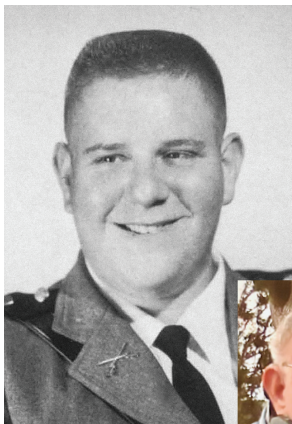


Creating a Legacy of Education



By generously including Marist School in his estate plans, the late Robert H. Shulman '62 created an enduring legacy that will impact generations of Marist students and their families.

An Atlanta native, Robert Shulman was a member of the final class to graduate on Marist's original campus



Robert H. Shulman '62

on Ivy Street in downtown Atlanta, when the school was known as Marist College. He was a Jewish student in a Catholic school, exemplifying Marist's longtime commitment to open its doors to students

of all faiths. To this day, Marist is intentional about enrolling students who practice faiths other than

Catholicism, placing value on interfaith dialogue and a culture of inclusion. Robert practiced his Jewish faith at The Temple, Atlanta's oldest synagogue, but found a welcoming community among his classmates at Marist.

Robert earned a Bachelor of Business Administration from Emory University and a Master of Business Administration from Georgia State University. He opened his own real estate practice, Fairfield Realty, where he served as CEO and CFO until his death 40 years later. Robert also acquired rental properties in Atlanta, which

allowed him to accumulate additional funds for his estate. In addition to his real estate business, Robert had an appreciation for antiques and collectibles. In 1979, he opened Gallery II in partnership with his brother, Thomas Shulman.

Well before his death in 2016, Robert began working with his lawyer, Stanley Baum, to draft his last will and testament. Over the years, Robert became close friends with Stanley and Stanley's wife, Louise. "Robert had a twinkle in his eye," shared Louise as she reminisced on their friendship with Robert. "Robert would give the shirt off his back to you. He was kind, and he cared more about others than himself."

During his lifetime, Robert generously planned to leave a legacy of education for others, and so he included Marist in his estate plans. In addition to his planned gift for Marist, he supported the Annual Fund and contributed to the school's most recent capital campaign.

Robert's bequest to Marist allowed for the establishment of The Shulman Family Trust, an endowed fund that provides tuition assistance for qualified Marist students. Since its creation, The Shulman Family Trust has provided financial aid for seven Marist students.

Robert's forethought to leave a legacy for the benefit of current and future Marist students embodies the Marist value of ardent love of neighbor. Marist School is grateful for Robert's generosity and for Stanley and Louise Baum, who worked closely with him and Marist to thoroughly carry forward Robert's vision.

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For more information on making a planned gift to support Marist School, please contact the Advancement Office at giving@marist.com or (770) 936-6424.



Let Your Appreciated Assets Reveal Their True Colors

Each August, the oak trees lining Ivy Street on Marist School’s campus welcome the Marist community home with their vivid green coloring. While green is the color of growth, fall colors are also beautiful and vibrant. Did you know the orange, yellow, and red pigments that color trees in the fall are inside the leaves all along? As the seasons change, the green pigments fade and make way for the vibrant fall colors.

What in your life has been green, but is ready for a season of change? Think of your assets as a leaf. They have been growing and gaining for years, perhaps even decades. Is it time for their growth to mature into vibrant returns for you?

If you have held your stocks or other securities for more than a year, and they are worth more than you paid, consider using them to make an impact at Marist School, while also receiving a tax benefit. Although your

stock may not be worth what it was at its peak, it is likely worth more than what you paid for it. Its green value is ripe for a change.

Right now, your stock’s value exists only on paper. You can make it real by transferring it to Marist School (without selling it) to receive an income tax deduction for its present value. You pay no capital gains tax on donated assets.

As the season changes, consider turning that stock you have been holding into real value for you and others today. There are many advantages to donating your appreciated assets such as stocks and other securities, personal property, and even real estate.

Have you already included Marist School in your estate plans? Please let us know so we can thank you and discuss the intentions of your gift!

Contact us today to learn more about gifts of appreciated assets!

giving@marist.com | (770) 936-6424 | maristlegacy.org

It’s Time to Look at Your IRA

For those who are at least 70-1/2 years old and are interested in making a tax-advantaged contribution to Marist School, fall is an ideal time to consider making a qualified charitable distribution from your IRA account. When you reach age 73, the government requires you to take a required minimum distribution (RMD) from your IRA, even if you do not want to take money from it.

However, there is a wonderful alternative. Rather than take the distribution yourself, contact your IRA administrator and ask to make the distribution to Marist School. This is called a qualified charitable distribution (QCD).

You can distribute up to \$100,000 (and so can your spouse if he or she has a separate IRA). The QCD satisfies your RMD up to \$100,000. While you will not get an income tax deduction, you will not have to pay income tax on it. To receive this benefit, your administrator must make the distribution directly to Marist. If you take it yourself, you lose these benefits. Contact us to learn how you can make an IRA distribution that will impact the lives of Marist students.

Now is the time to arrange your gift of appreciated assets or IRA qualified charitable distribution so that you can receive the tax benefits next year. Your gift will help advance the Marist mission of forming the whole person in the image of Christ.

This fall, why not use some of your “leaves” to create a colorful legacy?

Ask us about:



Gifts of Appreciated Assets



IRA Distributions



Charitable Trusts

Using your assets to help others does not mean you are giving them up. It means you are using them for a higher purpose, the reason you collected them. Each of the options above offer tax advantages for you. Contact us and let us help you maximize your income and tax-saving possibilities.



CREATE A COLORFUL LEGACY **AT MARIST SCHOOL**



Marist School's Heritage Circle

We are grateful for the members of the school community who have thoughtfully included Marist School in their estate plans.

We recognize this outstanding commitment through membership in the Heritage Circle, Marist's planned giving society. Contact us today to learn more.



As the leaves change and the holiday season approaches, many of us find ourselves reflecting on the present year and looking ahead to the next. Now is the perfect time to consider how you can make an impact for Marist School. By combining different giving tools, you can make your giving go further.

Blended giving is a combination of a current gift and a planned gift. It is an opportunity to support the mission of Marist School today and in perpetuity, so you can see your gift at work now while also ensuring the school's continued excellence in the future.

Like many of our longtime supporters, you may desire to make a significant gift, but are not ready to do so today. A blended gift allows you to make a planned gift through your will, trust, or beneficiary designation and then, by adding outright gifts of cash or property, you can see the current impact of your giving today. By adding a planned gift to your annual giving, you can benefit from tax savings.

As we prepare to celebrate the season of generosity, we invite you to make a gift that will help sustain Marist's tradition of excellence for future generations

Create a Legacy for the Future

By making a planned gift to Marist School's endowment, you can support the excellence and accessibility of the Marist educational experience for generations to come. There are many different planned giving vehicles to choose from:

- By adding an estate gift in your will, you can leave a legacy to make a difference even after you are gone.
- You can designate Marist School as the beneficiary of financial accounts such as insurance policies, investments, or retirement accounts. This is a simple, straightforward way to leave assets to an organization you care about without updating your will.
- Charitable trusts can offer immediate financial benefits, such as tax savings and income payments, and support the mission of Marist School. There are many options to choose from, such as a charitable lead trust or a charitable remainder trust.

Contact the Marist School Advancement Office to learn more about planned giving options. When you know all the opportunities available to you, you can do more than you might have thought possible.



MARIST SCHOOL ADVANCEMENT OFFICE

giving@marist.com

(770) 936-6424

maristlegacy.org

Marist School