



FOREVER PRINCETON

MAKING A PLANNED GIFT





When you make a planned gift to Princeton, your generosity has an impact far beyond your lifetime. Your gift supports generations of students whose lives will be forever changed by their Princeton experience.

There are many ways you can make a gift that will cost you nothing today, or help you make a tax-wise investment in both your future and the future of the University. You can support Princeton's mission by:

- naming Princeton as a beneficiary of an IRA, retirement plan, insurance policy, or bank account
- creating a charitable trust or other life income gift
- including Princeton in your will or living trust



PHOTO: KEVIN BIRCH

A PLANNED GIFT TO PRINCETON IS ONE THAT LIVES FOREVER.

From left, Jennifer Scott '07, Kristen Scott '09, John Scott III '75, Maureen Kelly Scott '75, Andrew Scott '14

WAYS TO GIVE

Princeton offers many ways to reach your financial and philanthropic goals, as well as expert advice to help you find the right balance.

Typical financial benefits are listed. Consult with your financial advisor to learn which benefits apply to you.

A Princeton philanthropic advisor can review options and minimum amounts that allow you to designate your gift to support a specific department, program, or initiative.

YOUR GOAL

YOUR STRATEGY

DESCRIPTION

I'm in my 70s; I'd like to ensure that I have enough money for my 80s and 90s, and give a gift to Princeton, too.

Charitable Gift Annuity

Gift, often of cash or securities; provides guaranteed payments to you and/or your beneficiaries age 65 or older for the payees' lifetime; the remainder becomes a gift to Princeton

I have appreciated stock that pays me a dividend; how can I make a gift to Princeton and continue to receive an income during my life?

Charitable Remainder Trust

Gift of cash, securities, or real estate; provides payments to you and/or your beneficiaries for a lifetime or a specific term; becomes a gift to Princeton when the trust ends

I want to make a gift to Princeton, but am also concerned about providing for my heirs and the impact of gift or estate tax.

Charitable Lead Trust

A trust that benefits your heirs and also provides a gift by directing the trust's income to Princeton for a specific term (usually 15 to 25 years)

I'd like to make a gift to Princeton that costs me nothing now.

Bequest
-or-
Beneficiary

Include Princeton in your will -or- Name Princeton as a beneficiary of a life insurance policy, IRA, retirement plan, outside trust, or bank account

YOUR INCOME	YOUR BENEFITS	MINIMUM GIFT
<ul style="list-style-type: none">■ Payments fixed when gift is established■ Remainder is a gift to Princeton	<ul style="list-style-type: none">■ Fast and easy to set up■ Payment amount guaranteed■ Capital gains taxes reduced or deferred■ Charitable deduction on federal income tax■ Reduces your taxable estate in most cases■ Gift (remainder) can be designated■ Expert investment and administration at much lower fees than commercial managers	\$25,000
<ul style="list-style-type: none">■ Unitrust payments vary depending on investment performance■ Annuity trust payments fixed when gift established■ Remainder is a gift to Princeton	<ul style="list-style-type: none">■ Payments may be higher than stock dividends■ Can add to a unitrust at any time■ Capital gains taxes reduced or deferred■ Charitable deduction on federal income tax■ Reduces your taxable estate in most cases■ Gift (remainder) can be designated■ Expert investment and administration at much lower fees than commercial managers	\$100,000
<ul style="list-style-type: none">■ Income payments directed to Princeton■ You control the timing and distribution of assets to your heirs	<ul style="list-style-type: none">■ Charitable deduction on federal income tax■ Federal gift/estate tax deductions on income payments to Princeton may reduce taxable estate■ Charitable lead payments can be designated■ Expert investment and administration at much lower fees than commercial managers	\$250,000
<ul style="list-style-type: none">■ Not applicable	<ul style="list-style-type: none">■ Easy to do and costs nothing now■ Can be a percentage of your estate or a specific amount■ Reduces your taxable estate in most cases■ Gift can be designated	Any Amount



When you include Princeton in your estate plan or create a life income gift, you become a member of the University's 1746 Society, named in honor of the year the University's founding.

Benefits of 1746 Society Membership

- A permanent legacy at Princeton
- Reports on the investment performance of gifts to Princeton and highlights of the gift planning program
- Professional, personalized gift planning services
- Invitations to 1746 Society events
- Recognition in publications, including the 1746 Society roster, *Princeton Alumni Weekly*, and the University's *Gifts to Princeton*
- Option to be an anonymous member if you do not want your membership publicly recognized

SHANI A. MOORE '02

- 1746 Society member
- Her bequest will help students excel beyond her lifetime.
- She's head legal counsel for film at Dolby, where art meets science to create immersive entertainment experiences. She's also an award-winning television writer, and director of the Riordan Initiative, which supports first-generation and low-income college students.

“I want to help exceptional young people and make it easier for them to excel, especially students who have ability but were never told about possibilities.”

—SHANI A. MOORE '02



A PLANNED GIFT TO **PRINCETON**... ...FOREVER IMPROVES LIVES

Shani A. Moore '02 with Richard Riordan '52



ALEXIS AND PIERCE SELWOOD '61

- 1746 Society members
- Their charitable remainder trust provides them with both income and tax benefits now. Princeton and Smith College (Alexis's alma mater) will share the remainder of the trust when it ends.
- Princeton pride is a family tradition that began with Pierce's father, Pierce W. Selwood, a postdoctoral fellow and instructor at the University in the 1930s.

“At some point, you realize you want to give back to the things that matter most to you.... It's a win-win gift.”

— PIERCE SELWOOD '61

...FOREVER SUSTAINS
THE UNIVERSITY

Pierce Selwood '61, holding a photograph of his father, with (from left), daughter, Allison Selwood Catanzaro '90; wife, Alexis Fuerbringer Selwood; and granddaughter, Alice Catanzaro '17

NAOUM FARES MARAYATI '19

- Fares, from Aleppo, Syria, resettled with his family in North Carolina
- Among his activities at Princeton, the psychology major was a residential college advisor at Forbes College, a peer academic advisor, an a cappella group member, and a research assistant at the Princeton Baby Lab.
- Fares was the recipient of several scholarships established by bequests, including those created by Thomas Nichol Jr. '33, Oliver Langenberg '35, and Isabel Dod, in memory of her father, Samuel Bayard Dod, a member of the Class of 1857.



“I escaped the perils of war in Syria with big dreams yet small means of achieving them. Today, I belong to the strong community of Tigers.”

—NAOUM FARES MARAYATI '19

**...FOREVER SUPPORTS
ACHIEVEMENT**

GIVING OPPORTUNITIES

GIFTS THAT COST NOTHING TODAY

- A **bequest** is a gift that comes to Princeton after your lifetime. Through a bequest, you can direct a specific dollar amount or assets to the University. Or, you can direct all or a percentage of the remainder of your estate after your other beneficiaries have received their inheritances and estate-related expenses have been paid.
- No will is necessary to designate the University as a **beneficiary** of your IRA, retirement plan, life insurance, or bank account.
- The following bequest language can be used in your will: *I give and bequeath to the Trustees of Princeton University, a New Jersey not-for-profit corporation, the sum of _____ Dollars {or all the rest, residue, and remainder of my estate} to be used for the purposes of the University at the discretion of its Board of Trustees.*
- The University's tax ID number (EIN) is 21-0634501.

GIFTS THAT PAY YOU AN INCOME

- A **Charitable Remainder Trust (CRT)** or **Charitable Gift Annuity (CGA)** can diversify your portfolio, increase your income, reduce or defer capital gains tax, and provide a federal income tax charitable deduction. Many donors use the payments to fund their annual gift to the University, or to support a University priority during their lifetime.
- A **Deferred Charitable Gift Annuity (DCGA)** is another way to provide yourself and/or your beneficiaries with an income stream. Starting at age 55, DCGAs may be established with rates set for future payments; payments can begin as early as age 65.
- If your 50th — or 55th, 60th, 65th, 70th or more — Reunion is on the horizon, receive Annual Giving major Reunion class credit for life income gifts through Princeton's **Annual Giving Legacy Program**. Gifts made in the form of a charitable remainder unitrust (fluctuating income) or a charitable gift annuity (fixed income) are eligible for AG class credit.

Learn more about life income gifts

<https://alumni.princeton.edu/give/giftplanning/>



Trevor Forde '74, Matthew Kinsey '98, and Roger Moseley '55 converse at a 1746 Society event.



From left, Kelly Lack '10, Jonathan Lack '14, Robert Lack '77 *78, Colleen Kelly '77



I WOULD LIKE MORE INFORMATION ON MAKING A PLANNED GIFT TO PRINCETON.

For more information
return this card, or

Visit alumni.princeton.edu/give/giftplanning
E-mail GiftPlannin@princeton.edu
Call a Princeton philanthropic advisor at 609.258.6318

Yes, I am interested in receiving information on making a bequest or life income gift to Princeton and becoming a member of the 1746 Society.

NAME _____
ADDRESS _____
CITY _____ STATE _____ ZIP _____
PHONE _____
E-MAIL _____



OFFICE OF GIFT PLANNING

Visit alumni.princeton.edu/give/giftplanning

E-mail GiftPlanning@princeton.edu

Call 609.258.6318



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