



Planned Giving Guide

Create a Legacy at Southwestern University



SOUTHWESTERN UNIVERSITY



Thank you for your interest in supporting Southwestern through a planned gift. This guide provides a simple overview of the most common options to help you begin thinking about how your values and goals can shape the future of Southwestern and its students.

WHY PLANNED GIVING?

Planned gifts allow you to make a meaningful contribution—often larger than you thought possible—while also providing financial benefits to you and your loved ones. These gifts help Southwestern continue to offer a transformative liberal arts education for generations to come.

Popular Giving Options

Bequests (Gifts in Your Will or Trust)

The simplest and most popular planned gift.

BENEFITS:

- ✓ Easy to set up or update
- ✓ Flexible—you can change your mind at any time
- ✓ Can be a percentage, specific amount, or remainder of your estate

SAMPLE LANGUAGE:

"I give to Southwestern University, located in Georgetown, Texas, [dollar amount, percentage, or description of property] for its general purposes."

Retirement Plans & Life Insurance

Name Southwestern as a beneficiary of your IRA, 401(k), 403(b), or life insurance policy.

BENEFITS:

- ✓ Avoids income taxes on retirement assets
- ✓ Doesn't require updating your will
- ✓ Simple beneficiary form—no legal fees

Charitable Gift Annuities (CGAs)

Make a gift and receive fixed income for life.

BENEFITS:

- ✓ Guaranteed income for one or two people
- ✓ Partially tax-free income
- ✓ Immediate charitable deduction

Charitable Remainder Trusts (CRTs)

Make a gift that pays income for life or for a set term, with the remainder going to Southwestern.

BENEFITS:

- ✓ Income for you or loved ones
- ✓ Potential to reduce capital gains taxes
- ✓ Supports Southwestern in the long term

Gifts of Real Estate or Appreciated Assets

Donate property, land, or stocks.

BENEFITS:

- ✓ Avoid capital gains taxes
- ✓ Receive an immediate tax deduction
- ✓ Make a substantial gift without affecting cash flow

YOUR LEGACY: THE 1840 SOCIETY

When you include Southwestern in your estate plans, you are welcome to become a member of the **1840 Society**, a community of generous alumni and friends who are shaping Southwestern's future. Members receive recognition (if desired), special event invitations, and the satisfaction of knowing their legacy lives on.



Next Steps

1. Talk with us.

We're happy to answer questions or help explore your options confidentially and with no obligation.

2. Consult your advisors.

Your attorney or financial planner can help you determine what type of gift best fits your goals.

3. Let us know.

If you've already included Southwestern in your plans, we'd love to thank you and recognize your commitment.



We're Here to Help

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