



ANDERSON[®]

UNIVERSITY

Beneficiary Designation Gifts

Donating part or all of your unused retirement assets, such as your IRA, 401(k), 403(b), pension, or other tax-deferred plan, is an excellent way to make a gift to Anderson University.

If you are like most people, you probably will not use all of your retirement assets during your lifetime. You can make a gift of your unused retirement assets to help further our mission.

Benefits of gifts of retirement assets

- Simplify your planning
- Support the causes that you care about
- Continue to use your account as long as you need to
- Heirs can instead receive tax-advantaged assets from the estate
- Receive potential estate tax savings from an estate tax deduction

How to make a gift of retirement assets

To leave your retirement assets to Anderson University, you will need to complete a beneficiary designation form provided by your retirement plan custodian. If you designate Anderson University as beneficiary, we will benefit from the full value of your gift because your retirement assets will not be taxed at your death. Your estate will benefit from an estate tax charitable deduction for the gift.

Future gifts from your retirement assets

Did you know that 40%-60% of your retirement assets may be taxed if you leave them to your heirs at your death? Another option is to leave your heirs assets that receive a step up in basis, such as real estate and stock, and give the retirement assets to Anderson University. As a charity, we are not taxed upon receiving an IRA or other retirement plan assets.

If you would like more information about Beneficiary Designation Gifts or other estate planning/tax wise gift options, please contact me at jshirley@andersonuniversity.edu or call 864-622-6079. You can also find great information on our [Planned Giving website](#).



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ANDERSON UNIVERSITY