

# From a chance encounter to a Lasting Impact



**Margie Edwards has seen the impact of a Marist education on the lives of her children and grandchildren. Her family's experience inspired her to make a gift that will impact future generations of Marist students.**

The Edwards family's relationship with Marist School began with a chance encounter. When the family experienced car trouble outside Perimeter Mall, a group of Marist students offered assistance. "No one told them to help—they just did it," Margie said. The act of kindness made a lasting impression. "We knew Marist is where we wanted our kids to go," Margie shared, "because we wanted our kids to be like that."

Years later, Margie and her late husband, Tom, enrolled their oldest son at Marist with their daughter and second son soon following. Margie became actively involved in the school community, serving two terms as co-president of the Marist Parents Club and forming lifelong friendships.

Marist School remains a special part of Margie's life, as well as the lives of her children (Scott Edwards '92, Amy Edwards Rohan '93, and Timothy "T.J." Edwards '99) and grandchildren. Three of Scott's four children have graduated from Marist (Tom Edwards '19, Anna Edwards '20, and Reed Edwards '24). Amy married her Marist classmate Todd Rohan '93, and their three children also have graduated from Marist (Michael Rohan '19, Ashley Rohan '21, and Madeline Rohan '23).

Margie credits Marist with forming her children and grandchildren into compassionate servant leaders with lifelong Marist connections. She also has remained friends with many of her fellow mothers of the Class of 1992, and they have

gathered monthly and volunteered together at Marist events for more than 30 years.

The same spirit of selfless service that first attracted Margie's family to Marist inspired her to include the school in her estate plans. In 2006, Margie became a charter member of the Heritage Circle by including Marist in her will, demonstrating her passion for the Marist mission of forming people in the image of Christ. "Marist forms good, well-rounded people with strong values. I've seen it in two generations of Marist graduates, and I hope it will continue," Margie said.

A Marist education touches both the mind and heart, so students can become the people God intends them to be. Heritage Circle members like Margie Edwards help to ensure that a Marist education is available for future generations.

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



**Margie and mothers from the Class of 1992 volunteered at the 2018 Marist Holiday Traditions.**

*I-r: Judy Russell, Marilyn Bailey, Carolyn McCrary, Margie Edwards, Sue Davis, Shelby Marston, Mary Ellen Harris, Anne Sumpter, Lynn Varian, Judy Faletti, Jane Christian; Not pictured: Charlotte Berens, Patty Malec, Jane McCauley, Sandie McLaughlin, Sally Stillwagon*



**Margie and her family gathered to celebrate the graduation of Reed Edwards '24.**

*Back row, I-r: Todd Rohan '93, Michael Rohan '19, Tom Edwards '19, Reed Edwards '24, Ben Edwards;*

*Middle row: Ashley Rohan '21, Amy Edwards Rohan '93, Carolyn Edwards, Anna Edwards '20, Scott Edwards '92, Timothy "T.J." Edwards '99;*

*Front row: Madeline Rohan '23, Margie Edwards, Morgan Edwards, Susan Edwards, Maisie Edwards*

# SHARE IN THE SPIRIT



Since its founding in 1901, Marist School has nurtured a strong tradition of school spirit that inspires our communal pursuit of excellence in all aspects of school life. This spirit is shaped by alumni, parents, parents of alumni, grandparents, and friends who are inspired by a generous commitment to support Marist School. In the fall, this uniquely Marist spirit can be felt in the air as our community gathers to cheer for the War Eagles, watch talented students perform on stage, and take part in a plethora of other school activities.

Fall is an ideal time to think about fulfilling your philanthropic goals for the year. By making a gift to Marist School before December 31, you can take advantage of tax benefits and make an immediate impact on the lives of Marist students. These gifts may take extra time to complete, so now is a great time to begin.

**Make a gift of appreciated securities:** If you sell stock or other securities that have increased in value, you will pay tax on the gains. Instead, if you donate the securities to Marist School, you will avoid paying capital gains tax, and the donation will be tax deductible.

**Open a donor advised fund:** A donor advised fund allows you to reap the tax benefits of donating a lump sum of money and then distribute it to Marist School and other charities when you are ready.

**Make a Qualified Charitable Distribution from your IRA:** If you are age 70½ or older, you can make a qualified charitable distribution of up to \$105,000 from your IRA to Marist School or other qualified nonprofit organizations. You will not pay any tax on the amount distributed. Beginning at age 73, you must take a required minimum distribution (RMD) from your IRA each year, even if you do not wish to withdraw the money. A qualified charitable distribution is a way to satisfy your RMD and make an impact on Marist students. Contact your IRA administrator to make a qualified charitable distribution.

Fall is also a good time to think about your legacy and how you want to be remembered. A solid estate plan demonstrates your values and provides for the people and causes that are most important to you. By including Marist School in your estate plans, you can help ensure that Marist's tradition of excellence remains strong for many years to come.

Contact us today to learn more about opportunities to support Marist School.  
giving@marist.com | (770) 936-6424 | maristlegacy.org

# Make an Impact through your IRA

Perhaps you have diligently saved for retirement for years, and now you must pay income taxes on money you withdraw from your retirement accounts. Depending on your age, your IRA offers tax-advantaged opportunities to support Marist School.

**At any age,** you can designate Marist School as the beneficiary of all or a percentage of your IRA or other retirement accounts. The money is yours to enjoy throughout your lifetime and then passes to Marist upon your death.

**If you are age 59½ or older,** you can take a distribution from your IRA without penalty and then make a gift. Your gift will be tax deductible.

**If you are 70½ or older,** you can give any amount up to \$105,000 each year from your IRA directly to Marist School without paying income taxes on the gift. Your gift can satisfy all or part of your required minimum distribution (*which begins at age 73*) and reduce your tax liability.

## A NEW OPPORTUNITY

The SECURE Act 2.0, which took effect in 2023, offers a new way to leverage your IRA for philanthropic purposes and provide income for yourself or your loved ones. This new legislation allows individuals over 70½ years old to make a one-time election to direct a qualified charitable distribution of up to \$53,000 from their IRA directly into a new charitable remainder trust.

When you create a charitable remainder trust, you or a loved one receive income

payments for life or for a set term of up to 20 years. At the end of the trust term, the remaining balance of the trust is transferred to the charitable beneficiary you have designated.

**Contact Marist School's Advancement Office to learn more about making an impact through an IRA and other opportunities to help advance the Marist mission of forming the whole person in the image of Christ.**

## MAKE *your* MARK. ANNUAL FUND CHALLENGE

Marist's Annual Fund fulfills the school's most pressing needs and supports the academic, extracurricular, and spiritual programming that define a Marist education. We are grateful to all who donated during the 2024 Make Your Mark Annual Fund Challenge. If you did not have a chance to give during the challenge, we invite you to make your mark with a gift to the Annual Fund.

Visit [marist.com/annualfundgiving](https://marist.com/annualfundgiving) to learn more.



### 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.**



# SHOW YOUR SPIRIT Create your Legacy

By including Marist School in your estate plans, you can create an enduring legacy and touch the lives of countless Marist students and families. But perhaps you have hesitated because you wish to leave assets to your loved ones. The good news is that you do not have to choose between the two.

## PERCENTAGE GIVING

Instead of giving a fixed amount, consider giving a percentage of your estate or specific assets. That way, gifts to loved ones and to institutions such as Marist School are proportional.

Here are three simple ways to put family first while also supporting the Marist mission:

- Gift a percentage of your estate to Marist School in your will.
- Leave Marist School a percentage of your residual estate (the portion of your estate that remains after all distributions have been made and all claims of the estate are satisfied).
- Name Marist School as a beneficiary of a percentage of your retirement account or life insurance policy.

## YOUR GIFT MATTERS

From one generation to the next, the spirit of Marist School remains strong thanks to the collective support of our school community. Giving a small percentage of your estate can have a bigger impact than you may think.

We invite you to contact Marist's Advancement Office and visit [maristlegacy.org](https://maristlegacy.org) to learn more about opportunities to support the Marist mission, including sample verbiage for a percentage bequest. If you have already included Marist in your estate plans, please let us know so that we may thank you for your generosity.

Marist School

MARIST SCHOOL ADVANCEMENT OFFICE

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