Gift Planning At Any Age

With gift planning, everyone wins. Play a strategic hand, no matter your age.

20s and 30s
You have just begun your career or started a family. Planned gifts can allow you to designate future support without interfering with current cash flow.

60s and 70s
In planning your retirement you are considering how to provide the income you need each year while reducing taxes. Supporting organizations you value—like Duke—can help you solve this puzzle.

80s and 90s
You are concerned about having a steady stream of income each year regardless of what happens in the market. You can also use an income tax deduction.

Gift Planning
At Any Age

Discover how a planned gift to Duke can leave a lasting legacy for the university you love while also achieving your personal and financial goals. There are multiple options for every life stage.

CHARITABLE REMAINDER UNITRUSTS
Convert appreciated, low-yielding assets like stock or real estate into a diversified portfolio that provides income to you or loved ones while providing future support to Duke.

GIFTS OF REAL ESTATE
Donating property such as a vacation home or investment real estate may allow you to claim a charitable tax deduction and avoid capital gains taxes on any appreciation.

DEFERRED GIFT ANNUITIES
You’re creating a gift that will pay you back when you need it—such as during retirement. You can take a larger income tax deduction now—and increase future payments—by deferring those payments until a later date.

CHARITABLE GIFT ANNUITIES
By donating cash or stock, you can receive a fixed payment from Duke for the rest of your lifetime. After you’ve passed away, the remainder of your gift will be used to support purposes you care about at Duke.

GIFTS OF SECURITIES
Donating appreciated stocks, bonds, or mutual funds that you’ve held for more than one year can provide special tax advantages and have an immediate impact at Duke.

In planning your retirement you are considering how to provide the income you need each year while reducing taxes. Supporting organizations you value—like Duke—can help you solve this puzzle.

You are concerned about having a steady stream of income each year regardless of what happens in the market. You can also use an income tax deduction.

Gift Planning
At Any Age

Discover how a planned gift to Duke can leave a lasting legacy for the university you love while also achieving your personal and financial goals. There are multiple options for every life stage.

CHARITABLE REMAINDER UNITRUSTS
Convert appreciated, low-yielding assets like stock or real estate into a diversified portfolio that provides income to you or loved ones while providing future support to Duke.

GIFTS OF REAL ESTATE
Donating property such as a vacation home or investment real estate may allow you to claim a charitable tax deduction and avoid capital gains taxes on any appreciation.

DEFERRED GIFT ANNUITIES
You’re creating a gift that will pay you back when you need it—such as during retirement. You can take a larger income tax deduction now—and increase future payments—by deferring those payments until a later date.

CHARITABLE GIFT ANNUITIES
By donating cash or stock, you can receive a fixed payment from Duke for the rest of your lifetime. After you’ve passed away, the remainder of your gift will be used to support purposes you care about at Duke.

GIFTS OF SECURITIES
Donating appreciated stocks, bonds, or mutual funds that you’ve held for more than one year can provide special tax advantages and have an immediate impact at Duke.
Contact the Duke University Office of Gift Planning to learn more.

**Phone**
(919) 681-0464

**Email**
giftplanning@duke.edu

**Website**
giving.duke.edu/giftplanning

**Blog**
giving.duke.edu/blog

**Gift Planning At Any Age**