

Why should I consider making a planned gift?

Planned gifts have been directly responsible for some of Duke's most significant advances and are essential for our continued success. And often, they can provide a level of flexibility that makes them the perfect complement to outright giving. They allow you to be resourceful in making a bigger gift than you thought possible while being tax-wise and planning for your future.

Your support empowers Duke to continue to take advantage of opportunities that make us an exceptional institution.

Do More Than You Thought Possible

Current gifts are vitally important and allow Duke to continue on its upward trajectory. Planned gifts are also critical to powering our rise over the long term. Investing in Duke's future can yield invaluable returns to students, faculty, and the Duke community for generations. With help from our expert team, along with your personal tax and legal advisors, your gift can also be part of your own charitable planning for the future.

Over 3,000 alumni, parents, and friends have already discovered the pride and creativity that comes with supporting their Duke passion through a planned gift.

Connect with us today to explore how giving to Duke can also help you realize your personal and financial goals. Call (919) 681-0464 or visit giving.duke.edu/giftplanning to get started.



Our team of charitable planning experts can help you explore creative ways to amplify your impact at Duke, while staying comfortable with your level of giving. Let us help you bring your love for Duke to life.

Giving to
Duke
GIFT PLANNING

Unleash Your Inner Philanthropist



Through imagination and smart charitable planning, you can shape Duke's future beyond what you thought possible and propel Duke further forward.

Making a gift by including Duke in your long-term financial or estate plan is an important decision. It's a decision that encompasses more than financial goals and tax benefits. It's about harnessing your passion to make a lasting impact on the people and places important to you.

Planned gifts are as unique as the people whose passion and creativity inspire them to give. Whether you want to endow a scholarship for future students or give a boost to a particular program, planned gifts provide meaningful support to Duke while helping you achieve your own personal and financial goals.

You may be surprised how big of an impact you can have. Duke offers a range of imaginative giving strategies that allow you to unleash your inner philanthropist while maximizing tax advantages and financial flexibility. Our professional team of gift planning experts can help you find the best option to bring your love for Duke to life.

ADVANCE THE NEXT GENERATION

From medical device developers to computer software designers, engineering experts are in demand. And **Steve B.S.E.'83 and Carol Rosner** will propel the next generation of Duke engineers forward by enriching the educational experience at the Pratt School of Engineering. The couple has included the school in their estate plans and created a charitable remainder unitrust that will support Pratt's advancement while providing them with an income after retirement.

"Duke had an immeasurable impact on my life. The value of my degree has only appreciated since graduation, and I made lifelong friends at Duke. The Office of Gift Planning helped us find a giving opportunity that showed our support and met our personal goals."

Steve Rosner



Bequests and Retirement Plans

Many alumni and friends choose to name Duke as a beneficiary of a will or living/revocable trust. This is one of the most common and simple ways to leave a legacy gift. You can also name Duke as a beneficiary of a retirement plan—IRA, 401(k), 403(b), ESOP, etc.—which may enable you to make a larger gift than you anticipated because income and estate taxes are not imposed when retirement plan assets are left to a charity. Plus, gifts through a retirement plan are easy to complete—typically with a simple form or online.

If you do include Duke in your plans, don't forget to let us know! Understanding your goals in advance helps us ensure that funds are used at Duke in accordance with your wishes.

BENEFITS

- > Maintain access to your assets in case you need them.
- > Contribute any amount or percentage.
- > Gain potential tax advantages.

Life Income Gifts

A life income gift provides a future source of funding for Duke while also providing a tax deduction and payments to you and/or your loved ones. Giving options are flexible with payments to you that can be fixed, variable, or deferred.

BENEFITS

- > Receive an income for you and your family.
- > Establish a gift with as little as \$10,000.
- > Enjoy charitable deductions and other tax-saving opportunities.
- > Assets can be managed by Duke, you, or your trusted advisor.

Charitable Lead Trusts

You can use a charitable lead trust to transfer assets to loved ones and reduce gift and estate taxes by a significant amount. The trust allows you to provide immediate support to Duke through a fixed payment for a specified term. At the end of the term, the trust will transfer all remaining assets to designated heirs with reduced or eliminated estate and gift tax.

BENEFITS

- > Provide a reliable source of income to Duke, directed to the area most important to you.
- > Transfer assets to heirs with reduced/eliminated estate and gift tax.

Retained Life Estate

Generate a current income tax deduction by giving a home or farm to Duke, while retaining the right to use the property during your lifetime.

BENEFITS

- > Retain the right to use the property during your lifetime.
- > Receive an income tax deduction and reduce your taxable estate.



ENHANCE RESIDENTIAL LIFE

A 30-year career in student affairs taught **Margaret Ann Fidler '68** that a great student experience requires the support of a strong organization. So Fidler and her husband, Don, gave a gift to future students by naming Duke as an IRA beneficiary and establishing an operational endowment for Student Affairs.



"My primary interest is in enhancing Duke's strong residential life program. Student residences touch all undergraduates, and they provide the perfect setting for integrating academic and non-academic experiences."

Margaret Ann Fidler

EXPAND EDUCATIONAL OPPORTUNITY

Anne Grossnickle '81 says coming to Duke was the best decision she ever made, and it's a decision more talented undergraduates will have the opportunity to make thanks to her planned gift. Grossnickle created a bequest to augment the endowed financial aid scholarship she named after her parents at Trinity College of Arts & Sciences.

"Establishing a memorial scholarship was the best way to honor my parents and give undergraduates the opportunity to get an education at one of the best institutions in the world."

Anne Grossnickle