



Heritage Circle

PERSONAL PLANNING NEWSLETTER

Preserving Marist's Tradition of Excellence for Future Generations

"The Marist School community is our family," shared Heather and Jimmy Nichols as they reflected on the impact the school has had on their lives. Having strong ties to Marist, Heather and Jimmy generously decided to make a planned gift to preserve the school's unique traditions for future generations.

Heather Nichols' relationship with Marist began when her brother, Ricky Chandler '78, enrolled. Heather graduated from Northside High School in 1970, as Marist was not admitting female students at that time. She later joined the Marist community in fall 1988 as a mathematics teacher, and she served Marist as head varsity football cheerleading coach for 17 years. In 2012, Heather was honored with the Frank P. Hagan Memorial Coach's Award for inspiring growth and personal excellence among student-athletics through competition, sportsmanship, and teamwork.

The War Eagle spirit was passed on to Heather and Jimmy's three children—Jim Nichols '95, Paul Nichols '99, and Allyson Nichols Miller '02. As Marist students, Paul '99 and Jim '95 played football while Allyson '02 followed in Heather's footsteps as a member of the cheerleading squad. The strong Marist connections also extend to the spouses of their children. Jim '95 married fellow alumna Kristin Marzano Nichols '02, and Allyson Nichols Miller '02 married her high school sweetheart Bartley Miller '02. Additionally, Paul '99 married Lauran Lightmas Nichols, who served as Marist's director of alumni engagement for two years. This fall, the Nichols will become Marist grandparents when Allyson and Bartley's son John joins Marist's Class of 2029.

When Heather and Jimmy began making their estate plans while Heather was still on the faculty, they acknowledged that Marist was an important investment as the school meant

something to every member of their family. They had witnessed firsthand the extraordinary power of a Marist education and the long-lasting interconnectedness of the Marist community. "It was an easy decision for us to make, and every little bit helps," said Heather, as she expressed the importance of sustaining Marist's strong tradition of excellence.



Heather and Jimmy Nichols' planned gift reflects the positive impact Marist School has had on their entire family.

In addition to their generous planned gift, the Nichols family supports Marist each year by volunteering, participating in campus events, and contributing philanthropically. They donate to the Annual Fund each year and previously served as Annual Fund volunteers as well. They also understand the importance of contributing to Marist's endowment, which helps guarantee the future success of the school. In celebration of Heather's retirement, the Nichols family created a legacy at Marist by establishing The Heather C. Nichols Scholarship Fund. They also make donations to Marist's endowment in memory of loved ones who share a connection to the school.

We are grateful for the many ways the Nichols family serves Marist and for their thoughtful decision to include Marist in their estate plans. Heather and Jimmy's generosity is recognized by Marist through membership in the Heritage Circle.

IN THIS ISSUE

- **Take a Turn in the Right Direction**
- **Your Life & Your Goals**
- **Make Your Giving Go Further**

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**.



TAKE A TURN IN *THE RIGHT DIRECTION*

We know many Marist School families will enjoy road trips this summer. With technology advancing at rapid speed, do you ever wonder if self-driving cars will become the norm someday, transporting us to and from our destinations? According to experts, many of us will soon “drive” self-driving cars to where we want to go, allowing us to sit back and sleep, play chess, read, or just enjoy the travel time with family and friends.

While that may be the future, most people may not be ready to turn over control and trust self-driving cars. Will a self-driving car stay on the road and get me to the right place? How will it handle something unexpected?

When it comes to the safety and care of loved ones, many of us would not feel comfortable relinquishing control to a car that was on autopilot. What if it did not work as intended? Yet, when it comes to our finances, healthcare, and our estate plans, many of us have unknowingly chosen to give up control to a system that will make decisions for us and our loved ones. Under state law, if you are incapacitated or die without a plan, someone else will make important decisions that could affect you and your loved ones.

For example, if you pass away without a will or trust, a court will determine how your assets are distributed, which might happen in a way that does not reflect your wishes.

Do not leave your legacy to chance. It is easier than you might think to write a will and provide for the people and causes that mean the most to you. We can help you gather the information necessary to create your plan.

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.



Request a free estate planning guide today!

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

Your Life & Your Goals

While the world may not be quite ready for a self-driving car, it is nice to imagine a car that could give you peace of mind by avoiding traffic jams, getting you to your destination sooner, and saving you money by reducing fuel consumption.

Likewise, we can help identify opportunities for support that will put your mind at ease while possibly providing you and your family with financial benefits.

Most of your wealth is probably invested in your home, a bank, or other investment accounts. These assets can all be transferred to your loved ones or benefit Marist School without you ever writing a will. By making a simple change, these assets can go automatically to the beneficiaries you select.



- **LIFE INSURANCE** — Complete a beneficiary designation form, designating a person or charitable beneficiary, like Marist School, for your life insurance policy.
- **IRA** — Complete a beneficiary designation form to benefit your loved ones and Marist School. Many administrators now make these forms available online.
- **INVESTMENT, CHECKING AND RETIREMENT ACCOUNTS** — List your loved ones or favorite charitable organization, like Marist School, as payable on death beneficiaries on a form provided by your account administrator.
- **REAL ESTATE** — Give your property to loved ones and your favorite charitable organization, like Marist School, by deed while reserving a life estate. Contact us for a free illustration of the benefits of this plan.

When a beneficiary designation is completed properly, assets simply pass automatically at your death. Contact Marist School's Advancement Office for all the ways you can make modest changes to your plans and help advance the Marist mission of forming the whole person in the image of Christ.



MAKE YOUR GIVING GO FURTHER

Technology has made our lives easier. Just by using a smartphone, you can talk to people all over the world, check the weather forecast, or reserve a seat on a plane. The true power of the smartphone is how it combines myriad tools in a single sleek device.



As you thoughtfully consider your support of Marist School, you might be interested in ways to increase your impact. By combining different giving tools together, you can multiply the difference you make.

We are very appreciative of those who support Marist each year by donating to the Annual Fund. In addition to supporting the Annual Fund with an outright donation each year, here are some ways your annual gifts may be combined with other opportunities to increase the impact of your support of Marist School:

- You can **add an estate gift in your will to create an endowed fund** and ensure that your legacy of support for Marist's mission continues.
- **In addition to your annual gifts, you can make a single gift to fund a charitable lead trust** that will make payments to Marist School for a designated number of years and then pass the trust property to your family with no additional tax. Marist School and your family will benefit tremendously.
- Alternatively, **you can transfer cash or assets to fund a charitable remainder unitrust** that will make payments to you or any other designated trust beneficiaries for a number of years. Marist benefits from what remains in the trust after all the trust payments have been made. You will receive an income tax deduction in the year that you transfer the assets to the trust.

When you know about all the tools available to you, you can do more than you might have thought possible. By adding an estate gift to your annual giving, you can benefit from tax savings. Contact us today to learn how we can help you combine your giving in a way that benefits you and helps advance the mission of Marist School.

MARIST SCHOOL ADVANCEMENT OFFICE

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