



OSU FOUNDATION OFFICE OF
GIFT PLANNING



uniting donor and university passions and priorities to achieve excellence

Gift Planning is a means of leaving a legacy at Oklahoma State University. Gifts are typically funded with cash, securities or property, and are a long-term partnership between donors and the OSU Foundation, providing support across campus as well as valuable tax benefits.

“ I feel real concern for the next generations. They may not have the same opportunities as my generation, which means they will have to work twice as hard to make a dent in the competition around them... **Perhaps with the help of my scholarship, someone who could not foresee attaining that goal will actually earn a diploma and know the invigorating power of finishing.**”

Leslie Tieszen

Planned gift to create endowed scholarship

ASSETS *to* CONSIDER

CASH - A gift of cash is a simple and easy way to have an impact on campus. An immediate charitable tax deduction will result.

MINERAL RIGHTS - Transferring your mineral rights to the OSU Foundation will ensure your gift will have a long-lasting impact. With an in-house asset management team, your gift will be maximized to its fullest potential and used in a way most meaningful to you.

REAL ESTATE - A gift of real property (such as your home, vacation property, vacant land, farmland or ranch or commercial property) can make a wonderful gift. If you own appreciated real property, you can avoid paying capital gains tax by making a gift to the OSU Foundation.

STOCKS & BONDS - A gift of securities, including stocks or bonds, is also an easy way to make a gift. By making a gift of appreciated securities, capital gains tax can be avoided that would otherwise be due if you sold these assets.

OPPORTUNITY *for* IMPACT



BARGAIN SALE - The OSU Foundation purchases your property for less than fair market value. You receive the cash and a charitable deduction for the difference between the market value and purchase price.



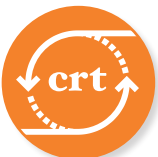
BEQUEST - The Oklahoma State University Foundation is designated the beneficiary of your will, living trust or other estate plan document. Sample bequest language is available.



CHARITABLE GIFT ANNUITY - You transfer your cash or appreciated property to our organization in exchange for our promise to pay you fixed income (*with rates based on your age*) for the rest of your life. Some of your income may be tax free.



CHARITABLE LEAD TRUST (CLT) - Cash or property is transferred to fund a lead trust that makes gifts to us for a number of years. Not only do you receive a charitable deduction for the gift, but your family may also receive the remainder of the trust at substantial tax savings.



CHARITABLE REMAINDER TRUST - Cash or appreciated property is transferred to fund a charitable remainder trust. The trust sells your property tax free and provides you with a flexible or fixed income for life or a term of years.



LIFE ESTATE - Many individuals want to leave their home or farm to the OSU Foundation at their death, but would like to receive a current charitable tax deduction, as well as the right to live in it the rest of their life. A life estate gift can accomplish both goals.



LIFE INSURANCE - A gift of a life insurance policy can be a mutually beneficial gift. If your life insurance policy is no longer needed or will no longer benefit your survivors, consider making a gift and help further our land-grant mission.



RETIREMENT PLANS - A gift of your retirement assets, such as a gift from your IRA, 401k, 403b, pension or other tax deferred plan, is a simple and tax wise way to make a gift.

PROBLEM SOLVING *with*

PLANNED GIVING

There are many ways to achieve your estate goals, and the OSU Foundation is here to help. This chart outlines various benefits to each giving vehicle.

	I'D LIKE TO...								
	GIVE CREATIVELY			RECEIVE TAX HELP			RECEIVE MORE INCOME		
	Give Later	Give More	Give Excess	Reduce Income Tax	Avoid Tax on Capital Gains	Reduce Estate Tax	Fixed Amount	Variable Amount	Part Tax-Free
Will/Bequest	•		•		•	•			
IRA	•	•	•	•		•			
Life Insurance	•	•	•	◦		•			
Charitable Gift Annuity		•	•	•	•	•	•		•
Charitable Remainder Trust		•	•	•	•	•	•	•	◦
Wealth Replacement		•	•	•	•	•			

◦ Possibility; consult your gift planner and tax advisor • Yes

Learn more at OSUgiving.com/EstatePlanning

Connect with us:



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