

Your Gift Planning Office

...your partner in smart charitable planning.

Gift Planning
at Washington State University

OUR MISSION: MEETING YOUR GOALS

The Washington State University Foundation Gift Planning team assists WSU alumni and friends in creating gift plans to facilitate your personal and philanthropic goals.

OUR PROGRAM

We can help you maximize your support for WSU's work and priorities through a planned gift in ways that may enable you to receive significant tax and financial benefits.

The Gift Planning team confidentially assists you and your advisors in determining gift plans that best suit your charitable interests, family needs, particular assets, and financial situation. We help with stock transfers, IRA Qualified Charitable Distributions, provide sample Will, beneficiary, or trust language, and draft gift use agreements and charitable gift annuity agreements. Our office may bear the cost of drafting trusts where the WSU Foundation is to be the trustee.

MANY GIVING OPTIONS

GIFTS OF STOCK—Giving stock is one of the many ways you can combine your personal and philanthropic goals. Gifts of long-term appreciated stock offer you tax savings twice. You may avoid paying capital gains tax on the increase in value of your stock, plus receive a tax deduction as of the date of your gift. Stocks that have decreased below their cost basis can be sold and a charitable gift made from the cash proceeds, allowing a double tax advantage—one for the capital loss and one for the charitable gift.

INCOME-PRODUCING GIFT PLANS—You will be satisfied in knowing that you have made a sound financial plan for yourself and your family while helping WSU create a future full of promise, innovation, and excellence. Each of these gift plans provides important tax benefits.

- **CHARITABLE GIFT ANNUITY**—Make a gift of cash or securities and receive reliable income for life. One-life rates range from 4.7 percent to 8.6 percent for individuals ages 70 through 90. Two-life rates are slightly lower.
- **CHARITABLE REMAINDER TRUST**—Irrevocably transfer assets, e.g. cash, securities, or real estate, into a trust for yourself or for others. Receive income from the trust for life, up to a 20 year period, or a combination of the two.
- **CHARITABLE LEAD TRUST**—Provide WSU with annual income from a donated asset for a set term of years. At the end of the term, the principal passes to yourself or others of your choice.

DONOR ADVISED FUND—Ideal for the donor with multiple charitable interests or who wish to make a significant charitable gift in a particular tax year. This gift allows you to establish a fund from which future grants can be made to support WSU and name the WSU Foundation as the final beneficiary.

RETAINED LIFE ESTATE—An especially effective gift if you are age 75 or older and want to simplify administration of your estate and take a current charitable income tax deduction. You can donate your residence, farm, or vacation home to the Washington State University Foundation while retaining lifetime use and income of your property.

GIFTS FOR THE FUTURE THROUGH YOUR WILL—Estate gifts are among WSU's largest sources of private support. In fact, more than one-third of WSU's endowment, valued at approximately \$500 million as of June 30, 2020, has come from estate gifts. After providing for family and other loved ones, you may include a gift to the WSU Foundation in your estate plan to continue your annual gift in perpetuity or to make a special gift not possible during your lifetime. This can be accomplished through a gift in a Will or Living Trust or as a beneficiary designation on life insurance, IRAs, qualified retirement plans, etc. Sample language for bequests and beneficiary designations can be found on our website at foundation.wsu.edu/giftplanning.

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WASHINGTON STATE
UNIVERSITY
FOUNDATION

SCOPE OF THE WSU FOUNDATION GIFT PLANNING PROGRAM

The breadth and depth of the gift planning program at the WSU Foundation encompasses several types of planning giving vehicles over the last 38 years. The Foundation works with donors in establishing Charitable Gift Annuities, Charitable Remainder Trusts, Retained Life Estates, Charitable Lead Trusts, Real Estate, and other complex gift arrangements. The WSU Foundation acts as trustee to 46 Charitable Trusts and 89 Charitable Gift Annuities. The Foundation has partnered with TIAA Kaspick to oversee the trust administration and asset management of \$20.2 million in Charitable Trusts and \$7.6 million in Charitable Gift Annuities. There are currently 1,800 living Legacy Associates who have committed to include the University in their estate plans or completed a planned gift.

Let's Chat!

YOUR WSU FOUNDATION GIFT PLANNING TEAM

With more than 70 years of combined experience in gift planning, our team is here to help, every step of the way.



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