



Heritage Circle

The Season of Giving

Dear Friends,

As we enter the season of giving, a time of reflection and gratitude, we are reminded of the many blessings that make the Marist School community so special. Each day, we see the impact of generosity in the lives of our students, and we are deeply grateful for all who help carry forward the Marist mission that forms hearts and minds to lead and serve.

We extend our heartfelt thanks to members of the Heritage Circle, whose thoughtful foresight and generosity help sustain our work and allow Marist's mission to thrive. By including Marist School in their estate plans, these individuals have made a lasting commitment to our students' spiritual and intellectual growth. Their gifts strengthen our endowment and provide stable annual funding for tuition assistance, faculty professional development, and mission-aligned initiatives that nurture compassionate leadership.

Heritage Circle members like Kevin David Kell '73 and Jane Ray Kell are visionaries. Kevin, a proud Marist alumnus, was deeply moved by the Marist priests who nurtured his spiritual and academic growth as a student who was not Catholic. In gratitude for their guidance, he has chosen to support Marist's educational mission through an estate gift. Together, Kevin and Jane fully believe in the transformative power of a Marist education and are committed to ensuring that the spiritual and educational inheritance from the Society of Mary continues to inspire future generations.

For those who are considering joining the Heritage Circle, I invite you to take this meaningful step. **Including Marist School in your estate plans ensures that our mission and tradition of excellence will continue to grow and serve current and future students.** This issue also highlights ways to make a difference through simple year-end gifts that provide an immediate impact on Marist students. Whether through planned giving or year-end support, your generosity helps strengthen and sustain the Marist community today and into the future.

This season, we are especially grateful for you, our partners and friends, whose belief in Marist's mission brings hope to our community and joy to our hearts.

With deep gratitude and warm wishes,

Angela H. Dorsey

Angela Dorsey
Vice President for Institutional Advancement

P.S. We would be happy to connect with you to discuss how you can leave a legacy at Marist School. Please contact us at giving@marist.com or (770) 936-6424.



Heritage Circle members
Kevin David Kell '73 & Jane Ray Kell

“I was inspired to remember Marist in my estate plan because Marist was there for me when I needed it most. Marist provided the stability and structure that allowed me to find myself, make friends, and flourish. Also, as a non-Roman Catholic, it provided me with ecumenical spiritual support and meaningful guidance—not to mention a great education.”

—Kevin Kell '73





YEAR END GIFTS:

Simple, meaningful
ways to support
Marist students today



As the holidays approach, many of us pause to reflect on the blessings and challenges of the past year. For some, this season is a time of gratitude, faith, and family, while for others it is a moment to consider the future. Year-end giving not only provides direct support to Marist students today but also offers an opportunity to align your financial planning with your values.

Gifts of Appreciated Securities

Donating appreciated securities is one of the most impactful ways to support Marist. If you own stock or mutual funds that have increased in value and you have held them for more than a year, you can gift them directly to Marist. This allows you to potentially receive an income tax deduction based on the fair market value of the securities while avoiding capital gains tax on the appreciation. As a result, you can make a greater contribution at a lower net cost to you. For many, this is a simple way to meet both financial goals and the desire to support Marist students.

Gift of Appreciated Securities

Avoid capital gains tax

Tax deductible for fair
market value

Maximize impact and
tax savings

Cash Gift

Simplest way to give

Tax deductible for full amount

Immediate benefit to
Marist School

Contact us today
to learn more about gifts of appreciated securities.

giving@marist.com

| (770) 936-6424

| maristlegacy.org

IRA CHARITABLE ROLLOVER

If you are age 70½ or older, you can make a meaningful impact by giving through an IRA charitable rollover, also known as a qualified charitable distribution (QCD). This giving option is very popular because it is straightforward and offers several benefits.

In 2025, you can transfer up to \$108,000 directly from your IRA to Marist School. These transfers can count toward your required minimum distribution (which begins at age 73) and may reduce your taxable income. For those who do not need their full IRA distribution for daily expenses, it is a meaningful way to redirect those funds to support Marist students and programs.

IRA charitable rollovers are a simple way to donate, help reduce taxable income, and make an immediate difference. And even more, it supports the formation, academics, and faith life that are central to Marist School.



HOW AN IRA CHARITABLE ROLLOVER HELPS YOU:

Reduces Taxable Income • Satisfies Required Minimum Distribution • No Need to Itemize Deductions



THE FINE PRINT



Age
70½
or older

Up to
\$108,000
in 2025

Reduce
TAXABLE
income

To take advantage of these benefits, the gift must be distributed directly from your IRA to Marist.

At any age, you can plan for tomorrow by naming Marist School as the beneficiary of all or a percentage of your IRA or other retirement accounts. This allows you to enjoy your savings throughout your lifetime, while ensuring your legacy continues to support Marist students. We are delighted to honor this meaningful commitment with membership in the Heritage Circle.

Embrace the Joy of Giving

As the year draws to a close, it is a great time to consider what you value most and how you want to carry those values forward. Much like the welcome a new year brings, with hope, renewal, and opportunity, planning your estate or updating beneficiary designations can be a meaningful celebration. These thoughtful decisions offer a tangible way to give thanks for all you have received and to pay it forward to future generations of Marist students.

There are many joyful and simple ways to plan a gift. It can be as easy as including Marist in your will or adding Marist as a beneficiary on a retirement account or life insurance policy. No matter the size, each gift becomes a meaningful part of your legacy, creating a lasting impact for years to come.

During this season of gratitude, we invite you to embrace the joy of giving and consider how your plans can reflect the faith, values, and generosity that have shaped your life.



The Heritage Circle

The Heritage Circle recognizes members of the community who have chosen to include Marist School in their estate plans to strengthen the school's endowment and provide support for future generations of students.

Members receive invitations to special events, recognition in Marist publications and on the Heritage Circle Honor Wall, and a lifetime pass to regular-season Marist athletics.



Year-End Planning Checklist

- ✓ Review or update your will
- ✓ Check IRA and insurance beneficiaries
- ✓ Consider an IRA charitable rollover
- ✓ Consider donating appreciated securities to Marist
- ✓ Let us know if you have already included Marist in your philanthropic plans

MARIST SCHOOL ADVANCEMENT OFFICE

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

Marist School