

Creating Futures

University of Colorado *Foundation*



CU in the Future

Today CU enjoys the distinction of being a leading research university, not just in the Rocky Mountain west but in the entire nation. Support from our alumni, friends, and donors have helped build CU into the stellar institution we are today. Every year their gifts enable us to meet our most pressing needs.

But sustaining the excellence of a great institution is never done and a sound, stable and secure CU depends upon adequate future funding. That's why we need to plan for the years ahead with gifts that ensure the future viability of the university.

CU Today and CU in the Future

Combined with donations the CU Foundation receives annually, planned gifts play a vital role in maintaining excellence. You can choose to fund current needs and help CU Today or support CU in the Future through a planned gift. Better yet, you can help today and tomorrow by making both a current and a future gift—a blended gift. You'll have the satisfaction of seeing the impact you are making today, as well as the gratification knowing you are helping ensure CU's tomorrow.

You Can Dream Big

Most of us dream of making a lasting impact by supporting a cause that's near and dear to our hearts—whether it's student scholarships, faculty support, or important research—with a large outright gift to the University of Colorado. Though we'd like to, we don't always have the resources to make such a gift during our lifetime. But with a planned gift, you can dream big and have a greater impact on the university. And, it's simple and inspiring for others. Just a small percent of your estate, for example, can leave a meaningful commitment to students and faculty at CU while still providing well for your heirs.

Support CU through Your Will

A bequest is a promise, written into your will or living trust to give a portion of your estate upon your death. You may change your bequest at any point during your life. By making your intent known to the University of Colorado Foundation, we can plan for the future, and recognize you during your lifetime. Your estate may eventually be eligible for an estate-tax deduction.



Your Legacy, Your Choice

It is important for you to specifically name the CU Foundation in your bequest to ensure your gift is used as you wish it to be.

Sample bequest language:

I give, devise, and bequeath, to the University of Colorado Foundation, a Colorado nonprofit corporation, (insert dollar amount, percentage of estate, or exact description of property to be devised) for the benefit of the (specific program, campus, college, or school) at the University of Colorado.

Please consult your attorney for advice tailored to your situation.

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For more information on planned giving:

Contact Gift Planning Group

University of Colorado Foundation
4740 Walnut Street
Boulder, CO 80301
Phone: 303.541.1335
Toll-free: 1.888.287.2829
Fax: 303.541.1397
planned.gifts@cufund.org

www.cufund.org/planned-giving



UNIVERSITY OF COLORADO
FOUNDATION

The CU Foundation is a tax-exempt organization under Internal Revenue Code 501(c)(3), and a public charity under Internal Revenue Code 509(a)(1) and 170(b)(1)(A)(iv). Federal tax identification number #84-6049811.

All gifts should be payable to the University of Colorado Foundation, specifying the appropriate fund.

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Bequest Types

- **Specific Bequest**
You can directly specify a percentage of your estate, or a dollar amount in cash, securities, real property and other assets, as a gift to the CU Foundation.
- **Residuary Bequest**
You can allocate the remainder of your estate to the CU Foundation.
- **Contingent Bequest**
You can make the CU Foundation a secondary beneficiary if a primary beneficiary predeceases you.

List CU as a Beneficiary of Your Retirement Plan

Consider directing a percentage of your retirement funds to CU as a charitable gift rather than giving it to the Internal Revenue Service. These funds can be heavily taxed for your heirs. To accomplish this you should list the University of Colorado Foundation as a beneficiary on the beneficiary designation form provided by your plan administrator. By designating some or all of your retirement funds, you can help educate future generations of young people.

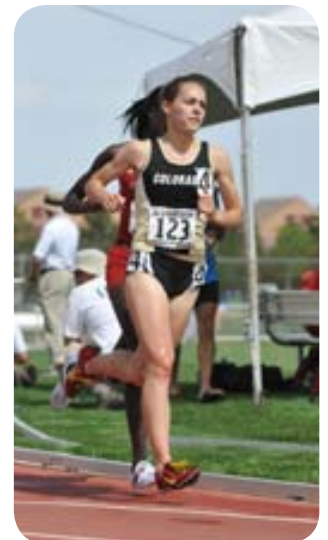
Heritage Society Honors and Connects Donors

As a planned-gift donor, you will be recognized with membership in the Heritage Society. While you may remain anonymous if you prefer, we are pleased to be able to recognize the benefactors who fuel CU's future. Your gift may inspire others to make a bequest or a beneficiary designation.

Passing the Baton with a Planned Gift

Rich Fowler didn't grow up on easy street. His family had limited resources and a college education was only possible because of his determination coupled with a track scholarship and an anonymous grant. Juggling his studies, a job, and running track, it took him six years to graduate with a degree in physical therapy. But it was worth it. "CU opened the door to the world for me," reflected Fowler. "The road to the life I've led would have been longer and harder without the education I received. In fact, I wouldn't have become a physical therapist without scholarship support."

Now Fowler and his wife, Judy, want to "pay it forward" with a planned gift. After providing for their heirs they established a bequest to give scholarships to two financially disadvantaged CU students – a CU-Boulder track athlete and an Anschutz Medical Campus physical therapy student. "I've had quite a good life," Fowler said, "Now I can pass the baton, to use a track term, and help someone else get an education."



You Can Help CU Plan for the Future

Our long-term future is tied to legacy gifts. You can be a part of our future and help educate generations of CU students, and maintain the academic excellence that distinguishes CU in so many ways by creating a planned gift for CU.