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The Office of Planned Giving lives within University Advancement. Planned Giving supports Advancement efforts by helping secure, steward and administer planned gifts for the benefit of the UW's schools, colleges, campuses, and programs.

Planned gifts provide donors with creative and flexible strategies as part of their charitable and estate plans. Some of these gifts provide donors with income and some can help donors reduce their taxes.

## Planned Giving Options

### BEQUEST

Donors can include a gift to the UW in their Will or Living Trust <sup>[1]</sup>. It can be a fixed amount (\$100,000), a percentage (5% of estate), or the residue (all that is left after specific gifts and debts have been paid), or a specific asset.

Suggested bequest language:

?I give to the Board of Regents of the University of Washington, Seattle, Washington, [fixed amount, percentage of estate, the residue, or description of asset] for the [School/College/Program].?

Donors and their advisors are encouraged to work with the Office for Planned Giving to ensure that the language in a Will carries out the donor's intentions.

### BENEFICIARY DESIGNATIONS

Donors can name the UW as the beneficiary of a life insurance policy <sup>[2]</sup> or retirement account <sup>[3]</sup> and direct their future gift to the school, college or program of their choice. <sup>[4]</sup>

### IRREVOCABLE

#### Charitable Gift Annuity <sup>[5]</sup>

In exchange for a gift of cash, stocks or bonds, the UW will pay the donor or his/her loved one a fixed income for life.

## **Charitable Remainder Unitrust** [6]

The donor and the UW enter into a trust agreement. The donor contributes assets to the trust, the UW manages the trust's assets for the donor's benefit, and he/she receives a *fixed percentage* of the value of the trust's assets, valued annually, each year for life or a term of years. When the trust ends, the remaining trust assets benefit the UW.

[6]

## **Charitable Remainder Annuity Trust** [7]

The donor and the UW enter into a trust agreement. The donor contributes assets to the trust, the UW manages the trust's assets for the donor's benefit, and he/she receives a *sum certain* of income each year for life or a term of years. When the trust ends, the remaining trust assets benefit the UW.

[7]

## **Retained Life Estate** [8]

The donor can contribute his/her residence, vacation home or farm *now* while retaining the right to use and occupy the property for life. At his/her death the UW will own the property in its entirety.

[8]

## **Henry Suzzallo Society**

Alumni and friends who have made a planned gift to the UW become members of the Henry Suzzallo Society (HSS), named after the University's 16th president. Membership in the society is the University's way of recognizing and thanking these thoughtful individuals.

The Office for Planned Giving sends new members a welcome letter and HSS certificate signed by the UW President and UW Foundation Chair. Members are invited to the University's annual HSS event and listed in the Report to Contributors, unless they want to remain anonymous.

By request, the Office for Planned Giving can prepare a list of HSS members whose planned gifts will benefit a particular unit. An informational brochure on the HSS is also available.

## **Stewardship**

In addition to their membership in the Henry Suzzallo Society, Planned Giving donors to Arts and Sciences receive an annual "Love-a-Donor" thank you card signed by a student, an annual Dean's letter, and Laureate-level and highly-rated donors, receive UW Common Book as a gift annually with Dean's letter.

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**Contact your department major gift officer [9] to discuss planned gifts**

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**Source URL:** <https://admin.artsci.washington.edu/planned-giving>

**Links:**

- [1] [http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG\\_Gift-in-a-Will-or-Trust.pdf](http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG_Gift-in-a-Will-or-Trust.pdf)
- [2] [http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG\\_Gift-of-Life-Insurance.pdf](http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG_Gift-of-Life-Insurance.pdf)
- [3] [http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG\\_Gift-of-Retirement-Plan-Assets.pdf](http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG_Gift-of-Retirement-Plan-Assets.pdf)
- [4] <http://www.washington.edu/giving/docs/retirement-assets>
- [5] [http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG\\_Charitable-Gift-Annuity.pdf](http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG_Charitable-Gift-Annuity.pdf)
- [6] [http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG\\_Charitable-Remainder-Unitrust.pdf](http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG_Charitable-Remainder-Unitrust.pdf)
- [7] [http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG\\_Charitable-Remainder-Annuity-Trust.pdf](http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG_Charitable-Remainder-Annuity-Trust.pdf)
- [8] [http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG\\_Retained-Life-Estates.pdf](http://depts.washington.edu/uwadv/wp-content/uploads/2012/03/PG_Retained-Life-Estates.pdf)
- [9] <https://admin.artsci.washington.edu/major-gifts>