

Provide a Legacy of Publishing Excellence



The University of North Carolina Press
Is Especially Grateful
for Planned Gifts
from Friends and Their Families

We Invite You to Join
This Distinguished Group,
and to
Be a Part of Publishing Excellence

UNC THE UNIVERSITY of
PRESS NORTH CAROLINA PRESS

MAKING A DIFFERENCE

UNC Press is fortunate to have the support of friends like you who share a love of books and reading, and who have an intellectual curiosity about the world around you. When you create a planned gift for the benefit of the University of North Carolina Press, your legacy sustains one of the finest publishing programs in the nation, with a long history of distinguished scholarship and beloved regional books.

Defining your legacy is one of the most important decisions you will make in your lifetime. Working with UNC Press staff and your own professional advisers, you can incorporate specific language in your will or trust, ensuring that your gift reflects your passion and defines your legacy. We welcome the opportunity to work with you and your advisers to tailor this language appropriately so that we may honor your charitable intentions.

When you create or revise your estate plan, we hope you will include the University of North Carolina Press among your beneficiaries.

CONTRIBUTOR'S COMMENTS



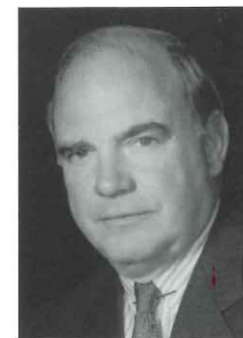
H. Eugene Lehman

“University professors have a responsibility for creating knowledge as well as sharing knowledge. I feel that the Press is an arm of the University that makes permanent the contributions that a professor makes in his lifetime.”

— H. Eugene Lehman

“I created the endowed Luther H. Hodges Sr. and Luther H. Hodges Jr. Series on Business, Society, and the State because I wanted to honor a dedication I share with my father to helping business and government work more effectively together. I know of no institution better equipped to publish serious works of lasting value than UNC Press. Press books improve the lives of North Carolinians.”

— Luther H. Hodges, Jr.



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Luther H. Hodges, Jr.

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CHOOSE THE PLANNED GIFT THAT WORKS FOR YOU

There are numerous ways you can make a planned gift to support the Press:

- **Bequests** are uncomplicated arrangements in which you name the Press as a beneficiary in your will. A bequest is simple to arrange, allows you to retain your assets throughout your lifetime, and permits you to designate a specific dollar amount, a percentage of your estate, or a particular asset. A bequest to the Press may also reduce the taxes on your estate.
- **Retirement plans**, such as IRAs and 401(k)s, are an ideal asset to give to the Press because they are easy to allocate and can be a wise tax strategy. Simply designate the Press as a beneficiary of your retirement plan.
- **Trusts**, such as charitable remainder trusts and charitable lead trusts, can take several forms with several benefits. The Press does not need to be named as trustee for you to designate the Press as a beneficiary.
- **Insurance policies** are also a straight forward gift you can give. Simply designate UNC Press as a beneficiary of your policy, or if you no longer need the policy, gift the policy to the Press.

FREQUENTLY ASKED QUESTIONS

Q: Is it difficult to make a planned gift?

A: Not at all. For beneficiary designations (retirement or life insurance), contact your plan administrator for a change of beneficiary form, on which you list “The University of North Carolina Press, Inc.” as the primary beneficiary for all or a portion of the account. If you already have a will, you can add the Press as a beneficiary with a phone call to your attorney to prepare a codicil.

Q: Is there a typical planned gift?

A: No. Your planned gift will be what is right for you. UNC Press has received gifts ranging from \$500 to \$500,000.

Q: What assets can I leave to the Press?

- A:** You may designate:
- A specific cash amount
 - A percentage of your estate or assets
 - The residual of your estate after your heirs are provided for
 - Financial investments, such as stocks, bonds, or certificates of deposit
 - UNC Press as the beneficiary of your life insurance policy or your retirement plan
 - Items such as art, antiques, jewelry, real estate, or copyrights

Q: Should I let the Press know about my planned gift?

A: By informing us about your plans, you give UNC Press the opportunity to recognize you during your lifetime, you give yourself peace of mind knowing your intentions have been communicated clearly, and you give others the inspiration to follow your lead. Informing us does not make your gift binding. You may change your estate plan if your circumstances or priorities change.

Q: What is the legal name and tax I.D. number of the Press?

A: The University of North Carolina Press, Inc. and 56-6001394.

Q: How can I learn more about making a planned gift for the Press?

A: For more information please contact:

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*UNC Press is a nonprofit 501(c)3 organization.
All contributions are tax-deductible as provided by law.*

THE FIRST EDITION SOCIETY

To express our gratitude to you during your lifetime, the Press has established the **First Edition Society**, honoring those who have declared their support of the Press through a planned gift. If you share your intentions with us, you will become a member of the Society and will receive an autographed UNC Press book, invitations to special events, and recognition in an honor roll of contributors (unless anonymity is requested).