matters. As a leader yourself, you know how important it is to contribute to the growth and success of other people. Your investment in this leadership campaign will have an impact not only on the lives of thousands of young Pi Kappa Phi men; it will also profoundly benefit the thousands of lives that will be influenced because of their leadership.

## The Campaign Plan to Forge Uncommon Leaders

To provide the critical resources that are needed to fund the expanded operations and programs, the Fraternity and its Foundation seeks to secure a total of \$7 million in charitable gifts from its members.

To help determine the feasibility of raising the necessary funds, the Foundation asked the respected fundraising consulting firm of Skystone Partners to conduct a comprehensive study of the Fraternity's members.

- ★ Results of the study indicated that, for Pi Kappa Phi to raise as much as \$7 million, it will be dependent on the gifts of a very small number of members who have the capacity and interest to consider making pledges in the range of \$100,000 and above.
- ★ Recognizing the critical role these leadership contributions would make in meeting such a campaign challenge, the Foundation's Board of Directors approved a plan to first approach this small circle of individuals and solicit their support.
- ★ Following this initial action, the Campaign Cabinet will then seek additional leadership gift commitments from a number of other brothers who have the capacity to consider making high five- and six-figure campaign gifts. In turn, their generosity will be influenced and inspired by the leadership donors who have paved the way.
- ★ There are hundreds of brothers throughout Pi Kappa Phi's broad domain who have had an important role in shaping the Fraternity's development in recent years. These men will be actively engaged in this effort through a series of area campaigns that will be carried out over a twenty-four month period. Area campaign chairs and their committee members will be seeking gifts and multi-year pledges in the range of \$10,000 to \$50,000 from hundreds of loyal and committed Pi Kappa Phi alumni to move the campaign close to its final goal.
- ★ Starting in late 2014 and continuing through the Fraternity's Centennial celebration in 2016, the campaign will launch a broad-based appeal to our full membership. Every Pi Kappa Phi alumni will be invited to add his support to the total raised and help lift the overall effort to a \$7 million success.





# UNCOMMON INVESTMENT

## Methods of Giving

Choose to lead. This has been the path to remarkable success on college campuses across the Nation for Pi Kappa Phi. As individuals, we step up to lead. As brothers, we lead together, with a common purpose. A leadership gift to Common Loyalty: A Campaign to Forge Uncommon Leaders ensures that those who are following in your Phi Kappa Phi footsteps will be equipped with life-long leadership skills to build a stronger America



## Planning Your Gift

All gifts to support A Campaign to Forge Uncommon Leaders are paid to and carefully managed by the Pi Kappa Phi Foundation, which is recognized by the IRS as a 501(c)(3) charitable foundation.

There are many options available for contributing, depending on your circumstances and the nature of your gift.

## The Foundation Staff Can Help You

The Pi Kappa Phi Foundation staff can assist if you have questions. We are pleased to work with you and your tax advisors to design a gift plan structured to best reflect your philanthropic and financial goals.

## Cash Gifts and Pledges

Current gifts and structured pledges are particularly helpful because they can be put to work immediately to help fund the campaign's priority objectives. For taxpayers who itemize income tax deductions, cash gifts are deductible in the year paid. Pledges can be extended over a period of as long as five years, whatever best accommodates the donor's personal circumstances.

Federal tax law allows you to deduct the full value of such gifts; deductions are allowed up to 50 percent of your adjusted gross income. Excess deductions can be carried forward and used for up to five additional years.

## Marketable Securities

Gifts of securities traded on an exchange or other public market offer more advantages than cash gifts. If the securities have appreciated since they were purchased, there is a double benefit: the full market value (the mean between the high and low on the date of transfer) is tax deductible, and the donor does not pay capital gain taxes on the appreciation.

## Closely Held Securities

You can deduct the full fair market value of your gift of closely held securities, as determined by appraisal, without realizing a capital gain tax. Special laws govern this type of gift and the Foundation's staff, and your tax or legal advisors can discuss current regulations with you.

## Appreciated Property

Many donors make gifts of long-term appreciated capital gain property – such as securities or real estate. This type of gift allows you to claim a charitable deduction based on the property's full fair market value. You pay no capital gain tax on the appreciation of the asset. Such gifts generally allow donors to deduct more than they paid for the asset. The typical deduction for such gifts is limited to 30 percent of your adjusted gross income, but any excess can be carried forward for up to five additional years.



# UNCOMMON INVESTMENT

## Real Estate

A gift of real estate, especially if it has greatly appreciated in value, offers numerous tax advantages. You may avoid capital gain taxes on the appreciated value and claim an income tax deduction, often for the full fair market value as determined by a qualified appraisal. The Pi Kappa Phi Foundation will consider gifts of land and the rights that issue out of land, and accepts certain gifts of marketable commercial and residential real estate with a value of \$75,000 or more.

An irrevocable gift of a personal residence can include the provision that you will retain the right to full use and enjoyment of your house, farm, or ranch for life. You may wish to consider this kind of gift if the real estate represents only an incidental part of your estate. These gifts qualify for income tax benefits, and allow donors to make a significant gift with almost no out-of-pocket cost.

## Personal and Other Property

The Pi Kappa Phi Foundation welcomes gifts in kind such as equipment, books, art, collections, or software when their uses are related to the educational mission of the Pi Kappa Phi Foundation. Other property such as mortgages, notes, copyrights, trademarks and royalties can also offer unique gift potential.

## Life Insurance

Gifts may be made simply by naming the Pi Kappa Phi Foundation as a primary or other beneficiary under the policy. An irrevocable gift making the Pi Kappa Phi Foundation the owner and beneficiary of the policy qualifies for an income tax charitable deduction for the value of the policy.

## A Charitable Lead Trust

Assets are placed in trust for a period of time, often for 10 to 20 years, or for the life of an individual. Annual amounts from the trust are paid to the Pi Kappa Phi Foundation. At the end of the trust period, the trust assets pass to a non-charitable beneficiary, typically the donor or to next-generation heirs.

You may establish a charitable lead trust in two ways: either you are taxed on the income of the trust and receive a charitable deduction for the income paid to the Pi Kappa Phi Foundation, or you are not taxed on the income paid to the Pi Kappa Phi Foundation and you establish an estate tax charitable deduction. A qualified advisor can help you determine which kind of lead trust is best for you.

## Bargain Sales

A bargain sale is part sale and part gift because the property is sold to the Pi Kappa Phi Foundation for an amount below fair market value.

## For More Information

All conversations with your advisors and you are held in confidence and without obligation. For more information on ways to contribute to the campaign, or to discuss a gift that is tailored to your needs, please call Tom Atwood at the Pi Kappa Phi Foundation office in Charlotte, NC at **704-504-0888** or toll free at **800-929-1904**.







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