



ANDERSON[®]

UNIVERSITY

Year-end Gifts = Tax Benefits

For most of us, our financial priorities can be narrowed down to two primary goals: paying less taxes and having income that will last our entire lives. With the right tools you can save on your taxes and help our students and the University while helping yourself.

If you are 70 ½ or older, you can make a gift to Anderson University from your IRA. Your gift may qualify for your required minimum distribution, permitting you to lower your income and taxes for this year while impacting our students and the University.

If you want to make a quick and easy gift that offers an immediate charitable deduction, a gift of cash or stock could be a great option for you. A gift of appreciated stock offers even more tax benefits because you can eliminate the capital gains tax that would be due if you sold the stock.

Another gift option to consider would be a gift annuity. When you fund a gift annuity (with cash or stocks), you receive an immediate charitable income tax deduction and a portion of your payments will be tax free for a period of time.

To learn more about any year-end tax-savings options or to request a 2023 IRA Distribution Form, please contact Johnna Shirley at 864-622-6079 or jshirley@andersonuniversity.edu.

Long live Anderson,

Johnna Shirley

Associate VP for Annual and Planned Giving



Johnna Shirley

Associate VP of Philanthropy and Estate Planning

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