

A PLAN THAT COUNTS



THE UNIVERSITY OF
CHICAGO

Office of
Gift Planning

As the University of Chicago pursues its largest-ever fundraising campaign, the support of alumni, parents, family, and friends is crucial to reach its ambitious goals. Your planned gift can count toward the University of Chicago Campaign: Inquiry and Impact.

By arranging a gift through your financial and estate plans, you ensure that the University remains one of the world’s greatest centers of discovery, education, and influence for generations to come. Explore the ways to have a meaningful effect on the University’s future with a gift that best fits your philanthropic goals and financial situation.



WAYS TO GIVE

Gift planning offers many options to provide for the University as well as yourself or your loved ones.

BEQUEST | A future gift from your will or living trust.

BENEFICIARY DESIGNATION | A future gift from your retirement plan, life insurance policy, or financial account.

LIFE-INCOME GIFT | An outright gift to fund an annuity or trust that pays you annual income for life.

RETAINED LIFE ESTATE | A future gift of real estate that allows you continued use of the property for life.



Since 2000, more than 3,000 alumni, parents, family, and friends have planned a gift to support the University, accounting for 20 percent of the value of all gifts received.



Use appreciated securities for a higher income tax deduction than your original cost.

WHAT TO GIVE

Gift planning allows you to use different types of assets to receive the appropriate benefits for your situation.

CASH | Reduce your taxable income by the given amount.

SECURITIES | Avoid capital gains tax if held for more than one year.

RETIREMENT ASSETS | Reduce or avoid estate and income taxes.

REAL ESTATE | Use or receive income from your property for life.

PERSONAL PROPERTY | Reduce your taxable income by the fair market value.

WHEN TO GIVE

Gift planning can happen at any time, but typically coincides with

- income tax planning for tax deduction purposes;
- the process of planning your estate, when making important decisions about your and your family’s future.

Or with a significant life event, such as

- marriage, divorce, or the birth or death of a family member;
- retirement;
- a large influx of taxable income such as a bonus, sale of a business, a successful investment, or an inheritance.



Some planned giving options have no effect on your current finances. Almost anyone can make a planned gift.

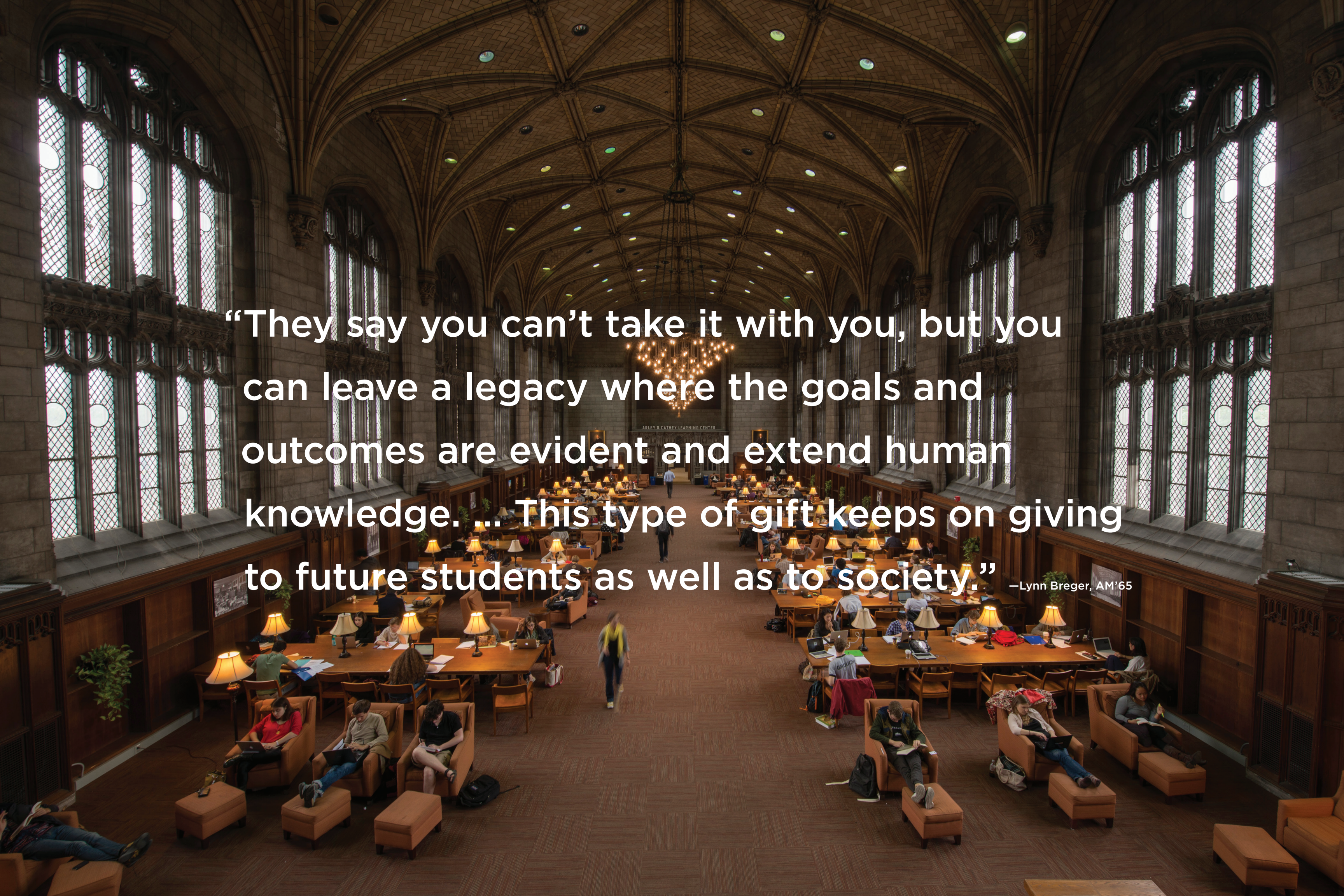


Documenting your bequest does not make it binding or irrevocable—you still have the liberty to revise your estate plan if your circumstances or priorities change.

COMMUNICATE YOUR WISHES

Sharing your financial and estate plans with the University ensures that your wishes will be met and allows us to express our gratitude during your lifetime while assisting the University’s long-term planning efforts and encouraging others to give by bequest. To document your bequest, please provide

- a copy of the relevant section of the will, living trust, or beneficiary designation form;
- a copy of the signature page;
- a copy of the page indicating the date of the document;
- an estimated value of the bequest, if not stated as a dollar amount in the document.



“They say you can’t take it with you, but you can leave a legacy where the goals and outcomes are evident and extend human knowledge. ... This type of gift keeps on giving to future students as well as to society.”

—Lynn Breger, AM’65

QUICK PLANNER

	Bequest	Charitable Gift Annuity	Charitable Remainder Trust	Beneficiary Designation	Retained Life Estate
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I would like to make a gift

During my life		X	X		X
Upon my death	X			X	

I have the following assets available to make a gift

Cash	X	X	X		
Securities	X	X	X		
Real estate	X		X		X
Retirement plan				X	
Life insurance policy				X	
Financial account				X	
Other	X				

Benefits that are important to me are

Income		X	X		
Income tax deduction		X	X		X
Estate tax savings	X	X	X	X	X
Capital gains tax savings		X	X		
Avoid probate		X	X	X	X
Lifetime control of assets	X			X	X

If my gift provides income, I prefer that it is

Fixed		X	X		
Variable			X		

“A gift like this is a very personal matter that requires inspiration and detailed assessment. We encourage others with like mind to donate to this great University and help sustain it.”

—Jeffery Puschell, AB’75, and Dana Puschell



All donors who support the University through a planned gift are welcomed into the Phoenix Society. Tell us if you have provided for the University in this way to become a member today.

VISIT phoenixsociety.uchicago.edu
EMAIL phoenixsociety@uchicago.edu
CALL 866.241.9802



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Office of
Gift Planning

For more information about
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These materials are intended to provide general information that we hope will be helpful to you in your tax, estate, and charitable planning. It is not intended as legal advice and should not be relied upon as such. Figures, calculations, and tax information are based on federal tax laws, regulations, rulings, and rates applicable at the time such information was prepared and are for illustration purposes only. Individual state laws may affect the availability of gift annuities. For advice or assistance with your particular situation, you should consult an attorney or other professional adviser.