**Institutional Advancement Mission**

To advance the aims and ideals of Phillips Exeter Academy by securing financial and volunteer resources and fostering a lifelong connection between the Academy and its alumni and parents.

**Class agent goals**

- Increase class participation;
- Increase class dollars raised for The Exeter Fund;
- Keep classmates connected to and engaged with the Academy;
- BE A LEADER; make your own gift to The Exeter Fund before asking your classmates;
- ASK classmates for gifts to The Exeter Fund;
- THANK classmates who have given to The Exeter Fund;
- SHARE Academy news with classmates and classmate news with PEA.

**Important dates**

- **July 1, 2017 – June 30, 2018**: Fiscal year, Exeter Fund 2017-2018
- **September 22 – 23, 2017**: Exeter Leadership Weekend
- **December 6, 2017**: Exeter’s Giving Day (using GiveCampus)
- **December 31, 2017**: Last day to make a gift for the 2017 tax year
- **January 2018**: Send thank you notes to classmates who have already given
- **February 2018**: Valentine’s Day Appeal
- **April 2018**: Spring Giving Day (TBD) – Decades Challenge (using GiveCampus)
- **June 1, 2018**: Suggested pledge fulfillment date
- **July 2018**: Send thank you notes

**Did you know?** Opening in 2018: A new 84,574 square-foot Field House including a 200-meter flat track, dedicated NCAA-regulation areas for shot put, high jump, long jump, and pole vault, four tennis courts, two batting cages, bleacher seating for approximately 500 spectators and a wrestling room.
Endowment by Purpose Restriction
As of June 30, 2017

Did you know? It would require an additional $140 million in endowment to generate the unrestricted current use funds that come from The Exeter Fund.
The importance of the work you do...

We need you.

The Exeter Fund provides vital, flexible-use resources that enable the Academy to sustain the hallmarks of an Exeter education, including small class sizes, a superb faculty, and facilities and programs that allow students to achieve at a high level. Indeed, Exeter’s margin of excellence depends largely on the success of the fund, which accounts for approximately 8 percent of the school’s yearly operating budget.

For these reasons, the Exeter Fund is the Academy’s top financial priority and a major philanthropic focus for thousands of alumni, parents and volunteers.

- The 12:1 student-teacher ratio in the classroom (and 5:1 ratio on campus) that makes the Harkness table, and those around it, really work.
- An admissions program that actively recruits worldwide to form a diverse, inclusive student body. In the 2017-2018 academic year, Exeter students hailed from 44 states, the District of Columbia, Puerto Rico and 30 foreign countries.
- The ability to ensure that the Academy truly attracts youth from every quarter by offering a free Exeter education to qualified students whose families earn $75,000 per year or less.
- A portion of ESSO’s operating budget comes from tuition and unrestricted giving, providing students hundreds of non sibi opportunities to serve each other, this community and the world each year.
- Exeter’s counseling services, which help students through difficult times and teach proper mind/body balance for life, is mostly funded by The Exeter Fund and other unrestricted sources of income.

To attend Exeter for the 2017 – 2018 academic year costs $49,880 for boarding students (including tuition and fees), and $38,740 for day students (including tuition and fees). Yes, the actual cost of educating an Exeter student this year is $90,825, which means that every child at Exeter is subsidized in some way by our endowment. What’s more, almost all of Exeter’s financial aid ($22,316,908 in 2017 – 2018) comes from endowed funds that are restricted specifically for that purpose.

And while it is true that Exeter has a significant endowment built up over 237 years, the Academy has a moral obligation to manage this principal carefully in order to preserve its purchasing power for future generations of Exonians. As such, only about one half of the Academy’s annual operating expenses are derived from this reserve, with approximately
30 percent more coming from tuition dollars. Each year, this leaves a gap that must be filled with unrestricted gifts like yours – flexible gifts that can be put to use immediately to ensure that our students and faculty thrive.

We need you.

All gifts matter and are gratefully acknowledged.

Just like the voices around our Harkness tables.

Just like your voice from when you were a student, and today, as Exeter alumni.

Recognition Societies — Leadership, Loyalty, Lifetime, Legacy

Exeter would not exist, or be the remarkable school it is today, without the philanthropic foresight of you, our loyal alumni, families and friends. To show our appreciation for your enlightened generosity and all that it makes possible here at the Academy, we have created the following donor recognition societies:

1781 Leadership Society

Alumni, family and friends who contribute $2,500 or more to the Academy in a single fiscal year are considered members of the 1781 Leadership Society. Year in and year out, we rely on these donors to buoy us, and we thank them for their visionary support.

Please Note: The giving level for the 1781 Society has increased from $1,781 to $2,500

Founders Circle $100,000 and above

Those members of the Exeter family who give $100,000 or more to the Academy are welcomed into the Founders Circle. Their generosity echoes that of our founders, John and Elizabeth Phillips, and marks them as donor pioneers.
Principal’s Circle $25,000 – $99,999
Like the Academy’s principal instructors, who for nearly two and a half centuries have led this institution and its faculty and students, Principal’s Circle donors are philanthropic standard-bearers. With gifts of $25,000 to $99,999, they significantly impact this community while simultaneously raising the bar for others.

Academy Circle $5,000 – $24,999
Donors whose growing capacity allows them to make gifts of $5,000 to $24,999 are welcomed into the Academy Circle. Gifts at this level bolster The Exeter Fund, and by extension every single student and instructor at the Academy.

Exonians Circle $2,500 – $4,999
A source of both pride and connection, the Exonian identity is the mortar that holds together our remarkable alumni family. Individuals who make gifts of $2,500 to $4,999 provide us with the critical support we need to continue educating tomorrow’s leaders and are welcomed to the Exonians Circle.

Big Red Club
Guided strongly by the principle of non sibi, Exeter’s youngest classes continue to amaze us with their burgeoning philanthropy. In order to honor their efforts, we have created the following three donor categories, known collectively as the Big Red Club:

- Alumni through their 5th Reunion $250 or more
- Alumni through their 10th Reunion $1,000 or more
- Alumni through their 15th Reunion $1,500 or more

**Lion Rampant Society**

*A Loyalty Society*

*Since Grad Donors*
Donors who have loyally given back to the Academy every year consecutively, since graduation. Donations of all amounts are recognized.

Five Consecutive Year Donors
We recognize with membership in the Lion Rampant Society those donors who make loyal gifts of any size to the Academy. Their annual contributions are foundational to our mission, and, like our mascot, demonstrate the strength of our community.
Harkness Society

A Lifetime Society

Harkness Society donors are recognized for their compelling generosity to Phillips Exeter Academy. We welcome to this society any donor who has contributed $1 million or more during his or her lifetime. Like Edward S. Harkness, these donors have, through their benefaction, changed the course of Exeter’s history.

Heritage Circle

A Legacy Society

Alumni, family and friends who indicate that they have made provisions for the Academy in their estate or retirement plans are designated members of our Heritage Circle.

Ways to Give

ONLINE: www.exeter.edu/give
TELEPHONE: 603-777-3473
MAIL:
Gift Recording Office
Phillips Exeter Academy
20 Main Street
Exeter, NH 03833-2460

STOCK or MUTUAL FUNDS: If classmates are considering a gift of appreciated stocks or mutual funds please have them email stockgift@exeter.edu or call 603-777-3473.

PLANNED GIFTS: Please direct classmates interested in discussing a planned gift to contact Phil Perham, Director of Planned Giving at 603-777-3594 or visit the website at www.exeter.planyourlegacy.org

The IRA Charitable Rollover, once a temporary IRS provision, has been permanently signed into law. What this means for you: Individuals who are at least 70 ½ by December 31, 2017 can donate up to $100,000 to Exeter directly from their individual Retirement Account (IRA) and the distribution will not be treated as taxable income. In addition, any amount distributed under this rule will count toward the donor’s annual Required Minimum Distribution (RMD).
Increasing the Impact

MATCHING GIFTS: Encourage your classmates to double—or even triple!—their gift to Exeter by having their employer match their donation. Utilize the following link to see if your classmates’ employer matches gifts: www.matchinggifts.com/exeter

RECURRING GIFTS: Classmates can schedule an annual or monthly charge to their credit card. Encourage them to go online at www.exeter.edu/give and select “I would like to set up a recurring donation.”

Agentsphere

A GREAT VOLUNTEER TOOL! www.agentsphere.net/exeter

- Receive your log-in invitation from The Exeter Fund office to get started.
- Access to a list of your class, including contact information.
- Allows you to send emails directly to classmates or the entire class.
- Provides giving detail of classmate giving: current, LYBUNT, SYBUNT, occasional and never.
The Exeter Fund Office

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