

HERITAGE LEGACY SOCIETY

“Without a Heritage, Every Generation Starts Over.”

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New Heritage Legacy
Society Members





Time for a New Fight Song

By Kevin Roberts

THE TYPICAL university alumni newsletter arriving in thousands of mailboxes this fall will be engineered for maximum nostalgia. It will be chock full of niceties: a successful football season, the whereabouts of former classmates, ways its next graduating class will be the best yet. But what is not discussed is just as—perhaps even more—important as what is.

What you won't see is the product of the Left's long march through our institutions: intellectual and cultural decay. You've seen the headlines; the professor who expressed a conservative viewpoint and lost her job, right-of-center speakers canceled, biological men celebrated as "Woman Athlete of the Year."

Conservatives need to start reading the fine print when it comes to their alma maters. Their Good Ole U is now a highly

sophisticated indoctrination machine with an army of enforcement officers ready to carry out all manner of wokeism—and they're spending millions of our philanthropic dollars while doing it. The morally outrageous demands our moral outrage, and it's time to replace nostalgia with righteous indignation. It's time to go on offense.

Redirecting legacy giving toward truly conservative institutions is one way you can help defeat the Left's hold on our universities. By making Heritage a beneficiary of your IRA, insurance, or other designation account, you can play a critical role in stopping the radical assault on America. Read on to learn more, and let's fight to take this country back.

Sincerely yours,

A handwritten signature in blue ink that reads "Kevin Roberts". The signature is fluid and cursive, with a large, stylized "K" and "R".



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Defund Indoctrination U

WE'VE ALL SEEN THE outrageous stories coming out of academia. The brazen cancelation of conservative speakers and viewpoints. The adoption of radical gender policies causing faculty to be reprimanded for the misuse of pronouns. The complete upheaval of women's sports under the guise of "gender inclusion and diversity." A proliferation of curriculum promoting socialist ideologies and divisive critical race theory.

It's no wonder we're hearing from concerned Heritage members wanting to know, "Is there anything they can actually do about it?"

First, thank you for helping Heritage sound the alarm about this critical issue. Last year, we launched groundbreaking research about the millions of dollars being spent on Diversity, Equity, and Inclusion (DEI) staffing on college campuses across the country. DEI's influence has taken over university policies and programs,

carrying out the Left's agenda in the process.

Virtually no campus is exempt from this alarming trend, but some have taken it to an almost inconceivable level. At the University of Michigan, 163 employees were formally allocated to DEI programming and services—an annual cost certain to be in the tens of millions. The University of North Carolina at Chapel Hill had 13.3 times as many employees devoted to promoting DEI as providing services to people with disabilities. The University of Virginia had 6.5 DEI staff for every 100 professors.

These disturbing statistics—and so many more—should have every conservative thinking about how to defund the institutions of indoctrination that universities have become. Unfortunately, there are just as many examples of conservative-minded alumni making significant gifts to even the most egregious of offenders. How can this be possible?

The reasons vary: deep-seated nostalgia expertly kindled by university communications, loyalty built on personal experience or family legacy, the genuine desire to do something positive for future generations. For most donors, the decision to give is based on the memory of what their alma mater used to be rather than the harsh reality of what it has become.


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There’s another thing academia does almost as well as leftist programming, and that’s fundraising. Universities have wizened up to the reality that the lion share of their major gift and legacy dollars are coming from a generation that may not appreciate the direction they’re heading in. They’ve learned to nimbly pivot, promising traditional-sounding programs and professorships by parroting donors’ values without truly believing in or supporting them.

If this sounds a bit cynical, take the experience of one of our colleagues who found herself

surrounded by university development professionals at a national planned giving conference. One university development attendee unashamedly asked the presenter how they could adapt their fundraising strategies to senior donors whose “old fashioned values” were an obstacle. An eye-opening discussion ensued. A sea of heads nodded in commiseration. Conservatives shouldn’t fall victim to the illusion that universities are doing more than paying lip service to our values. They aren’t upholding them now, and they’re far less likely to do so with your future legacy gift.

The consequences of allowing colleges and universities to go unchecked go far beyond campuses. The future of our republic depends on it. As so many Heritage supporters are now doing, you can help us take back our country by making sure new or existing gifts and legacies are working toward the preservation of America’s first principles, not their destruction.

For more information on how to create a true legacy of freedom for future generations, call us at (800) 409-2003, email us at legacy@heritage.org, or visit our planned giving website at heritage.giftlegacy.com. 



Click Here to Save America

IF YOU COULD MAKE A positive difference in the lives of those you love by simply picking up the phone or following a link, would it be worth a few minutes of your time?

As a matter of fact, you *do* have the power to leave a meaningful legacy of freedom, opportunity, and security for *millions of Americans* by naming Heritage a beneficiary of your IRA, insurance policy, or other designation account. The process is as easy as filling out a simple “change of beneficiary” or “transfer on death” form provided by your account custodian. Even better, since

these types of assets typically pass outside of a person’s will or living trust, **there’s usually no need to revise your will or seek the assistance of an estate planning attorney.**

Here are the most common ways to make a meaningful gift:

Retirement Accounts

Not only is it easy to make a charitable gift from your IRA, it may actually be tax advantageous to do so. Estate distributions to anyone other than a spouse—including children—may not only be subject to federal and state estate taxes, but income taxes as well. This means **more than 70**

percent of your hard-earned savings could be taxed away.

Instead of making our wasteful government your unintended heir, consider making a gift to Heritage.

Life Insurance

If your life insurance needs have changed over time—for example, grown children are no longer dependent on you for their needs—consider making a charitable gift of all or part of your paid-up policy. It will pass seamlessly to Heritage with minimal impact on the rest of your estate, yet the impact it will have on America is immeasurable. For families with dependents still in their care, consider naming Heritage a contingent beneficiary of your policy should something unexpectedly happen to them.

Commercial Annuities and Other Financial Accounts

Most commercial annuities, brokerage accounts, and even savings and checking accounts allow you to name a charitable beneficiary upon death. By doing so, you can ensure your gift passes directly to charity without the time and hassle of probate. If possible, let Heritage know of your plans so we are aware of your intent and will know who to contact when appropriate. 📞

Questions? Our planned giving team is here to help! Call us toll-free at (800) 409-2003 or email us at legacy@heritage.org.



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Disclaimer: The Heritage Foundation does not provide legal or tax advice; all material is presented solely as educational information. Examples of tax benefits are based on assumptions that might not apply to your individual circumstances. We recommend that you seek the advice of your attorney, tax advisor, and financial planner in connection with all gift and estate planning matters.

Thank You.

The Heritage Foundation thanks the newest members of the Heritage Legacy Society, listed below, for their leadership in creating a better America and leaving a legacy of freedom for future generations. Their commitment through their estate or other planned gift ensures that there will always be a strong voice for conservative principles in the nation's capital.

New Heritage Legacy Society Members

Dr. and Mrs. Gilbert F. Amelio	Mr. William T. Hughes	Mr. Richard Reome
Mr. Carl W. Anderson	Mr. Robert R. Jankelson	Mr. Edward J. Rifkin
Mr. George L. Anderson	Ms. Carol L. Johnson	Ms. Maureen N. Rogers
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