Estate Planning Made Easy

In a nutshell, estate planning is really what you want done with what you own. The good news is, you can provide for the people and causes that are important to you by taking simple steps now. Creating your plan for the future can be easy and even enjoyable.

While an attorney should always draft your will, we can help demystify the process and prepare you for meeting your attorney with these simple steps.

1. **Itemize Your Assets**—Take a piece of paper and draw a line down the middle. On the left side, list something you own. On the right side, write the name(s) of the person(s) you wish to receive that item or asset.

2. **Write Down Questions**—Consider practical questions, such as, “If I give my house to my adult son and my adult daughter, what will they do with it?” If you come up with a question that you can’t seem to find a solution for, make a note to ask your attorney.

3. **Review Your Plans for Family**—You can give some assets to family right away and others over time. Ask us how you can provide an income stream or a lump sum to a loved one and achieve your personal and inheritance goals.

4. **Consider YHC**—If the College is important to you, please consider including us in your estate plans. Your thoughtful planning can significantly impact current and future students.

5. **Visit Your Attorney**—Bring the information you have gathered and any questions you may have to your attorney. Your attorney can draft a will or trust that will achieve your goals. You then complete the plan through a simple signing process.

6. **Update Your Plan**—Update your estate plan as your life changes. Marriages, births and deaths are all events that may make you want to revise your plans.

For Serrill Farmer Boone, ’66, Young Harris College is more than just her alma mater—it’s one of her great loves. That’s why she decided to create a lasting legacy to benefit a place she’s always held close to her heart for many reasons.

The Austell native can still remember her first visit to campus as a high school senior. “I knew right away that I wanted to go there,” she said. “In fact, it’s the only school I applied to.”

Boone was highly involved in campus organizations like the Sigma Beta Sigma sorority, choir and student senate. She enjoyed attending basketball games and dances, and relished her time as a resident assistant in Appleby East.

“We left our doors open all day long,” she recalled. “I loved decorating our halls for Christmas. Every season was wonderful, but the autumn leaves and the winter snow were the best.”

In addition to lifelong friends, Boone also developed strong bonds with her professors. Through her planned gift that provides scholarships for deserving students, she hopes her experiences will be echoed by future generations.

“I valued the small class sizes and the personal input I received,” she said. “It’s important to give back to ensure that as many students as possible get the chance to learn in such a wonderful environment.”

Boone continued her education at Jacksonville State University and resides in Jacksonville Beach, Fla., with her husband of 46 years, Dr. John Boone. As an active member of her church, she teaches Sunday school and attended a mission trip to Chad, Africa.

The dedicated alumna is helping her Class Coordinators prepare for their upcoming 50th reunion. “I’ve enjoyed getting in touch with my classmates and spreading the word about this great opportunity to reconnect,” she said. In addition to investing her time in YHC, Boone is making an impact through her financial support. “I made my planned gift to the College because I love YHC so much,” she said. “I want to make sure future students have the opportunity to experience it as well.”
THE LEGACY YOU LEAVE

One of the most effective but simplest ways you can support Young Harris College is by including a gift in your will. Also known as a charitable bequest, a gift made through your will can benefit both you and the College.

Why might you want to make a charitable bequest? Here are some of the benefits of bequest giving:

• A bequest is flexible. You can make a gift today by including a provision in your will and change your mind anytime in the future.
• With a bequest, you can give as much or as little as you want to the College through your will without impacting your lifestyle today.
• You may continue to benefit from and make use of your assets (your home, stocks, IRA, etc.) during your lifetime, since the gift is made when you pass away.
• It typically costs nothing to add a charitable bequest to your first will or at a later date when you decide to update your plan.
• If you have a taxable estate (over $5.34 million this year), your estate may benefit from estate tax savings. This means you can preserve and give more of your estate to your family.

You can create a legacy by which to be remembered through bequest giving. Please let us know if you have already included YHC in your plans so we can recognize and thank you.

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If you are interested in learning more about creating or updating your estate plan, please visit yhc.edu/bequests. You will find bequest language and other tools designed specifically to help you and your attorney. Please call or email us if we can be of assistance to you in your planning.

A WAY TO SAY THANK YOU

The W. Harry and Harriett Hill Society for Planned Gifts

Young Harris College receives bequests every year from individuals who never told us the College was in their wills. We deeply appreciate these gifts, and they have been invaluable in helping us to educate, inspire, and empower our students. However, we always regret that we were unable to thank these wonderful donors for their generosity and foresight or to help them visualize what their gifts would accomplish.

The W. Harry and Harriett Hill Society for Planned Gifts allows us to thank and recognize individuals who have provided for some form of a future gift. You may become a member of the Hill Society in many ways: making a bequest in a will or living trust, designating the College as a beneficiary in a retirement plan or life insurance policy, establishing a charitable remainder trust, or making any other planned gift that provides for the College’s future.

If you have already arranged a future gift, we invite you to indicate this on the attached response card. You are among our most important donors, and we would like the opportunity to thank you now for what’s coming later. We can also document your gift and learn more about your wishes and how you would like them to be enacted.

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(706) 379-5318
jmcafee@yhc.edu

Young Harris College
Office of Advancement
PO Box 275, 1 College St.
Young Harris, GA 30582

(800) 241-3754  |  yhc.edu/plannedgiving

A Gift From the Heart

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