A PLAN THAT COUNTS
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 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.

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.

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.

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.
“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

**I would like to make a gift**

<table>
<thead>
<tr>
<th></th>
<th>Bequest</th>
<th>Charitable Gift Annuity</th>
<th>Charitable Remainder Trust</th>
<th>Beneficiary Designation</th>
<th>Retained Life Estate</th>
</tr>
</thead>
<tbody>
<tr>
<td>During my life</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Upon my death</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**I have the following assets available to make a gift**

<table>
<thead>
<tr>
<th></th>
<th>Cash</th>
<th>Securities</th>
<th>Real estate</th>
<th>Retirement plan</th>
<th>Life insurance policy</th>
<th>Financial account</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

**Benefits that are important to me are**

<table>
<thead>
<tr>
<th></th>
<th>Income</th>
<th>Income tax deduction</th>
<th>Estate tax savings</th>
<th>Capital gains tax savings</th>
<th>Avoid probate</th>
<th>Lifetime control of assets</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

**If my gift provides income, I prefer that it is**

<table>
<thead>
<tr>
<th></th>
<th>Fixed</th>
<th>Variable</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
For more information about planned gifts, contact:

The Office of Gift Planning  
5235 South Harper Court  
Chicago, IL 60615  
giftplanning.uchicago.edu  
giftplan@uchicago.edu  
866.241.9802

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.