



THE 1848 SOCIETY

Since its founding in 1848, the University of Mississippi has benefited from the foresight and generosity of people who have invested in the future by naming the University as a beneficiary in their wills. As tax laws changed, many other gift plans emerged, and each year these planned gifts have added to the value of the University's endowment and provided funds for professorships, research, facilities, library books, scholarships, lectureships, and many other specific programs to enhance academic and athletic excellence. Those who have made commitments to Ole Miss through planned gifts have left significant legacies and have truly become partners in the growth and development of the University of Mississippi.

WHAT IS THE 1848 SOCIETY?

The 1848 Society was established in 1998, the University's 150th year. The society recognizes alumni and friends of the University who have funded or planned a deferred gift, such as a bequest or a life income plan.

QUALIFICATIONS FOR MEMBERSHIP

Anyone who has an estate gift planned for Ole Miss or who has completed a life income trust, retained life estate gift, or other charitable trust plan for Ole Miss is eligible for membership in the 1848 Society. For example, the University of Mississippi Foundation can be made the beneficiary of donors' estates through specific bequests written into a donor's will or by being named the beneficiary of a life insurance policy or retirement plan. Donors who establish life income plans, retained life estates, or other charitable trusts that benefit the University, whether Ole Miss manages the plan or not, also qualify.

Gift plans conferring membership eligibility include the following:

- Simple bequests
- Life income gifts, including immediate or deferred-payment charitable gift annuities, charitable remainder annuity trusts, or unitrusts
- Retained life estate gifts
- Charitable lead trusts that pay income to Ole Miss through the University of Mississippi Foundation
- Designation of the University of Mississippi Foundation as beneficiary of a life insurance policy or retirement plan

Most plans that make donors eligible for membership can be funded with either a lifetime gift or a testamentary gift made through the donor's will. If you have questions about a gift plan you believe might qualify, please contact the University of Mississippi Foundation at (662) 915-5208.

WHAT BENEFITS DO MEMBERS RECEIVE?

1848 Society members who give their consent are listed in the University of Mississippi Foundation Annual Report and, from time to time, in other University publications. A certificate, signed by the chancellor, confirms membership. 1848 Society members are invited to University donor-recognition events. Most importantly, 1848 Society members enjoy the appreciation of a grateful University.

HOW DO I JOIN?

Anyone interested in joining the 1848 Society may become a member by completing a deferred gift plan for Ole Miss and confirming the plan on the enrollment form, or in a separate letter. Donors should also provide a fully executed copy of the section of their will that pertains to the gift.

Those who qualify by virtue of having completed a life income or other trust gift will automatically be invited to join if the gift plan is administered by the University of Mississippi Foundation. Those whose gift plans are managed by outside trustees or fiduciaries should simply confirm the plans existence by completing the enclosed enrollment form or by sending a separate letter. When registering, new members should indicate whether their names should be kept in confidence or whether they may be listed as 1848 Society members in the University's publications.