There are many ways you can make a gift that will cost you nothing today, or help you make a tax-wise investment in both your future and the future of the University. You can support Princeton's mission by:

- naming Princeton as a beneficiary of an IRA, retirement plan, insurance policy, or bank account
- creating a charitable trust or other life income gift
- including Princeton in your will

When you make a planned gift to Princeton, your generosity has an impact far beyond your lifetime. Your gift supports generations of students whose lives will be forever changed by their Princeton experience.
Princeton offers many ways to reach your financial and philanthropic goals, as well as expert advice to help you find the right balance.

### Ways to Give

<table>
<thead>
<tr>
<th>Your Goal</th>
<th>Your Strategy</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’m in my 70s; I’d like to ensure that I have enough money for my 80s and 90s, and give a gift to Princeton, too.</td>
<td>Charitable Gift Annuity</td>
<td>Gift, often of cash or securities; provides guaranteed payments to you and/or your beneficiaries for 70 or older for the payee’s lifetime; the remainder becomes a gift to Princeton.</td>
</tr>
<tr>
<td>I have appreciated stock that pays me a dividend; how can I make a gift to Princeton and continue to receive an income during my life?</td>
<td>Charitable Remainder Trust</td>
<td>Gift of cash, securities, or real estate; provides payments to you and/or your beneficiaries for a lifetime or a specific term; becomes a gift to Princeton when the trust ends.</td>
</tr>
<tr>
<td>I want to make a gift to Princeton, but am also concerned about providing for my heirs.</td>
<td>Charitable Lead Trust</td>
<td>A trust that benefits your heirs and also provides a gift by directing the trust’s income to Princeton for a fixed term (usually 15 to 25 years).</td>
</tr>
<tr>
<td>I’d like to make a gift to Princeton that costs me nothing now.</td>
<td>Bequest or Beneficiary</td>
<td>Include Princeton in your will or name Princeton as a beneficiary of a life insurance policy, IRA, retirement plan, outside trust, or bank account.</td>
</tr>
</tbody>
</table>

### Typical financial benefits are listed. Consult with your financial advisor to learn which benefits apply to you.

<table>
<thead>
<tr>
<th>Your Income</th>
<th>Your Benefits</th>
<th>Minimum Gift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payments fixed when gift is established</td>
<td>Fast and easy to set up</td>
<td>$25,000</td>
</tr>
<tr>
<td>Remainder is a gift to Princeton</td>
<td>Payment amount guaranteed</td>
<td></td>
</tr>
<tr>
<td>Unitrust payments vary depending on investment performance</td>
<td>Federal gift/estate tax deductions on income payments to Princeton may reduce taxable estate</td>
<td></td>
</tr>
<tr>
<td>Annuity trust payments fixed when gift established</td>
<td>Charitable deduction on federal income tax</td>
<td></td>
</tr>
<tr>
<td>Oversight by managers of Princeton’s endowment</td>
<td>Reduces your taxable estate in most cases</td>
<td></td>
</tr>
<tr>
<td>Remainder is a gift to Princeton</td>
<td>Gift (remainder) can be designated</td>
<td></td>
</tr>
<tr>
<td>Income payments directed to Princeton</td>
<td>Payments may be higher than stock dividends</td>
<td>$50,000</td>
</tr>
<tr>
<td>You control the timing and distribution of assets to your heirs</td>
<td>Capital gains taxes reduced or deferred</td>
<td></td>
</tr>
<tr>
<td>Oversight by managers of Princeton’s endowment</td>
<td>Charitable deduction on federal income tax</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reduces your taxable estate in most cases</td>
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<td>Gift (remainder) can be designated</td>
<td></td>
</tr>
</tbody>
</table>

### Minimum Gift

<table>
<thead>
<tr>
<th>Bequest or Beneficiary</th>
<th>Annuity</th>
<th>Lead Trust</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Amount</td>
<td>$25,000</td>
<td>$250,000</td>
</tr>
</tbody>
</table>
When you include Princeton in your estate plan or create a life income gift, you become a member of the University’s 1746 Society. The society is named in honor of the year the University was founded.

Benefits of 1746 Society Membership

- A permanent legacy at Princeton
- Reports on the investment performance of gifts to Princeton and highlights of the gift planning program
- Professional, personalized gift planning services
- Invitations to members-only events
- Recognition in publications, including the Princeton Alumni Weekly and the University’s Gifts to Princeton
- Option to be an anonymous member if you do not want your membership publicly recognized

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A PLANNED GIFT TO PRINCETON...

SHANI MOORE WEATHERBY ’02

- 1746 Society member
- Her bequest will help students excel beyond her lifetime.
- She’s an attorney with NBCUniversal; she also serves as director of the Riordan Initiative, which introduces high-achieving minority and economically challenged high school students to Princeton.

“I want to help exceptional young people and make it easier for them to excel, especially students who have ability but were never told about possibilities.”

—SHANI MOORE WEATHERBY ’02

PHOTO: MAX S. GERBER
ALEXIS AND PIERCE SELWOOD ’61
- 1746 Society members
- Their charitable remainder trust provides them with both income and tax benefits now. Princeton and Smith College (Alexis's alma mater) will share the remainder of the trust when it ends.
- Princeton pride is a family tradition that began with Pierce's father, Pierce W. Selwood, a postdoctoral fellow and instructor at the University in the 1930s.

“At some point, you realize you want to give back to the things that matter most to you.... It's a win-win gift.”
—PIERCE SELWOOD '61

LUIS GONZALEZ-YANTE ’18 AND BO-REYHN CHUNG ’18
- Luis, from Detroit, Michigan, is an aspiring engineer.
- Bo-Reyhn, from Auckland, New Zealand, is considering a major in chemical and biological engineering or neuroscience.
- Both are the first recipients of scholarships created through charitable remainder trusts. Luis benefits from Frank Sagendorph III ’31’s life income gift, while Bo-Reyhn receives financial aid through the generosity of Robert Chamberlin ’57.

“If I could, I’d ask my benefactor which aspects of Princeton he’d never forget, and the reasons he chose to give back. If I had the chance, I would say thank you over and over.”
—BO-REYHN CHUNG ’18
GIVING OPPORTUNITIES

A bequest is a gift that comes to Princeton after your lifetime. Through a bequest, you can direct a specific dollar amount or assets to the University. Or, you can direct all or a percentage of the remainder of your estate after your other beneficiaries have received their inheritances and estate-related expenses have been paid.

No will is necessary to designate the University as a beneficiary of your IRA, retirement plan, life insurance, or bank account.

The following bequest language can be used in your will:

I give and bequeath to the Trustees of Princeton University, a New Jersey not-for-profit corporation, the sum of ________ Dollars {or all the rest, residue, and remainder of my estate} to be used for the purposes of the University at the discretion of its Board of Trustees.

The University’s tax ID number (EIN) is 21-0634501.

A Charitable Remainder Trust (CRT) or Charitable Gift Annuity (CGA) can diversify your portfolio, increase your income, reduce or defer capital gains tax, and provide a federal income tax charitable deduction. Many donors use the payments to fund their annual gift to the University, or to support a University priority during their lifetime.

CRT or CGA

Gift

Donor

Income tax deduction

Payments throughout your lifetime

Remainder to Princeton after your lifetime

Yes, I am interested in receiving information on making a bequest or life income gift to Princeton and becoming a member of the 1746 Society.

Visit giving.princeton.edu/giftplanning

E-mail 1746soc@princeton.edu

Call a Princeton philanthropic advisor at 609.258.6318

For more information return this card, or

NAME
ADDRESS
CITY STATE ZIP
PHONE E-MAIL

GIFTS THAT PAY YOU AN INCOME

Trevor Fords ’74, Matthew Kinsey ’98, and Roger Moseley ’55 converse at the annual 1746 Society luncheon.

From left, Kelly Lack ’10, Jonathan Lack ’14, Robert Lack ’77 ’78, Colleen Kelly ’77.