

# PLANNED GIVING

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## WHAT IS PLANNED GIVING?

Many people like to support the causes that mean the most to them with a gift through their will or trust, or other type of planned arrangement. These gifts, known as planned gifts, are usually, though not always, fulfilled after death. Some planned gifts can even give you an income throughout your lifetime.

Planned gifts provide a unique opportunity for you to create a lasting legacy for the university programs that matter most to you. These gifts also provide a way for you to pass on your values, achieve certain charitable and financial goals, and may yield certain federal tax advantages.

## HOW DO PLANNED GIFTS HELP THE UNIVERSITY OF UTAH?

These gifts help the university fulfill its mission to serve its students, the people of Utah, and the world by disseminating knowledge through teaching, research, and community outreach. Planned gifts help the university fund scholarships, study abroad programs, faculty support, research, athletics, health care programs, hospitals and clinics, cultural and performing arts programs, libraries, museums, the arboretum, public broadcasting, or community outreach programs.



# WHO & WHAT OF GIVING



## WHO CAN GIVE?

Everyone is welcome and invited to give. Often people think, “I don’t have an estate; I can’t make that kind of contribution.” However, people from all walks of life can make a planned gift—not just the wealthy.

## WHAT CAN I GIVE?

When most people think of making a gift, they think of writing a check or using a credit card. Planned gifts are usually made from people’s assets, such as: cash, securities, real estate, business interests, artwork, intellectual property, retirement plan assets, insurance policies, investment accounts, and oil, gas or mineral interests. You can make a gift from just about any type of asset you own.



# HOW TO GIVE

## HOW DO I MAKE A PLANNED GIFT?

There really is no single way to make a planned gift. The approach you choose will depend on many factors, such as your goals and objectives, family situation, and stage in life.

For example, you can:

- Make a single, lump sum or series of gifts during your lifetime.
- Make a gift that provides income for yourself or for a loved one now, then benefits the university in the future.
- Make a gift that takes effect after your death. This can be a specific dollar amount, a percentage, of or remainder from your will, trust or other asset (such as your retirement fund, investment account or insurance policy).

## TYPES OF PLANNED GIFTS INCLUDE:

- Bequest through a will or living trust
- Charitable gift annuity
- Beneficiary designation on retirement plan assets, brokerage accounts, or donor advised funds
- Charitable remainder trust
- Outright gift of or remainder interest in a personal residence or property
- Gift of a life insurance policy

## OFFICIAL PLANNED GIVING LANGUAGE

If you would like to make a planned gift to the university, here is some suggested language you can share with your attorney:

"I, [name], of [city, state, ZIP], give, devise and bequeath to the University of Utah, a body politic and corporate of the State of Utah, [written amount or percentage of the estate or description of property] for its unrestricted use and purpose [or the specific designation]."

The University of Utah is a body politic and corporate of the State of Utah. The university is a tax exempt organization both as a political subdivision of the State of Utah and a 501(c)(3) charitable organization under the Internal Revenue Code. The University of Utah Tax EIN is 87-6000525. The University of Utah does not have a foundation.

## TELL US ABOUT YOUR GIFT

The university appreciates receiving information from you regarding the specific purposes of your planned gift. We want to ensure that your gift can be used as you intend. Even if you wish to keep your planned gift anonymous, we encourage you to let us know of your plans on a confidential basis.

Dr. John R. Park, the first president of the University of Utah, was one of the U's earliest benefactors, and named the institution as the beneficiary of his entire estate. The John R. Park Society pays tribute to Dr. Park for his leadership, foresight, and generosity, and to all those who carry on this tradition of philanthropy at the University of Utah. Through the society, the university extends its warm appreciation to individuals who make known their thoughtful gift intentions through a planned gift.



# ENDOWMENT GIFTS



## ABOUT ENDOWMENTS

An endowment is a gift that is invested to create present and future income for the university. Every year, a portion of the income is used to support the endowment's purpose, while excess income is reinvested to grow the fund and protect it from inflationary pressures.

Endowment gifts provide the university with ongoing support for scholarships, faculty support, chairs and professorships, lectures, research, academic programs, health care programs, community outreach, the arts, museums, libraries, the arboretum, public broadcasting, athletics, and a variety of other programs and purposes.

## HOW TO CREATE AN ENDOWMENT

Endowments may be created with an outright gift, a pledge over a few years, or with a gift from your will, trust, or other type of charitable bequest. If you create an endowment during your lifetime, you may continue to make contributions over time and even make a final gift from your estate.

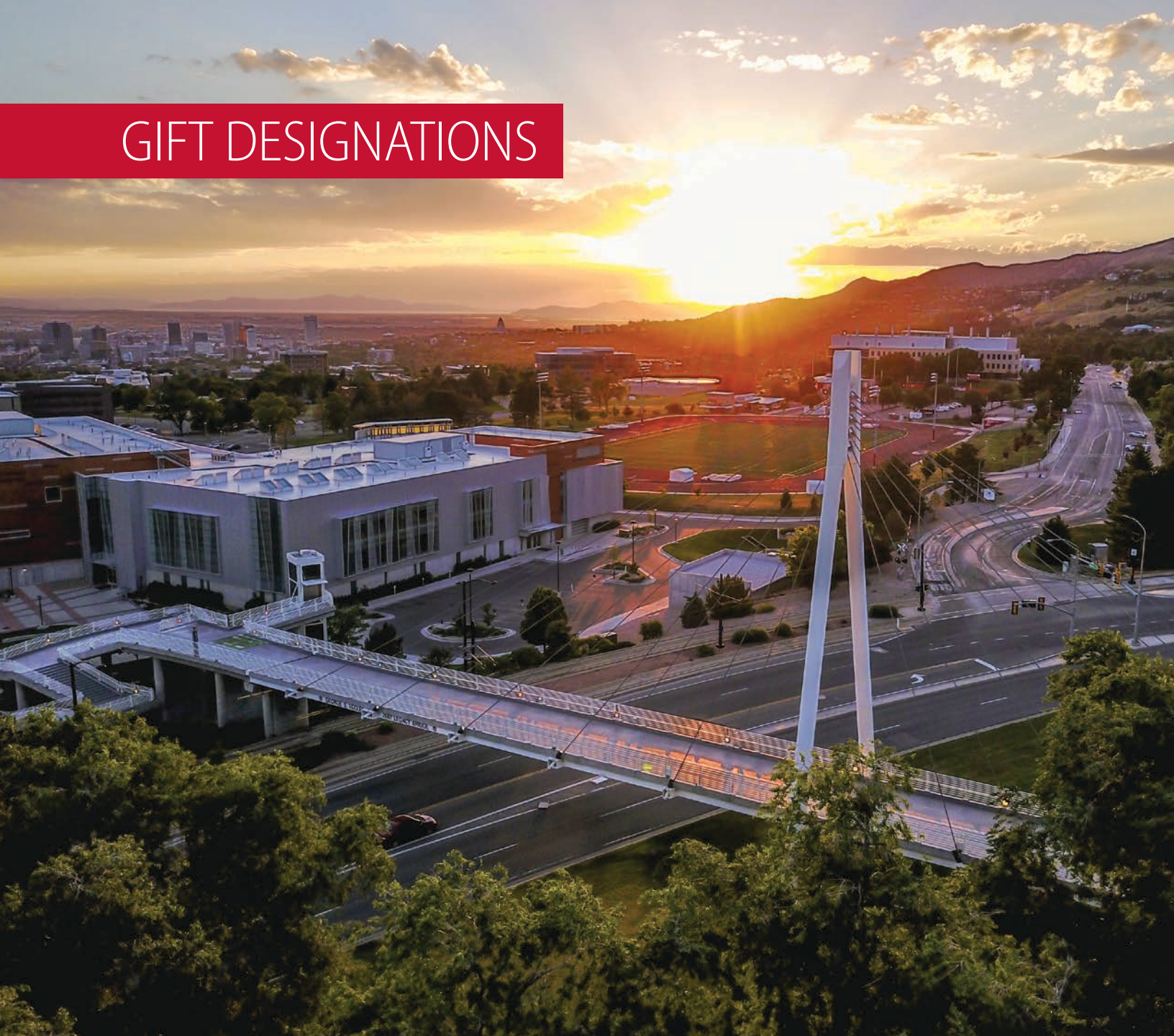
Because endowments are perpetual, a written gift agreement or provision in your will or trust is required so that the university can administer the endowment according to your wishes far into the future.

The University of Utah has established minimum gift amounts for endowments. Contact the Development Office for information about minimum gift thresholds.





# GIFT DESIGNATIONS



## UNIVERSITY OF UTAH CHARITABLE GIFT DESIGNATIONS

Some donors may wish to make a gift without designating a specific campus area, however, most donors prefer to restrict the use of their gift to a campus area for which they have a particular affinity. Gifts may be for general use, scholarships, research, new or existing endowed funds, faculty support, etc. Please contact the Development Office at 801-585-0743 with any questions.

### COLLEGES & SCHOOLS

Architecture + Planning  
Cultural & Social Transformation  
Dentistry  
David Eccles School of Business  
Education  
Engineering  
Fine Arts  
Graduate School  
Health  
Honors College  
Humanities  
Medicine  
Mines & Earth Sciences

Nursing  
Pharmacy  
S.J. Quinney College of Law  
Science  
Social & Behavioral Science  
Social Work

### CULTURE & COMMUNITY

Athletics  
Alumni Association  
Lowell Bennion Community  
Service Center  
Continuing Education &  
Community Engagement

Kingsbury Hall  
KUED Channel 7  
KUER FM 90  
Natural History Museum of Utah  
Pioneer Theatre Company  
Red Butte Garden & Arboretum  
Utah Museum of Fine Arts  
University Neighborhood Partners

### LIBRARIES

Spencer S. Eccles Health Sciences  
Library  
James E. Faust Law Library  
J. Willard Marriott Library

In addition to the designations listed here,\* the university has a number of institutes, centers, and interdisciplinary programs that may be of interest. For a complete list, visit [centers.utah.edu](http://centers.utah.edu).

\*As of September 2017.

## COLLEGES, SCHOOLS, & ACADEMIC DEPARTMENTS



### ARCHITECTURE + PLANNING

School of Architecture  
City and Metropolitan Planning

### CULTURAL & SOCIAL TRANSFORMATION

Ethnic Studies  
Gender Studies

### DAVID ECCLES SCHOOL OF BUSINESS

School of Accounting  
Entrepreneurship & Strategy  
Finance  
Management  
Marketing  
Operations and Information Systems

### EDUCATION

Education, Culture and Society  
Educational Leadership & Policy

Educational Psychology  
Special Education  
Urban Institute for Teacher Education

### ENGINEERING

Bioengineering  
Chemical Engineering  
Civil & Environmental Engineering  
School of Computing  
Electrical & Computer Engineering  
Materials Science & Engineering  
Mechanical Engineering

### FINE ARTS

Art & Art History  
School of Dance  
Film & Media Arts  
School of Music  
Theatre

### GRADUATE SCHOOL

### HONORS COLLEGE

### HUMANITIES

Communication  
English  
History

Linguistics  
Philosophy  
World Languages & Cultures  
Writing and Rhetoric Studies

### MINES & EARTH SCIENCES

Atmospheric Sciences  
Geology and Geophysics  
Metallurgical Engineering  
Mining Engineering

### S.J. QUINNEY COLLEGE OF LAW

### SCIENCE

Biology  
Chemistry  
Mathematics  
Physics & Astronomy

### SOCIAL & BEHAVIORAL SCIENCE

Anthropology  
Economics  
Family & Consumer Studies  
Geography  
Political Science  
Psychology  
Sociology

### SOCIAL WORK

## UNIVERSITY OF UTAH HEALTH



### DENTISTRY

### HEALTH

Communication Sciences & Disorders  
Health, Kinesiology & Recreation  
Nutrition & Integrative Physiology  
Occupational & Recreational Therapies  
Physical Therapy & Athletic Training

### MEDICINE

Anesthesiology  
Biochemistry  
Biomedical Informatics  
Dermatology  
Family & Preventive Medicine  
Human Genetics  
Internal Medicine  
Neurobiology & Anatomy  
Neurology  
Neurosurgery

Obstetrics & Gynecology  
Oncological Sciences  
Ophthalmology & Visual Sciences  
Orthopaedics  
Pathology  
Pediatrics  
Physical Medicine & Rehabilitation  
Physiology  
Population Health Sciences  
Psychiatry  
Radiation Oncology  
Radiology & Imaging Sciences  
Surgery

### NURSING

### PHARMACY

Medicinal Chemistry  
Pharmacology and Toxicology  
Pharmacotherapy  
Pharmaceutics & Pharmaceutical Chemistry

### HOSPITALS, INSTITUTES, & CENTERS

Huntsman Cancer Institute  
John A. Moran Eye Center  
University Neuropsychiatric Institute  
University Orthopaedic Center  
University of Utah Hospital & Clinics



