

# DUKE WOMEN GIVE

Giving to  
Duke  
GIFT PLANNING

Secure your future. Protect your legacy.  
Maximize your impact.

At a time when unpredictability and rapid change are redefining our world, having financial peace of mind is an essential step toward securing your future. Through planned giving, you can advocate for the causes you care about and open doors of opportunity for yourself and others. At Duke, we understand that these decisions take into account a variety of factors, from the particulars of your life stage to identifying the tools and approaches best suited to your values and aspirations.

Duke's Office of Gift Planning can help you explore strategic gift options that support the university while having a lasting impact and achieving peace of mind for yourself and your family. Whether you are just starting to consider how planned giving can work for you, or are already working with a financial advisor or estate attorney, we are here to help.

## Building a Legacy: Wills and Living Trusts

Bequests through a will or revocable "living" trust are the most common types of planned gifts. These gifts can be designated for specific purposes, such as scholarships or unrestricted support for the places and programs at Duke that have personal resonance. Bequest gifts are flexible and allow you to retain control of your assets in case you need them.



### **Claire Paquin '97**

Claire understands that athletics are a vital part of the university culture. As a former varsity lacrosse player, Duke athletics were an integral part of her experience. Claire and her husband, JP, have established a bequest to support Duke student-athletes. Their planned gift to Duke aligns with their interests in giving back and helps ensure the long-term success of the athletics program, the university and its mission.

*"In order to improve and grow the athletic accomplishments and successes at Duke, the university needs to attract the best and brightest student athletes. By providing financial support through a planned gift, we are helping Duke build a successful athletic program for years to come."*

## Now and Later: Life Income Gifts

Life income gifts provide a tax deduction **and** income to you and/or your loved ones. A charitable gift annuity provides a fixed annuity payment each year. You can choose to defer payments until you need them and receive a higher payout once payments begin, in addition to receiving a higher tax deduction when you make the gift. A charitable remainder unitrust provides a variable payment each year, based in part on the performance of the trust's investments.



### Dara DeHaven '73, A.M.'74, J.D.'80

Dara's long history with Duke stems from three Duke degrees, continued active volunteerism, and generous financial support. She has established a charitable remainder unitrust for unrestricted support to Duke Law, in addition to a bequest to support the Katharine T. Bartlett Professorship, Duke Law and Trinity College of Arts & Sciences. Dara's planned gifts to Duke will ensure that the people and places most important to her will benefit from her generosity far into the future.

*"Duke provided a supportive and encouraging community for learning and a foundation for the future, and has helped shape who I am as a person and a professional."*

## Optimizing Your Options: Tax-Savvy Generosity

### Stocks, Bonds and Mutual Funds

Gifts to Duke of appreciated stocks, bonds or mutual funds held for more than one year can provide you with special tax advantages. You can often claim a charitable tax deduction for the full fair market value of the securities donated to Duke, and not pay capital gains taxes on the appreciation.

### Charitable IRA Rollover

Donors age 70 ½ or older can make a direct, tax-free transfer from their IRA to Duke. Often called a "qualified charitable distribution," this transfer can satisfy the donor's required minimum distribution. It can also be used to satisfy most multi-year pledges to the Duke Annual Fund, create or add to an endowment, or support university endeavors you feel most passionately about.

### IRA, 401(k) or Other Tax-Deferred Accounts

These vehicles can provide a way to make tax-free bequests to Duke at their full value. Unlike distributions that are subject to income tax, these options maximize the full value of your gift.



### **Shannon Norris '93, M.D.'97**

As an undergraduate and then a medical student at Duke, Shannon received scholarships that allowed her to graduate debt-free. Now a radiologist in Atlanta, Shannon is ensuring that other students will have that same opportunity through a planned gift. She designated a portion of her retirement account to establish scholarship endowments for students enrolled in Trinity College of Arts & Sciences and the School of Medicine.

*"Duke gave me a leg up in life and now I want to do the same for those coming after me, especially for students who may not otherwise be able to afford it. These students are our future, and I want to be a part of their success."*

## **Power Boost Your Money: Matching Gifts**

Some companies and foundations will match the value of charitable gifts made by employees and their spouses, board members, and retirees. Check with your company or foundation first, then contact us to complete the process.

To learn more about the personal, charitable and tax benefits of giving to Duke, please contact:

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