# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome Letter from the Dean</td>
<td>1</td>
</tr>
<tr>
<td>Thank You from Alumni Relations</td>
<td>2</td>
</tr>
<tr>
<td>Alumni Relations Contact Information</td>
<td>3</td>
</tr>
<tr>
<td>Class Agent Job Description</td>
<td>4</td>
</tr>
<tr>
<td>Class Agent Participation Timeline and Checklist</td>
<td>5</td>
</tr>
<tr>
<td>Reunion Weekend Timeline</td>
<td>7</td>
</tr>
<tr>
<td>Class Scholarship Funds</td>
<td>8</td>
</tr>
<tr>
<td>Asking Classmates to Make a Class Scholarship Gift</td>
<td>10</td>
</tr>
<tr>
<td>How to Make Your Gift</td>
<td>11</td>
</tr>
<tr>
<td>Planned Giving Information</td>
<td>12</td>
</tr>
<tr>
<td>Frequently Asked Questions: Class Giving</td>
<td>13</td>
</tr>
<tr>
<td>Sample Class Scholarship Letter</td>
<td>14</td>
</tr>
<tr>
<td>Class Gift Phone Call Template</td>
<td>15</td>
</tr>
<tr>
<td>Sample Thank You and Follow-up Note</td>
<td>16</td>
</tr>
</tbody>
</table>
The medical alumni of the University of Michigan are a source of great strength throughout the world where the practice of medicine and conduct of research is advancing the future of health care. Having studied medicine or completed residencies or fellowships at one of the most respected academic research institutions in the country, our alumni continue to demonstrate the exceptional achievement and dedication for which graduates of the University of Michigan are known.

There are many ways to remain involved with the University of Michigan as alumni, and countless reasons to do so. I invite you to continue your relationship with us as a valued member of our family of victors.

James O. Woolliscroft, M.D. (Residency 1980)
Dean, University of Michigan Medical School
Lyle C. Roll Professor of Medicine
Dear Class Agent,

Thank you for your dedication and participation. Class agents ensure the Michigan experience continues by keeping classmates connected, informed and engaged. The personal contacts you make with your fellow classmates will help to increase Reunion attendance and will influence the next generation of leaders and best by promoting fundraising and philanthropy.

We hope this manual will serve as a useful reference tool when speaking and interacting with your medical school peers. Please do not hesitate to contact us should you have any questions or need further assistance.

The Reunion experience wouldn’t be the same without the help of dedicated class agents, and we thank you for being a leader of your class. We look forward to working with you in the upcoming months and celebrating with you here in Ann Arbor. Go Blue!

Kind Regards,

Gina Jennings
Director, Alumni Relations
ALUMNI RELATIONS CONTACT INFORMATION

Alumni Relations Team
medalumni@umich.edu
www.alumni.medicine.umich.edu
UMHS Office of Development and Alumni Relations
1000 Oakbrook Drive, Suite 100
Ann Arbor, MI 48104

Gina Jennings, Director
Regional Receptions
734-998-7597
gjenning@umich.edu

Therese Apostoleris, Alumni Relations Officer
Volunteer Opportunities and Student Programs
734-763-5279
tmsapost@umich.edu

Nancy Johnson, Alumni Relations Officer
Reunion Activities, Class Giving and Class Agents
734-764-3836
jnanlynn@umich.edu

Trish Roma, Alumni Relations Coordinator
MCAS Board, Distinguished Alumni Awards
734-763-5103
trishro@umich.edu
Role and Responsibilities
The class agent is responsible for providing leadership to classmates, encouraging Reunion attendance and leading the fundraising efforts of his or her class gift. Every year the U-M Medical School invites medical classes celebrating their five-year anniversaries to return to campus for Reunion. The class agents are tasked with contacting fellow classmates to encourage their participation in Reunion activities and inviting classmates to support the class scholarship gift. The most important role of a class agent is to reunite classmates with each other and with the Medical School.

In 2014, we reinstituted a class giving program during Reunion. In that year, we raised $96,895! We invite you, as class agents, to be leaders by setting a class fundraising goal and encouraging your classmates to participate. Through your class scholarship fund, you can impact that lives of future students and can honor your class’s legacy in perpetuity with the University of Michigan Medical School.

All gifts to the university are important and make a tremendous impact. Your class fund has already been established — we just need your help getting contributions! For more information about establishing your class giving goal, and to learn about giving options, please see the "Class Scholarship Funds" (page 8) and "Frequently Asked Questions" (page 13) sections of this toolkit.

Many classes continue to maintain a high level of communication during non-Reunion years. We encourage you to gather and celebrate with your classmates in the years you do not celebrate a five-year milestone. Continued communication with classmates strengthens the bonds formed at milestone Reunions, which increases enthusiasm and future participation in activities and in class giving. Classes that achieve the most success are often led by class agents who choose to encourage and maintain ongoing interaction.
CLASS AGENT PARTICIPATION TIMELINE & CHECKLIST

April – May

☐ Read Reunion Class Agent Volunteer Toolkit by **4/22/2015**

☐ Help recruit additional classmates interested in volunteering as a class agent; provide names to Therese Apostoleris (734-763-5279 or **tmsapost@umich.edu**)

☐ Participate in one of the April conference calls with 2015 class agents and the Alumni Relations team
  ▪ Dial-in number: 1-800-689-9374
  ▪ Participant passcode: 336586#
  ▪ Scheduled call times:
    ▪ Wednesday, April 22, 2015: 8 p.m. EST
    ▪ Wednesday, April 29, 2015: 7 p.m. EST
    ▪ Thursday, April 30, 2015: 7 p.m. EST

☐ Review Reunion class scholarhip letter by **5/15/2015** (mailed from Alumni Relations in mid-May on your behalf)

☐ Through email or a conference call (Alumni Relations can coordinate your call arrangements), do the following:
  ▪ Divide class list between class agents
  ▪ Determine chair for class fund
  ▪ Set a goal for your class gift

☐ Begin contacting your classmates and work together to locate all classmates

☐ Keep other class agents informed of relevant class news you receive from peers

☐ Modifications of class scholarhip letter due to Alumni Relations staff by **05/15/2015**

☐ Register for Reunion starting **05/31/15**. Reunion brochure will arrive in late May.

☐ Continue personal contact to encourage registration and gifts to the class fund

☐ Encourage your classmates to start gathering photos, memorabilia, recording memories, etc. to share/display during Reunion

June – August

☐ Make a personal contribution to your class gift if you haven’t already done so

☐ **6/15/2015**: All classmates should have received a first contact by class agents

☐ Continue to contact classmates and encourage registration and participation in class fund

☐ **7/1/2015**: Class agents should be registered to attend Reunion

☐ Send personal thank you notes to classmates who have made gifts to the class fund
September
☐ Send encouraging notes to help excite classmates attending Reunion
☐ Continue to share participation and total giving progress to the class scholarship fund

October – December
☐ Attend Reunion weekend activities
☐ Connect with classmates and provide an update about the class fund at your class dinner
☐ Complete the online Reunion survey you will receive through email and encourage classmates to do the same
☐ Help to identify officers for your next class Reunion and submit to Alumni Relations by 11/15/15
☐ Participate in post-Reunion activities:
  ▪ Send updates to classmates on the progress of your class fund
  ▪ Encourage classmates to continue giving to your class fund
  ▪ Encourage continued conversations between classmates after Reunion weekend
  ▪ Encourage classmates to get together between Reunion years
Thursday, October 8, 2015:

- Walking Tour of C.S. Mott and Von Voigtlander Hospitals
- 2015 Distinguished Alumni Awards Celebration
- Alumni Welcome Reception: a strolling dinner celebrating the 2015 MCAS Distinguished Alumni Award Winners

Friday, October 9, 2015:

- Faculty Presentations
- Student Panel Discussion
- Reunion Luncheon with Dean James O. Woolliscroft, M.D. (Residency 1980)
- Bus Tour of U-M Health System and campus
- Walking Tour of the newly renovated Taubman Health Sciences Library
- Class Dinners: Michigan Union and Michigan League (bus transportation will be available from the Marriott)

Saturday, October 10, 2015:

- Tailgate
- Football Game: Michigan vs. Northwestern
Classes that set a class giving goal of $100,000 or more can establish a Named Endowed Legacy Scholarship, which will provide support for a student in perpetuity. For goals of less than $100,000, the class will create an expendable Class Scholarship Fund. These two options are listed in more detail below.

**Class Scholarship Funds**
The Class Scholarship Funds were developed to support University of Michigan Medical School students. Scholarship support is more important than ever, and having funding available helps us attract the brightest and best students. Several factors, including the increasing complexity of medicine and declining public funding, have driven up tuition costs. The generosity of alumni and other scholarship donors has allowed the Medical School to defray the cost of medical education by providing scholarships — but with your help we can do so much more.

The U-M Medical School’s goal is to one day have the endowed resources to support each and every one of our students. While our students continue to graduate with top-rated educations, many face significant debt upon graduation. For an in-state medical student, the average annual expense at the University of Michigan totals more than $54,000. Out-of-state student annual expenses now approach $72,000 per year. Students today graduate from the Medical School with an average debt of $125,000.

A scholarship gift to the Medical School is a wonderful way to relieve some of these debt burdens, freeing students to pursue whatever medical career they choose. As a class agent, personal letters and conversations with your classmates are a vital part of the success of our class giving fundraising. Reaching out to your peers emphasizes the connection they feel with the Medical School and your efforts greatly increase their giving.

**Named Endowed Legacy Scholarship**
A named endowed scholarship is a permanent fund that carries the name of the benefactor — in this case, your class year. This named fund will forever be connected to your class. Endowed scholarship opportunities in the Medical School include:

- $100,000 — provides a student with approximately $4,600/year toward their tuition
- $350,000 — provides a student with approximately $15,750/year toward their tuition
- $700,000 — fully funds four years of tuition for an in-state student
- $1,200,000 — fully funds four years of tuition for an out-of-state student
University of Michigan Medical School by the Numbers
We've compiled some of the most important facts for you to reference when talking to your classmates. Please feel free to contact us if you have any questions.

Class of 2014:
• 5,776 — the number of applications received (a 6.2% increase from 2013)
• 578 — the number of applicants invited to interview
• 177 — the number of admitted incoming students
• 94 female (53.1%) and 83 male (46.9%) students
• 84 Michigan residents (47.5%)
• 93 non-Michigan residents (52.5%)
• Tuition for the 2013-14 academic year:
  ▪ $30,286/year: Michigan residents
  ▪ $48,228/year: non-Michigan residents
• The average debt for students in the graduating class of 2013 was $125,000
• In fiscal year 2013,
  • the Office of Financial Aid awarded an average scholarship of $21,757, and an average need-based grant of $9,551
ASKING CLASSMATES TO MAKE A CLASS SCHOLARSHIP GIFT

Class fundraising is a great way for your class to honor each other and celebrate your achievements. The class fund often becomes more meaningful when classmates encourage each other to contribute, and when class agents personally thank classmates for the gifts made. Class agents lead by example. Plan to make your gift before you ask anyone else to do so. Stay informed — the more you know about the university, the easier it will be to ask your classmates to participate in giving. Take the time to truly talk to your classmates and enjoy the opportunity to catch up with one another.

Tips for Encouraging a Classmate to Give

Step 1: Reconnect
Reconnect with each other through phone calls, letters and emails. Reunion provides the opportunity to reconnect with the friends with whom you shared Medical School experiences. Help your classmates build excitement for attending Reunion by listening to the stories and memories they share. Call the classmates you know the best first — this will increase your level of comfort with the process. Invite your fellow classmates to reach out to the classmates they knew best as well.

Step 2: Reaffirm
Reaffirm your commitment to Michigan. Inform your classmates about the class fund opportunity and invite them to join you in making a gift. Share with your classmate how important participating in the class fund giving program is for the Medical School and for the next generation of students.

Step 3: Rediscover
Rediscover your class spirit. Instill a desire for your class to raise the most dollars and have the highest percentage of class giving among the Medical Schools classes.

Step 4: Remember
Consider sharing why you contributed to the class fund and encourage your classmates to contribute as well. Remember to thank them personally for their giving. A handwritten thank you note is a wonderful way to recognize their gift.
HOW TO MAKE YOUR GIFT

There are many ways for you and your classmates to make gifts to the University of Michigan Medical School. Alumni celebrating their Reunion can contribute to their class gift by using the Reunion registration form that will arrive in late May, as well as with the envelope and gift response card provided in their Reunion scholarship letter. Gifts can also always be made online. To do so, please visit: www.alumni.medicine.umich.edu.

Personal Checks may be made payable to:
"The University of Michigan"
Memo line: "YYYY Medical School Class Scholarship Gift"

Checks may be mailed to:
UMHS Office of Development and Alumni Relations
Attn: Gift Processing
1000 Oakbrook Drive, Suite 100
Ann Arbor, MI 48104

Stock Transfers:
Julie Clauda, Securities Manager & GRA Liaison
734-647-7779
Development Services and Strategic Solutions
3003 S. State Street, Suite 900
Wolverine Tower
Ann Arbor, MI 48109-1288
PLANNED GIVING INFORMATION

Bequests
By naming U-M as the beneficiary of an IRA, 501k or 503b or a percentage thereof, it will pass to U-M tax-free. Naming U-M as a beneficiary of a retirement account often requires little more than filing paperwork with your plan custodian.

Life Income Gifts
Charitable Gift Annuity (minimum gift $10,000)
A charitable gift annuity (CGA) is a simple contract between you and the University of Michigan. The CGA provides fixed, guaranteed income to you and a loved one for your lifetimes, starting now or at a future date of your choosing. The University of Michigan offers gift annuities to income beneficiaries beginning at age 50.

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<td>$510</td>
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<tr>
<td>80</td>
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<td>$680</td>
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<tr>
<td>85</td>
<td>7.8%</td>
<td>$780</td>
<td>$5,622</td>
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Charitable Remainder Unitrust (minimum gift $100,000)
A charitable remainder unitrust is established for and tailored to an individual’s circumstances. It holds assets and pays income either for life (for individuals aged 50 or better) or a term of years (to individuals of any age) to you or loved ones. A charitable remainder unitrust has the potential to grow over time, which can provide a hedge against inflation. Income rates are determined on a case-by-case basis with a minimum equal to 5 percent. Trusts may be funded with cash or securities.

For additional information, please contact:
Sally Baker, Senior Director of Gift Planning
734-763-1408
sallanne@umich.edu
UMHS Office of Development and Alumni Relations
1000 Oakbrook Drive, Suite 100
Ann Arbor, MI 48104
What is a Reunion gift?
Classes often come together in their Reunion year to contribute a class Reunion scholarship gift to the Medical School. In this toolkit, we refer to class Reunion gifts as "class gifts." We encourage all alumni to support medical students each year by giving a gift to their specific Class Gift Scholarship fund.

What funds do Reunion gifts support?
Your generous gifts support the Medical School Office of Financial Aid in providing scholarship assistance to Medical School students. Many classes set a goal of endowing their class year with a legacy scholarship.

How big do gifts have to be?
All gifts to the university are important and have a tremendous impact, and every gift makes a difference! Classes that collectively give $100,000 or more can establish an endowed scholarship, which will provide financial support to students in perpetuity. No matter the amount, as alumni, your gifts will continue to attract the best and brightest medical students to the University of Michigan Medical School. Together, your class giving over the years will be very meaningful to the Medical School and future students.

Can gifts be made anonymously?
Yes, please have your classmate indicate this information when making their gift.

What is the cut-off date for making a gift?
Your generous gifts will be accepted at any time. As a matter of fact, we ask that your class continue to set goals and give in the years between reunions. Over time, your class fund will continue to grow! We ask that you consider making your Reunion year gift by October so that we can report on your progress and success during Reunion weekend.

Can classmates make estate and other planned gifts?
Yes! Planned giving is a method of supporting the University of Michigan that often combines current giving with long-term financial and philanthropic goals. For more information, please see the "How to Make Your Gift" section of this toolkit.
Date
Name
Street Address
City, State Zip

Dear Dr. ,

We hope this letter finds you well and that you are looking forward to our XXth University of Michigan Medical School Reunion Weekend, which will be held on October 8-10, 2015. It will be great to reconnect and find out what everyone’s been up to since 19XX. Much has changed in the medical profession — and no doubt in your own life as well.

The times we all spent at the Medical School were special — filled with great friends, grueling schedules and exceptional opportunities to become the best physicians in our chosen fields. It’s now your chance to provide that experience to future generations of the leaders and best.

The University of Michigan Medical School has truly made a difference in our careers by helping shape who we are today — a sentiment reinforced by the thousands of young people who apply to the school every year in the pursuit of a world-class education.

These future physicians come to U-M for its reputation. It is a hotbed of innovation and a place where groundbreaking research and extraordinary patient care happens every day. The best-of-the-best continue to come here, despite the escalating cost of a medical education across the country, which can burden students with more than $125,000 of debt after graduation.

That is why our class is spearheading a bold effort to help alleviate some of this crushing debt by establishing an annual scholarship fund to support an incoming U-M medical student. Donors to the fund will receive updates about the student and his/her progress and even have the opportunity to meet him/her.

Please consider making a gift that honors our class and lightens the financial burden for a U-M medical student — think of the impact we could make on a student’s life if every member of our class gave to the fund! Please use the attached form to make your donation.

Thanks for your consideration and see you in October!

Best,
Your Medical School Class of 19XX Class Agents

P.S. When we reach our $100,000 fundraising goal, these class gifts may be used to establish an endowed scholarship fund. Distributions from the fund will be made in accordance with the university’s endowment distribution policy. Any surplus distributions during any period may be accumulated for later use for the above purposes or may be added to the principal of the fund for investment, at the university’s discretion.
CLASS GIFT PHONE CALL TEMPLATE

Hi, <insert alum name>. This is <your name>. We graduated together from Michigan Medical School in 19XX.

- How are you doing?
- What have you been doing since we last saw each other?

<insert alum first name>, I’m serving as a class agent for our XXth Reunion this year. I hope you’re planning on attending in October. Have you registered?

- When is the last time you were back in Ann Arbor?
- Have you seen the newest additions on the medical campus? Mott Hospital?
- Did you know they are renovating the Taubman Library? We will be the first reunioning class to tour the new facility!

Yes, I’m attending:

<insert alum name>, I can’t wait to see you in October! I’m hoping we can get most of our class to return. We would love for you to reach out to the friends you were close with and ask them to come back, too!

I’d also like to make sure that you know about our class scholarship fund. I’m helping our class reach our fundraising goal of $XXX,XXX this year, which is very important for ensuring Michigan remains one of the top medical schools in the country. Contributing is a great way for us to honor the Medical School, each other and to celebrate our own personal achievements. I made my gift to celebrate our XXth reunion year — will you join me and contribute? I will send you some info about it and hope you’ll take a look.

No, I’m not able to attend:

<insert alum name>, I’m sorry to hear you can’t make it back to this Reunion in October. Hopefully we will get to see you at the next reunion. Until then, would you consider honoring our XXth reunion year with a gift to the class scholarship fund? It’s a great way for you to celebrate and help Michigan Medical School continue to attract the brightest and best students!
SAMPLE THANK YOU LETTER

Dear <insert alum name>,

Thank you for your generous support of our class scholarship fund in celebration of our XXth reunion. It's a great way for us to honor our class and our university. I’m looking forward to seeing the continued success of our class fund throughout the years as we continue to give together. The class of 19XX can accomplish great things! I hope to see you back in Ann Arbor in October as we celebrate our XXth Reunion.

<yourse name>, Class of XXXX

SAMPLE CASUAL FOLLOW-UP NOTE

Dear <insert alum name>,

It was great having a chance to catch up with you last week. I’m looking forward to seeing you at Reunion in October! It will be exciting to get together with our classmates and reminisce. I hope you will continue to consider making a gift to our class scholarship funds, I truly believe that together our class is capable of making a difference. Every gift matters and we’ll be competing with other classes to have the highest class participation rate. Let me know if you have any questions.

If we don’t talk before then, I’ll see you in October.

Go Blue!

<yourse name>, Class of XXXX

(Remember, Alumni Relations will provide you additional notecards upon request)
Thank you for serving as a Class Agent and helping to make this Reunion one of the best we've ever had!