### Plannned Giving at a Glance

<table>
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<th>TYPE OF GIFT</th>
<th>ADVANTAGES</th>
<th>BENEFICIARY</th>
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<td><strong>GIFTS THAT HELP THE UNIVERSITY IN THE FUTURE</strong></td>
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</table>
| Bequest | • Charitable deduction for taxable estates  
• Allows you to make a large gift at no immediate cost to you | • UW is future beneficiary |
| Life Insurance | • Allows you to make a large gift at little cost to you | • UW is future beneficiary |
| Retirement Plans | • Avoids double taxation of assets  
• UW applies the full amount of plan assets to the purpose you choose | • UW is future beneficiary |
| Retained Life Estate | • Current income tax deduction  
• Estate tax savings  
• Continued use of property for life | • You retain lifetime beneficial use of property  
• UW is future beneficiary |
| **GIFTS THAT PAY YOU INCOME** | | |
| Charitable Gift Annuity | • Current income tax deduction  
• Portion of payments may be tax free  
• Fixed and predictable payments | • One or two annuitant beneficiaries  
• UW is future beneficiary |
| Charitable Remainder Trust | • Current income tax deduction  
• No capital gain recognition on appreciated assets  
• Diversification of investments  
• Payments for life or term of years | • One or more beneficiaries  
• UW is future beneficiary |
| Pooled Income Fund | • Current income tax deduction  
• Income stream  
• Diversification of investments  
• Can be funded with smaller gifts | • One or more beneficiaries  
• UW is future beneficiary |
| **GIFTS THE UNIVERSITY CAN USE TODAY** | | |
| Outright; Tangible Personal Property; or Bargain Sale | • Current income tax deduction  
• See gift in operation during your lifetime | • UW is immediate beneficiary |
| Charitable Lead Trust | • Potential gift tax savings on transfer of assets to individual beneficiaries | • You or your heirs are future beneficiaries  
• UW is immediate beneficiary |

For more information please contact the UW Office for Planned Giving at 206.685.1001, toll free at 800.284.3679, send a message to giftinfo@uw.edu, or visit giving.uw.edu/plannedgiving.
Gifts that Pay You Income

With careful planning you can receive an immediate income tax deduction, provide yourself or someone else with annual income and support the University of Washington in a meaningful way.

Charitable Gift Annuity
In exchange for a gift of cash, stocks or bonds, the UW will pay you or a loved one a fixed income for life.

Charitable Remainder Trust
You and the UW enter into a trust agreement. You contribute assets to the trust, the UW manages the trust's assets for your benefit, and you receive income each year for life or a term of years. When the trust ends, the remaining trust assets benefit the UW.

Pooled Income Fund
Your gift to the UW’s pooled income fund is combined with the contributions of others. You receive annual payments based on the fund’s performance and your share of the pool. At your death the UW withdraws your share of the fund’s assets to support your chosen purpose.

Why a Planned Gift?

Planned gifts provide creative and flexible strategies for your estate and charitable planning. Some planned gifts provide you with income. Many of them can reduce your taxes. The greatest benefit, however, is knowing that your gift to the University can help change lives.

Gifts that help the University in the future

These deferred gifts ensure that future generations will benefit from your generosity and legacy.

Bequests
You can include a gift to the UW in your will or trust.

Retained Life Estate
You can contribute your residence, vacation home or farm now while retaining the right to use and occupy the property for life. At your death the UW will own the property in its entirety.

Beneficiary Designation For Life Insurance Or Retirement Assets
You can name the UW as the beneficiary of a life insurance policy or retirement account and direct your future gift to the school, college or program of your choice.

Gifts the University Can Use Today

There are many gifts in addition to cash that can benefit the UW today. These offer tax benefits, such as an income tax deduction, and the opportunity to support current programs, establish or add to an endowment or provide funding for capital improvements.

Outright
You can make an outright gift of real estate, securities and closely held stock, a paid-up life insurance policy or other property of value.

Tangible Personal Property
The UW encourages gifts of personal property, such as artwork, books, manuscripts, coin and stamp collections, boats, and airplanes.

Bargain Sale
If you sell an asset such as real estate to the UW for less than its current fair market value, you will make a “bargain sale” gift.

Charitable Lead Trust
A lead trust makes payments to the UW for a designated period of time to support the purpose you choose. When the trust ends, the remaining assets are paid to you or other beneficiaries. A lead trust helps the UW now and can reduce the tax cost of transferring valuable assets to family members.

We've had such great adventures in life, from traveling to spending time with family, including our UW family. And we’ve gotten a lot of joy from supporting areas of the UW that are important to us.

Our charitable gift annuity at the UW gives us a steady stream of income now and will provide scholarships to students down the road.

You put off making a decision like this until there’s a revelation that you have to do something good. This was our time to make a difference.

— Dick, ’51, and Laurie Anderson
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