



# 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

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#### *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

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## 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.

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## *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.



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**We're Here to Help**

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*This information is not intended as legal or financial advice. Please consult your advisors for guidance specific to your situation.*