

PLANNED GIVING

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WHAT IS PLANNED GIVING?

Many people like to support the causes that mean the most to them with a gift through their will or trust, or other type of planned arrangement. These gifts, known as planned gifts, are usually, though not always, fulfilled after death. Some planned gifts can even give you an income throughout your lifetime.

Planned gifts provide a unique opportunity for you to create a lasting legacy for the university programs that matter most to you. These gifts also provide a way for you to pass on your values, achieve certain charitable and financial goals, and may yield certain federal tax advantages.

HOW DO PLANNED GIFTS HELP THE UNIVERSITY OF UTAH?

These gifts help the university fulfill its mission to serve its students, the people of Utah, and the world by disseminating knowledge through teaching, research, and community outreach. Planned gifts help the university fund scholarships, study abroad programs, faculty support, research, athletics, health care programs, hospitals and clinics, cultural and performing arts programs, libraries, museums, the arboretum, public broadcasting, or community outreach programs.

WHO & WHAT OF GIVING



WHO CAN GIVE?

Everyone is welcome and invited to give. Often people think, “I don’t have an estate; I can’t make that kind of contribution.” However, people from all walks of life can make a planned gift—not just the wealthy.

WHAT CAN I GIVE?

When most people think of making a gift, they think of writing a check or using a credit card. Planned gifts are usually made from people’s assets, such as: cash, securities, real estate, business interests, artwork, intellectual property, retirement plan assets, insurance policies, investment accounts, and oil, gas or mineral interests. You can make a gift from just about any type of asset you own.



HOW TO GIVE

HOW DO I MAKE A PLANNED GIFT?

There really is no single way to make a planned gift. The approach you choose will depend on many factors, such as your goals and objectives, family situation, and stage in life.

For example, you can:

- Make a single, lump sum or series of gifts during your lifetime.
- Make a gift that provides income for yourself or for a loved one now, then benefits the university in the future.
- Make a gift that takes effect after your death. This can be a specific dollar amount, a percentage, of or remainder from your will, trust or other asset (such as your retirement fund, investment account or insurance policy).

TYPES OF PLANNED GIFTS INCLUDE:

- Bequest through a will or living trust
- Charitable gift annuity
- Beneficiary designation on retirement plan assets, brokerage accounts, or donor advised funds
- Charitable remainder trust
- Outright gift of or remainder interest in a personal residence or property
- Gift of a life insurance policy

OFFICIAL PLANNED GIVING LANGUAGE

If you would like to make a planned gift to the university, here is some suggested language you can share with your attorney:

"I, [name], of [city, state, ZIP], give, devise and bequeath to the University of Utah, a body politic and corporate of the State of Utah, [written amount or percentage of the estate or description of property] for its unrestricted use and purpose [or the specific designation]."

The University of Utah is a body politic and corporate of the State of Utah. The university is a tax exempt organization both as a political subdivision of the State of Utah and a 501(c)(3) charitable organization under the Internal Revenue Code. The University of Utah Tax EIN is 87-6000525. The University of Utah does not have a foundation.

TELL US ABOUT YOUR GIFT

The university appreciates receiving information from you regarding the specific purposes of your planned gift. We want to ensure that your gift can be used as you intend. Even if you wish to keep your planned gift anonymous, we encourage you to let us know of your plans on a confidential basis.

Dr. John R. Park, the first president of the University of Utah, was one of the U's earliest benefactors, and named the institution as the beneficiary of his entire estate. The John R. Park Society pays tribute to Dr. Park for his leadership, foresight, and generosity, and to all those who carry on this tradition of philanthropy at the University of Utah. Through the society, the university extends its warm appreciation to individuals who make known their thoughtful gift intentions through a planned gift.

ENDOWMENT GIFTS



ABOUT ENDOWMENTS

An endowment is a gift that is invested to create present and future income for the university. Every year, a portion of the income is used to support the endowment's purpose, while excess income is reinvested to grow the fund and protect it from inflationary pressures.

Endowment gifts provide the university with ongoing support for scholarships, faculty support, chairs and professorships, lectures, research, academic programs, health care programs, community outreach, the arts, museums, libraries, the arboretum, public broadcasting, athletics, and a variety of other programs and purposes.

HOW TO CREATE AN ENDOWMENT

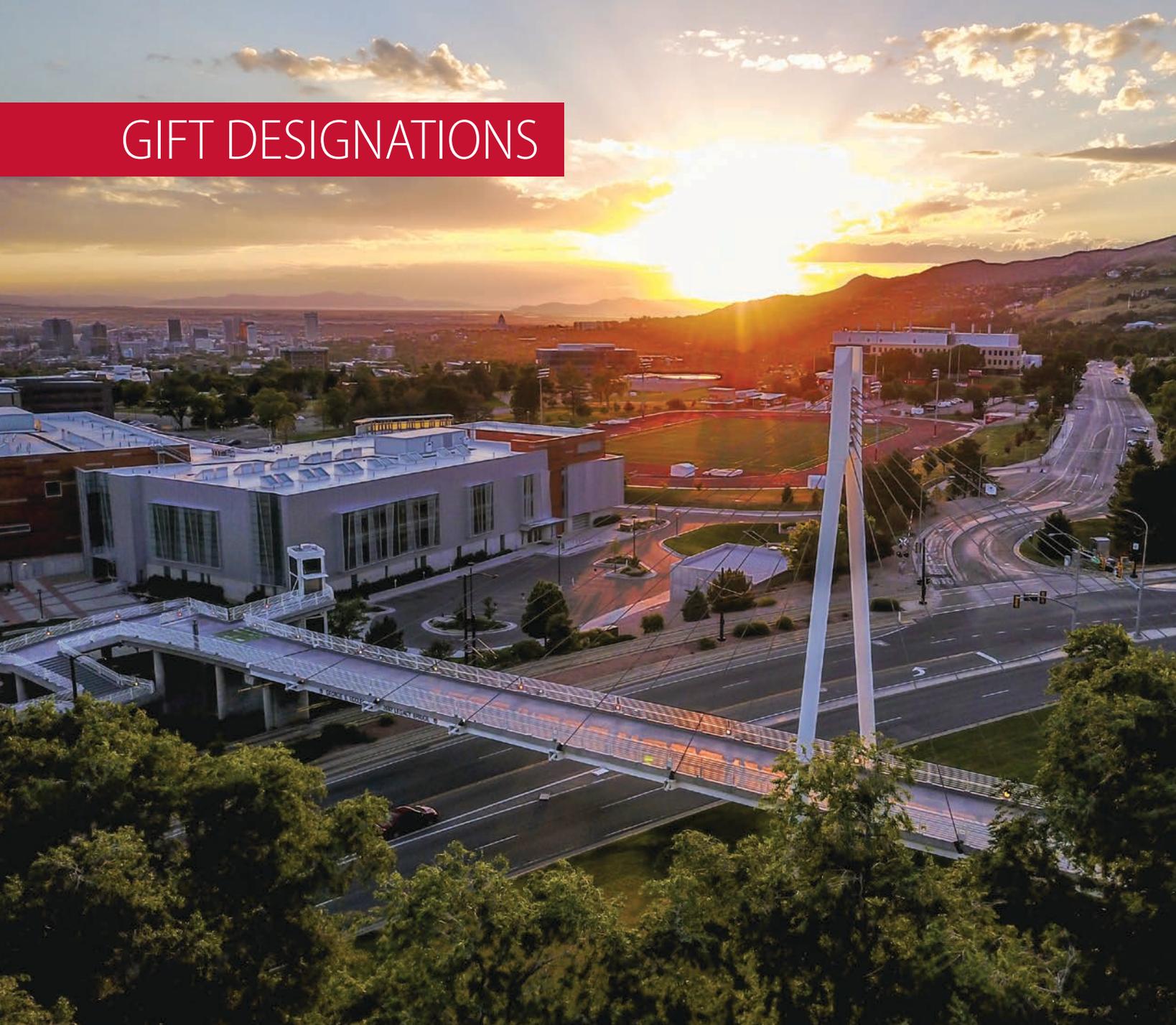
Endowments may be created with an outright gift, a pledge over a few years, or with a gift from your will, trust, or other type of charitable bequest. If you create an endowment during your lifetime, you may continue to make contributions over time and even make a final gift from your estate.

Because endowments are perpetual, a written gift agreement or provision in your will or trust is required so that the university can administer the endowment according to your wishes far into the future.

The University of Utah has established minimum gift amounts for endowments. Contact the Development Office for information about minimum gift thresholds.



GIFT DESIGNATIONS



UNIVERSITY OF UTAH CHARITABLE GIFT DESIGNATIONS

Some donors may wish to make a gift without designating a specific campus area, however, most donors prefer to restrict the use of their gift to a campus area for which they have a particular affinity. Gifts may be for general use, scholarships, research, new or existing endowed funds, faculty support, etc. Please contact the Development Office at 801-585-0743 with any questions.

COLLEGES & SCHOOLS

Architecture + Planning
Cultural & Social Transformation
Dentistry
David Eccles School of Business
Education
Engineering
Fine Arts
Graduate School
Health
Honors College
Humanities
Medicine
Mines & Earth Sciences

Nursing
Pharmacy
S.J. Quinney College of Law
Science
Social & Behavioral Science
Social Work

CULTURE & COMMUNITY

Athletics
Alumni Association
Lowell Bennion Community
Service Center
Continuing Education &
Community Engagement

Kingsbury Hall
KUED Channel 7
KUER FM 90
Natural History Museum of Utah
Pioneer Theatre Company
Red Butte Garden & Arboretum
Utah Museum of Fine Arts
University Neighborhood Partners

LIBRARIES

Spencer S. Eccles Health Sciences
Library
James E. Faust Law Library
J. Willard Marriott Library

In addition to the designations listed here,* the university has a number of institutes, centers, and interdisciplinary programs that may be of interest. For a complete list, visit centers.utah.edu.

*As of September 2017.

COLLEGES, SCHOOLS, & ACADEMIC DEPARTMENTS



ARCHITECTURE + PLANNING

School of Architecture
City and Metropolitan Planning

CULTURAL & SOCIAL TRANSFORMATION

Ethnic Studies
Gender Studies

DAVID ECCLES SCHOOL OF BUSINESS

School of Accounting
Entrepreneurship & Strategy
Finance
Management
Marketing
Operations and Information Systems

EDUCATION

Education, Culture and Society
Educational Leadership & Policy

Educational Psychology
Special Education
Urban Institute for Teacher
Education

ENGINEERING

Bioengineering
Chemical Engineering
Civil & Environmental Engineering
School of Computing
Electrical & Computer Engineering
Materials Science & Engineering
Mechanical Engineering

FINE ARTS

Art & Art History
School of Dance
Film & Media Arts
School of Music
Theatre

GRADUATE SCHOOL

HONORS COLLEGE

HUMANITIES

Communication
English
History

Linguistics
Philosophy
World Languages & Cultures
Writing and Rhetoric Studies

MINES & EARTH SCIENCES

Atmospheric Sciences
Geology and Geophysics
Metallurgical Engineering
Mining Engineering

S.J. QUINNEY COLLEGE OF LAW

SCIENCE

Biology
Chemistry
Mathematics
Physics & Astronomy

SOCIAL & BEHAVIORAL SCIENCE

Anthropology
Economics
Family & Consumer Studies
Geography
Political Science
Psychology
Sociology

SOCIAL WORK

UNIVERSITY OF UTAH HEALTH



DENTISTRY

HEALTH

Communication Sciences &
Disorders
Health, Kinesiology & Recreation
Nutrition & Integrative Physiology
Occupational & Recreational
Therapies
Physical Therapy & Athletic Training

MEDICINE

Anesthesiology
Biochemistry
Biomedical Informatics
Dermatology
Family & Preventive Medicine
Human Genetics
Internal Medicine
Neurobiology & Anatomy
Neurology
Neurosurgery

Obstetrics & Gynecology
Oncological Sciences
Ophthalmology & Visual Sciences
Orthopaedics
Pathology
Pediatrics
Physical Medicine & Rehabilitation
Physiology
Population Health Sciences
Psychiatry
Radiation Oncology
Radiology & Imaging Sciences
Surgery

NURSING

PHARMACY

Medicinal Chemistry
Pharmacology and Toxicology
Pharmacotherapy
Pharmaceutics & Pharmaceutical
Chemistry

HOSPITALS, INSTITUTES, & CENTERS

Huntsman Cancer Institute
John A. Moran Eye Center
University Neuropsychiatric Institute
University Orthopaedic Center
University of Utah Hospital & Clinics

