

INSEAD

The Business School  
for the World®

# Your Legacy to the World through INSEAD





“Let us do more than our share for the generation following us.”

Georges F. Doriot  
Founder of INSEAD

Leadership in business is to create an organized society whose accountable citizens share a community



# Make INSEAD part of your legacy

We all want to be connected beyond our own lifetimes with the values, causes and institutions we believe in. But it can be difficult to find a way to make a difference in the world that is truly impactful and long-lasting. Increasingly, alumni are choosing to leave a legacy to INSEAD.

Through these gifts, alumni express their deep bond with the school, their trust in its capacity to lead in management education, and their belief in its importance in the future. Such a commitment underscores their faith in the importance of this institution and its mission to educate global leaders who will help **develop a prosperous, peaceful and sustainable world**.

At a defining moment in its history, when the school is building the next phase of its impact through The Campaign for INSEAD, we ask you to consider making INSEAD a part of your legacy. Your vote of confidence will be extremely meaningful, not least because we understand that your decision will place INSEAD closely behind your considerations for family and loved ones.

A legacy gift will be a special source of strength and support for the school's future, enabling it to achieve long-term financial sustainability, as well as the agility to respond to arising needs and opportunities.

At a time of uncertainty, when our world is facing global challenges and technological advancements, you have the opportunity to create a wider impact. INSEAD's values of openness, diversity and academic rigour, along with its entrepreneurial spirit, are needed more than ever now and into the future. We will continue to develop tomorrow's leaders equipped with the right tools to navigate this rapidly changing world, while shaping **business as a force for good**.

We all hope to leave the world a better place than we found it. We ask you to entrust INSEAD to be the steward of your legacy. **Together, we can make a lasting difference.**

## An inspiring legacy

**Having guest speakers on a regular basis in class is one of the learning experiences made possible by the Avery Jühring MBA'67 Entrepreneurship Fund.**

Endowed, and therefore available in perpetuity, the Fund offers the Entrepreneurship faculty stable revenue every year, thereby giving them the flexibility to plan ahead and secure the best speakers for their classes. The impact on students is life-long.

Avery Jühring, MBA'67, an entrepreneur himself, decided to leave a legacy gift to INSEAD in order to strengthen the school's Entrepreneurship area. In his will, Avery donated funds from the sale of his Parisian apartment, which was used to establish an endowed fund for its entrepreneurship activities. As an American, domiciled in the US, this gift also helped Avery to simplify his estate for his family by leaving his French assets to the INSEAD Foundation, a registered French charity.

Avery's gift will continue to benefit and inspire INSEAD students of Entrepreneurship well into the future.



# Gifts that make a difference



"My year at INSEAD was a life highlight. Given the positive impact INSEAD has had on me, it is with pleasure that I have been able to give back.



**Teena Fazio**  
MBA'99J

"I hope that my bequest to INSEAD inspires others who share my view that giving to a top academic institution is a way to nurture enlightened and responsible future leadership. I'm convinced that legacy giving is one of the most effective ways to embrace challenges, and take care of our communities and the planet."



**Pier Paolo Raimondi**  
MBA'97D





"I decided to leave a legacy gift for INSEAD because I wanted to make an impact on the future success of this great school. The gift expresses my gratitude to the school, the people who built it and those who shape it every day. With my family, I discussed the future and how our contributions could make it better: we consider philanthropy and business to be 'a force for good' just like INSEAD is. Receive without forgetting – give without remembering."



**Lionel Sauvage**  
MBA'87J

# Why consider INSEAD in your will?

## You will empower INSEAD to advance business as a force for good into the future

INSEAD is a tremendous success story and continues to go from strength to strength. Nevertheless, the school competes with institutions that have vast endowment funds and strong traditions of legacy giving. It is a simple fact that fees and annual donations are not enough. We know that if more alumni express their support through legacies and other significant forms of giving, we can make a greater difference throughout the world, now and for generations to come.

## You will gain tax advantages

By giving to a charitable or non-profit organisation, your estate can benefit from significant tax advantages in many countries. INSEAD has charitable trusts around the world; please contact us to find out more. Additionally, we recommend that you consult your financial advisors for the conditions in your own tax and legal jurisdiction.

## You will become a member of the Georges and Edna Doriot Society

The Georges and Edna Doriot Society recognises legacy donors during their lifetimes. You will be invited to exclusive society events and receive regular updates from the school. There is no minimum amount, no obligation to remain a member and no 'proof' of legacy required. Simply send us written confirmation that you have included a gift to INSEAD in your will. The form at the back of this brochure is a simple way to do this.

# Discussing your plans

When you leave a gift to INSEAD in your will, you have the option to make an unrestricted gift, or choose to direct it to a specific area or initiative.

The following are examples of legacies to consider. All of these are commonly made to charitable organisations across the world with full or partial tax relief. We recommend that you check the conditions in your own tax and legal jurisdiction.

## Through your will

Wills are generally simple and inexpensive to write and change. By making a gift to INSEAD in your will, you can ensure that an institution which meant so much to you during your lifetime will continue to benefit from your generosity many years into the future.

## Bequests

**A residuary bequest:** all or a percentage of your remaining estate, after other legacies and expenses have been paid out (for example to family and friends), goes to INSEAD.

**A pecuniary bequest:** This is a gift of a fixed sum of money for the benefit of INSEAD.

**A reversionary bequest:** This is a gift of assets for INSEAD's benefit, subject to the rights of a named individual or individuals to receive the benefit of those assets during their lifetime. For example, you could leave a house to an INSEAD charitable trust on condition that a family member can continue to live there for the rest of his or her life.

## Life assurance policy or pension plan

In many countries, an INSEAD charitable trust can be named as a beneficiary of certain financial products - such as a life assurance policy or a pension plan - without incurring tax. There may be other possibilities in your country and we would be happy to discuss these with you.

## Gifts of property, shares and other securities

These gifts are also eligible for both inheritance and capital gains tax relief in many jurisdictions, when bequeathed to an INSEAD charitable trust.

# Please act today for the future

We hope the information here has been helpful to you. You can use the enclosed form to request information about how to make or amend your will, including suggested wording, along with specific information for your country. Please be assured that any information you share with us will remain confidential.

We would like to thank all those alumni, participants and INSEAD families who appear in this brochure.

Please note that the information contained in this publication and attached inserts is intended only as general guidance and is no substitute for expert legal advice. INSEAD cannot accept responsibility for actions taken as a result of these documents and errors resulting from changes in the law.

**INSEAD Europe Campus**

Boulevard de Constance  
77305 Fontainebleau Cedex, France  
Tel: +33 (0)1 6072 4000  
Fax: +33 (0)1 6074 5500

**INSEAD Asia Campus**

1 Ayer Rajah Avenue  
Singapore 138676  
Tel: +65 6799 5388  
Fax: +65 6799 5399

**INSEAD Middle East Campus in Abu Dhabi**

Al Khatem Tower, ADGM Square, Al Maryah Island  
PO Box 48049,  
Abu Dhabi, United Arab Emirates  
Tel: +971 2 651 5200  
Fax: +971 2 443 9461

**[www.insead.edu](http://www.insead.edu)**

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