

## FIND A PLAN *That's Right for You*

Thank you for considering a gift to help support our students and programs. We know you support Kansas City University because you believe in what we do and you want to help make a difference in the lives of others. But we would also like to make sure you benefit from making a gift to KCU.

How does this happen? You may be surprised to learn that many gift types offer significant financial and tax benefits.

### *You Have Options*

You are probably familiar with outright gifts, such as cash or check, which you make today and we can use it right away. But sometimes an immediate gift isn't the best option, especially if you feel unsure about giving up assets today that you and your loved ones might need in the future.

A planned gift is a perfect solution. There are many types of planned gifts and each offers unique advantages. Some planned gifts are revocable — a gift in your will or living trust, for example— so you can change your mind at any time.

Or, they can be irrevocable—just as outright gifts are—so that you benefit from an immediate income tax deduction.

Irrevocable planned gifts are attractive because they are deferred. You part with an asset today, but the actual giving of the asset to KCU is put off for a while—often until after your lifetime (and that of a surviving beneficiary, if you wish). Until that time, you enjoy the benefits from the gift.

For example, with a charitable remainder trust, you receive lifetime income from the asset after it's placed in a trust and then KCU receives the remainder of the trust after your lifetime. Or, you could deed KCU a remainder interest in your home and still retain the right to live in it for life.

The key feature of planned gifts like these is that they provide important benefits to you as well as KCU.

### *Learn More Ways to Give Smarter*

**We've designed the chart inside to summarize the benefits of several common charitable gifts.**

Just think of what you want to accomplish with your gift and there's probably a way to do it!

Feel free to contact us with any questions you might have. We can examine your particular situation and, together with your attorney and/or financial advisors, help find ways to support our students and improve the well-being of the communities we serve while ensuring your family's financial security.

### *Join with other supporters and become a member of the KCU Heritage Society*

If you would like to leave your legacy and join others who support KCU by including the University in their estate plans, please let us know. If you have already included KCU in your estate plans, we want to appropriately recognize you as a member of the KCU Heritage Society and extend our sincere gratitude.

*For more information, please contact:*

**Office of Philanthropy and Alumni Relations**

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# HERITAGE *Society*

*Your Legacy. Their Future.*





# PLAN AHEAD

*to make a big impact at Kansas City University*



	YOUR GOAL	YOUR GIFT	YOUR BENEFITS	HOW TO MAKE A GIFT
<b>SIMPLE GIFT ANYONE CAN MAKE</b>	<ul style="list-style-type: none"><li>• Defer a gift until after your lifetime.</li></ul>	<ul style="list-style-type: none"><li>• Your will or trust</li><li>• A beneficiary designation</li></ul>	<ul style="list-style-type: none"><li>• Maintain your current lifestyle with making a meaningful gift to support KCU.</li><li>• Enjoy flexibility to change your plans as life changes.</li><li>• Pass your retirement plan assets to KCU tax-free.</li></ul>	<ul style="list-style-type: none"><li>• Work with your attorney to add a few simple sentences to your will or living trust detailing your donation to KCU.</li><li>• Designate KCU as beneficiary to you retirement plan, health savings plan or life insurance policy.</li></ul>
<b>GIFT OF ASSETS</b>	<ul style="list-style-type: none"><li>• Make a gift now or in the future that provides tax benefits.</li><li>• Make a larger gift with little or no effect on cash flow.</li></ul>	<ul style="list-style-type: none"><li>• Stock or other securities</li><li>• Real Estate</li><li>• Personal property</li></ul>	<ul style="list-style-type: none"><li>• Receive immediate income tax benefits.</li><li>• Eliminate capital gains taxes on assets that have increased in value.</li><li>• Transfer the expense of insuring or maintaining assets you no longer need.</li></ul>	<ul style="list-style-type: none"><li>• Give stock or securities that have increased in value directly to KCU.</li><li>• Donate real estate</li><li>• Donate tangible personal property such as art, collectibles or other items of value.</li></ul>
<b>GIFTS THAT PAY YOU INCOME</b>	<ul style="list-style-type: none"><li>• Supplement your retirement income with steady payments.</li><li>• Receive payments that are partially income tax-free.</li></ul>	<ul style="list-style-type: none"><li>• Charitable gift annuity</li></ul>	<ul style="list-style-type: none"><li>• Receive current and future savings on income taxes.</li><li>• Enjoy tax savings on a portion of each payment you receive.</li></ul>	<ul style="list-style-type: none"><li>• Make a donation of cash or securities to benefit KCU through a simple contract and receive fixed payments for life.</li></ul>
<b>GIFTS THAT PAY INCOME AND PROTECT ASSETS</b>	<ul style="list-style-type: none"><li>• Supplement your own retirement income or provide a revenue stream to KCU for a set number of years.</li></ul>	<ul style="list-style-type: none"><li>• Charitable remainder trust</li><li>• Charitable lead trust</li></ul>	<ul style="list-style-type: none"><li>• With a charitable remainder trust, you can make a generous gift to KCU, receive an immediate income tax deduction for the charitable portion of your gift and eliminate capital gains tax when the trust is funded with appreciated assets.</li><li>• With a charitable lead trust, you can support KCU during your lifetime, reduce your taxable estate and often reduce income taxes.</li></ul>	<ul style="list-style-type: none"><li>• You transfer cash, securities or other appreciated property into a charitable remainder trust. The trust pays either a variable or fixed amount each year to you or another beneficiary if you choose for a lifetime or term of years (not to exceed 20).</li><li>• You transfer securities or other appreciating property into a charitable lead trust. The trust pays either a variable or fixed amount each year to KCU for a lifetime or term of years.</li></ul>
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