



CAL POLY

Office of Gift Planning

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CAL POLY
Office of Gift Planning
UNIVERSITY DEVELOPMENT
& ALUMNI ENGAGEMENT

IT'S YOUR LEGACY. EXPLORE IT.

LEGACY GIFT PLANNING

INCLUDING CAL POLY IN YOUR ESTATE PLANS

You can designate a portion of your estate through a bequest in your will/trust, retirement plan or life insurance policy. There are many ways that proactive planning can be tax-wise and charitable. The following are a few methods to consider.

BEQUEST

Bequests to Cal Poly may be in the form of a fixed dollar amount, a percentage, or remainder of an estate. This can be accomplished in as little as one sentence: I give to California Polytechnic State University Foundation, San Luis Obispo (federal tax ID #20-4927897), the sum of \$_____ (or percentage/remainder) for the benefit of (specific college, department, unit or program).

RETIREMENT PLANS

Many individuals are surprised to learn that if an individual other than your spouse is named as beneficiary of your account it will be subject to both income tax and estate tax. By naming Cal Poly as the beneficiary, the university will receive the full amount tax-free. Contact the administrator of your retirement account for a change-of-beneficiary form.

LIFE INSURANCE

Similar to retirement plans, life insurance policies can be designated to Cal Poly as the beneficiary of your policy. Contact the administrator of your life insurance policy for a change-of-beneficiary form.

If you choose to make a planned gift, be sure to let us know you have included Cal Poly in your future plans — we want to say thank you.

FOR MORE INFORMATION

For more information on how a gift to Cal Poly can help you achieve your financial goals while supporting Learn by Doing education, contact the university's Office of Gift Planning.