



# The Foundation CHRONICLE

*A publication of the Delta Chi Educational Foundation*

## Alums and students to meet at Jackson Leadership College

### Helpful brochures for financial planning:

- Giving Securities
- Giving Through Your Will
- Giving Through Charitable Remainder Trusts
- Giving Through Retirement Plans
- Giving Through Gift Annuities

Brochures mailed free upon request. To order, call the Delta Chi Educational Foundation toll-free at 866-214-8114 with requested titles, or email us at [fdnstaff@dcef.com](mailto:fdnstaff@dcef.com).

The next session of the Jackson Leadership College is scheduled for July 22-24, 2005 in the University of Iowa's Memorial Union in Iowa City.

Named after the former Washington Senator, Henry "Scoop" Jackson, Washington '34, the Jackson Leadership College is a gathering of Delta Chi undergraduates and alumni for the purpose of developing their interpersonal, leadership and management skills.

The setting is relaxed with opportunities for both small group interactions and large group discussions.

The three-day program will include a variety of educational programming, brotherhood activities and tours of the Fraternity's International Headquarters.

The registration fee includes two nights hotel lodging. The Foundation awards \$100 scholarships to the first 100 undergraduate applicants.

Request an application by calling the Delta Chi Educational Foundation toll-free at (866) 214-8114, or download directly from our website [www.deltachifoundation.com](http://www.deltachifoundation.com). Click on Programs Jackson Leadership College.



*Jackson Leadership College founder, former Senator from Washington state, the late Henry "Scoop" Jackson, Washington '34.*

## Avoid cap gains taxes by donating securities

Americans have long enjoyed both the philanthropic and tax benefits of making charitable gifts, but donating securities can be especially advantageous over giving cash outright.

This chart highlights a helpful example. Say you commit to give \$10,000 to charity, normally in the form of cash. Note that in the 35% tax bracket, you'd realize tax savings of \$3,500 by making gifts of cash.

The least desirable option would be to sell the stock and donate the proceeds because the payment of capital gains tax would reduce your net tax savings.

The best choice, however, is making your gift in the form of appreciated stock. With a cost basis of \$2,000, you would avoid capital gains tax on the \$8,000 increase, and the combined tax savings grows to \$4,700, a whopping 34% greater savings than giving cash.

This is possible because our tax laws provide that one can give appreciated assets and take an income tax deduction based on the current fair market value of the donated security, no matter how much was originally paid!

Assuming 35% Income Tax Bracket	Plan A Give \$10,000 Cash	Plan B Sell Securities & Give Cash	Plan C Give Securities Outright
Gift value	\$10,000	\$10,000	\$10,000
Ordinary income tax savings	\$3,500	\$3,500	\$3,500
Cap gains tax saved/paid at 15% tax rate	N/A	\$1,200 paid	\$1,200 saved
Net tax savings	\$3,500	\$2,300	\$4,700

*Note: This article provides general gift, estate, and financial planning information. For advice specific to your situation, please consult your tax professional.*



## Foundation hires new Assistant Secretary

Mona Safley has joined Delta Chi Educational Foundation as Assistant Secretary/Treasurer, effective February 1, 2005.

In this position, Safley will be responsible for overseeing day-to-day operations at the Columbus headquarters, as well as fundraising and maintaining relationships with over 80,000 Delta Chi alumni worldwide.

She reports directly to Foundation Secretary/Treasurer

Safley comes to the Foundation with an unusually diverse background in nonprofit management, finance and marketing. She is a former licensed stockbroker and securities trader for J.J.B. Hilliard Lyons, Inc. in Louisville, and also a former national public speaker for the data processing industry.

Safley has a plethora of earned academic degrees including a Bachelor of Science in management from University of Cincinnati in 1980, and a Master in Business Administra-

tion from Bellarmine University in 1983.

Although not a sorority sister, Mona did *study* Greek for one year while earning a Master of Divinity from Louisville Presbyterian Seminary in 1998.

Of her new position, Safley said, "I'm excited about coming to work for the Foundation. Academic pursuits and securing funds for the same has long been a priority of mine. I hope that my skills will only be an asset to the organization."

Mona can be reached at [mona.safley@dcef.com](mailto:mona.safley@dcef.com).

*"Academic pursuits and securing funds for the same has long been a priority of mine," says new Foundation hire Mona Safley, MBA.*

## Donate now and capture a DCEF coaster

For this particular appeal only, the Delta Chi Educational Foundation is offering sandstone coasters to first-time donors. One coaster will be mailed for every \$100 contributed *while supplies last*.

The round coasters are ivory sandstone with a non-skid bottom, and feature the Foundation's "lamp of learning" logo.

Sandstone is an absorbent material, meaning these coasters feature a helpful "no sweat" design.

These beautiful coasters are in stock and available for immediate shipment. Similar coaster sets retail for \$14.95 or more at better stores.

Note: To receive your coaster(s), be sure to write COASTERS on your returned donor slip.



*Earn your logo coaster—send in your gift of \$100 or more today!*



Lost a brother in the maze of life? Our website can help!

## "Lost and Found" department for brothers

Have you lost contact with a Delta Chi brother? Want to renew college friendships and catch up with an old friend?

The Delta Chi Educational Foundation's "Find a Brother" program can help you do just that.

To use this free service, log on to our website, click on Alumni Info Find a Brother, then complete the form giving us information on the brother you are seeking.

We will then research our alumni database, doing our best

to locate your friend. If found, we will contact him for permission to pass along his personal information to you.

Search away—perhaps many happy reunions with Delta Chi chums await you!