

BASIC OPTIONS

1. Include a Gift in your Will or Trust (see below for sample wording)
 - a. You describe how you want your gift used
 - b. You define the gift as a certain dollar amount or as a percentage of your estate.
Advantage: Gifts in a will or trust may be changed at any time.

2. Make a Gift from your 401(k), IRA or other Retirement Plan
 - a. You name the North Carolina State University Foundation, Inc. as the primary or secondary beneficiary of the plan.
 - b. You designate what percentage of the plan is for the Foundation.
 - c. This estate gift may be created without an attorney.
Advantage: A person receiving this money would ultimately pay income taxes on it, but the North Carolina State University Foundation, Inc. would not.

3. Give a Gift and Receive Income Back
 - a. Receive income payments for life after creating a charitable gift annuity with the North Carolina State University Foundation, Inc.
 - b. Payments may begin immediately or at a future date.
 - c. Income payments are based on the age(s) of the income recipient(s).

ADVANCED OPTIONS (These options require discussion with a legal or tax advisor)

1. Charitable remainder trust (including FLIP trusts for real estate)
2. Charitable lead trust
3. Gift of closely-held stock, partnerships, or business interests

SAMPLE WORDING FOR A WILL OR TRUST

I give to the North Carolina State University Foundation, Inc. (the sum of \$_____ or ____ percent of my estate/trust) for the benefit of the Osher Lifelong Learning Institute. This gift shall be administered according to instructions that may be on record with the North Carolina State University Foundation, Inc. If there are no instructions on file, then the gift shall be used for: _____.

INSTRUCTIONS ON HOW TO USE YOUR GIFT or FOR ADDITIONAL INFORMATION

We encourage prospective donors to contact the Office of Gift Planning to ensure that their gift will be used in accordance with their wishes. Donors should consult with Tricia Inlow-Hatcher (919-515-8971, inlow@ncsu.edu) or Katherine Miller (919-515-6059, katherine_miller@ncsu.edu) to review the specific instructions for use of their gift or for additional information.