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.
**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.

**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.

**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.