

CREATING YOUR LEGACY

— AT COLORADO STATE UNIVERSITY —



COLORADO STATE UNIVERSITY



IT BEGINS WITH YOU.

When you create a planned gift to benefit Colorado State University, you are investing in the future. You are making it possible for outstanding faculty to innovate and for students to learn from the best educators in their fields. You are providing the dynamic environment for discovery and scholarship that will change our world.

Colorado State University can help you leave a legacy that impacts the lives of students for generations.

PLANNING FOR YOUR FUTURE

As you plan for your future, and that of your loved ones, a deferred gift can continue to benefit others in ways that are important to you and your family. **While charitable gifts are motivated foremost by the desire to support Colorado State University, tax benefits can also be important, allowing you to experience personal satisfaction beyond the fulfillment of shaping the future of Colorado State.**

Deferred giving enables you to arrange charitable contributions in a manner that maximizes your personal and financial goals. A variety of planned gift vehicles – such as a bequest, retirement plan or IRA beneficiary designation, charitable gift annuity, or charitable remainder trust – may be used to construct a charitable gift that, in many cases, produces a greater impact than you ever dreamed possible. Planned gift arrangements can provide peace of mind for you, and for your loved ones after you are gone, by simplifying the estate process and reducing overall taxes on your estate.

STEPS TO LEAVING YOUR LEGACY

- 1** Describe your gift to CSU.
- 2** Provide a “best-guess” estimate of the gift’s value in today’s dollars.
- 3** Designate how you would like your gift used.
- 4** Sign and detach completed form and return to the CSU Office of Gift Planning.
- 5** Keep copies for yourself, your family, and your advisers.

MAKING YOUR PRIORITIES KNOWN TO CSU

Statement of Intent

Once you have decided the planned gift arrangement that is best for you, CSU asks you to provide a Statement of Intent (provided here), which is just as it sounds: a one-page, non-binding disclosure of intent that enables us to understand your charitable wishes and to most faithfully carry them out. Your Statement of Intent allows CSU to recognize your intention to support CSU and to share important giving opportunities and insights with you that could further enhance the benefits of your gift.

In the Statement of Intent, you are asked to provide a description of your future gift to CSU and an estimate of the gift’s value in today’s dollars. Recognizing that estate gifts will fluctuate over time due to many factors, you are simply providing your “best guess” of the amount you anticipate leaving to the CSU Foundation for the benefit of CSU.

The Purpose Section allows you to designate your gift for a specific purpose, such as student, faculty, programmatic, or capital support. CSU can assist you in shaping your future gift to create maximum impact in those areas you care most about. Over the years, we have helped many loyal alumni and friends establish funds to carry out a diverse range of gifting wishes at CSU.

In addition to establishing the purpose and intentions of your future gift, the Statement of Intent can serve as an excellent planning tool for you and your family. If your financial circumstances change in the future, your commitment can be modified or canceled at any time.



THE BEQUEST – Suggested Text for a Will or Trust Provision

The following sample bequest language may be helpful for your attorney in drafting will provisions.

“I give, devise, and bequeath to Colorado State University Foundation (Tax ID#: 23-7098397), a nonprofit corporation existing under the laws of the State of Colorado, and located in Fort Collins, Colorado, _____ (percent of your estate, dollars, property, securities, etc.) to be used for _____ (however you wish for your gift to be used) at Colorado State University.”

If you would like to create a named endowment fund (\$25,000 minimum to establish a permanent endowment) with a portion of the annual income designated for a particular purpose, you can express your wishes this way:

“I give, devise, and bequeath to Colorado State University Foundation, a nonprofit corporation existing under the laws of the State of Colorado, and located in Fort Collins, Colorado (Tax ID#: 23-7098397), _____ (percent of your estate, dollars, property, securities, etc.) to constitute the _____ fund (whatever name you wish to call it, within University naming policies). This fund shall be invested by Colorado State University Foundation, and a portion of the annual income thereof utilized for _____ (whatever you would like the earnings to be used for) at Colorado State University.”

It is also a good idea to include a “saving clause” in your will, in case something happens making it impossible for Colorado State University to carry out your wishes exactly as stated in your bequest. A “saving clause” might read as follows:

“In the event any provision of this bequest shall become void, illegal, impractical, unnecessary, or impossible of performance because of laws or social or economic conditions, which determination shall be made by the CSU Foundation in consultation with the University, to then determine the best use of the bequest in keeping with the original intent of the donor.”

If the bequest is designated for the use of a college or department within a college, add the following phrase: “... in cooperation with the dean of the College of _____.”

The Colorado State University Foundation is a Colorado nonprofit corporation exempt from federal income taxation as a section 501(c)(3) publicly supported charity.

We appreciate the opportunity to review your plans. This review helps to ensure we can accurately fulfill your wishes when your gift is realized. For further information, please call us at (970) 491-4254.

Office of Gift Planning

7115 Campus Delivery

Fort Collins, CO 80523-7115

Phone: (970) 491-4254

Email: giftplanning@colostate.edu

Web: giftplanning.colostate.edu

STATEMENT OF INTENT (for a Future Gift)

As evidence of my/our desire to provide a legacy of support to Colorado State University, I/we hereby inform the Office of Gift Planning that I/we have made a provision in my/our estate plan for a gift to Colorado State University. I/We understand this commitment is revocable and can be modified by me/us at any time.

Name _____ Date of Birth _____

Spouse/Partner _____ Date of Birth _____

Address _____

City _____ State _____ ZIP _____

Preferred Phone Number (_____) _____

Email _____

TYPE: (check all that apply)

Will Living Trust Charitable Remainder Trust

Retirement Plan Assets Life Insurance (owner or beneficiary) Other _____

PURPOSE: The current approximate value of this gift is \$_____

(if gift is a percentage of your estate, please indicate the approximate percentage and present value of that percentage) to be designated as stated below:

\$_____ Gift Designation _____

\$_____ Gift Designation _____

\$_____ Gift Designation _____

I/We understand that by stating an amount above, my/our estate is not legally bound by this statement. At any time, I/we may choose to add, subtract, or revoke this gift at my/our sole discretion. (The Colorado State University Office of Gift Planning requests notification of any and all changes or adjustments to your gift.)

The Frontier Legacy Society recognizes the special group of Colorado State University alumni and friends who have invested in the University's future through a planned gift. Membership in this gift club expresses your belief in CSU and demonstrates your commitment to improving the future through higher education.

ACCEPT membership in the Frontier Legacy Society.

PERMISSION to publish our names in the donor honor roll. I/we wish my/our name(s) to appear as follows: _____

DO NOT PUBLISH my/our names on the donor honor roll.

DECLINE membership in the Frontier Legacy Society.

This gift is ANONYMOUS.

Donor Signature _____ Date _____

Spouse/Partner Signature _____ Date _____

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Colorado State University and Colorado State University Foundation do not provide tax or legal advice. For such advice, contact an attorney or tax professional. All charitable contributions are subject to the gift policies and fees in effect when the gift is realized. If you need assistance with your gift, or to learn more about donor rights and privacy; gift, endowment, and fee policies; and frequently asked questions, please visit: giving.colostate.edu/gift-stewardship.

