

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 North Carolina State University Foundation, Inc. for the College of Humanities and Social Sciences.
 - c. This estate gift may be created without an attorney.

Advantages: This estate gift may be created easily and without an attorney. It can also be changed at any time. A person receiving this money outright would ultimately pay income taxes on it, but the North Carolina State University Foundation, Inc. would not.

3. Create a Charitable Gift Annuity
 - a. Receive income payments for life after making a gift to 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).

Advantage: A portion of your gift is eligible for a charitable tax deduction.

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, real estate, partnerships, or business interests

SAMPLE WORDING FOR A WILL OR TRUST

I give to the North Carolina State University Foundation, Inc.* (“Foundation”), a qualified 501(c)(3) charitable organization in Raleigh, North Carolina (the sum of \$_____ or ____ percent of my estate/trust) for the College of Humanities and Social Sciences, to be used in accordance with the terms of the most recent gift agreement and/or instructions, as amended, that I have signed with the Foundation, and if none exists, to be used as directed by the Dean of the College of Humanities and Social Sciences at North Carolina State University.

INSTRUCTIONS ON HOW TO USE YOUR GIFT or FOR ADDITIONAL INFORMATION

Donors should consult with Marcy Engler, Executive Director of Development, College of Humanities and Social Sciences (919.515.5984 or mbengler@ncsu.edu) or the Office of Gift Planning (919.515.5106 or giftplanning@ncsu.edu) to review the specific instructions for use of their gift or for additional information.