



The John Motley Morehead Planned Giving Society

Mr. Morehead believed that an investment in the education of young leaders would yield the greatest return and make the biggest difference in our world.

It was this conviction that led him to establish the John Motley Morehead Foundation in 1945 to support the scholarship program and to turn it into a permanent legacy through a substantial bequest in 1965. It is this same conviction that inspires the planned giving of alumni and friends.

In gratitude to “Uncle Mot” and to the alumni and friends who embody his spirit of generosity, the John Motley Morehead Planned Giving Society recognizes the legacy donors who provide a bright future for the Program.



We hope you will consider including Morehead-Cain in your long-term plans as a lasting way to express gratitude and extend opportunity to future generations of scholars.

[Turn over to learn more >](#)

Ways our alumni and friends have supported Morehead-Cain and Carolina:

NON-CASH PLANNED GIFTS	ADVANTAGES
Charitable bequest	Can be written into your estate documents as a set dollar amount or a percentage of assets. May reduce estate tax liability. Assets remain available for your use during your lifetime.
Beneficiary designations for retirement plans, life insurance, brokerage and bank accounts	Simple to implement. May reduce estate tax liability and avoid payment of income tax on retirement assets by heirs. Assets remain available for your use during your lifetime.
Charitable gift annuity	Fixed lifetime payments to you and/or others. Up to two annuitants receive income now with remainder to Morehead-Cain. Provides current income tax deduction and potentially provides additional capital gains tax savings.
Charitable remainder trust	Lifetime payments to you and/or others. Up to two beneficiaries receive income now with remainder to Morehead-Cain. Provides current income tax deduction and potentially provides additional capital gains tax savings. May be funded with real estate.
Life insurance, with Morehead-Cain as both owner and beneficiary	May be structured to provide a current or future benefit to Morehead-Cain. May provide current income tax deduction.
OTHER NON-CASH GIFTS	
Appreciated securities or real estate	Benefits Morehead-Cain immediately. Provides current income tax deduction and capital gains tax savings.
IRA charitable rollover *Must be at least 70 1/2 years of age	Benefits Morehead-Cain immediately. Counts toward required minimum distribution. Eliminates income tax on the distribution. An excellent option for those who do not itemize their taxes.
Charitable lead trust	Benefits Morehead-Cain immediately with remainder of funds to you or your heirs. Freezes taxable value of appreciated assets before they pass to beneficiaries. May provide tax savings opportunities.
Business interests and other non-traditional assets	Offer potential capital gains and/or income tax savings.

If you are interested in learning more about planned giving or sharing your current legacy plans with the Foundation, please contact David Greer at (919) 442-1640 or david@moreheadcain.org.