One of the simplest ways to give is by naming the University as a beneficiary of a retirement plan, life insurance policy, or financial account. You can designate the University as a primary, contingent, or cobeneficiary.

i If you are married, you need a spousal consent form to name anyone other than your spouse as the death beneficiary of your 401(k) or pension plan.

**BENEFITS**

**Flexible:** You can change your beneficiary designation at any time.

**Revocable:** You remain in control of your assets during your lifetime.

**Tax deductible:** You avoid or reduce estate and income taxes.

Beneficiary designation forms override wills and living trusts, so be sure to name contingent or secondary beneficiaries as well.

“How the College just gets better and better, and I wanted to be part of that. My wealth is principally my retirement assets, so that’s where I thought it would make sense to designate the College as a beneficiary.”

—Barbra Goering, AB’74, JD’77

**LEARN MORE**

Visit giftplanning.uchicago.edu/beneficiary.