

A GIFT OF REMAINDER TRUST PAYS IT FORWARD TO YOU AND CLEMSON

Clemson University is the direct result of the vision and legacy of Anna Calhoun Clemson and Thomas Green Clemson. When he signed his will on Nov. 6, 1886, the Clemsons' long-awaited vision for establishing a "high seminary of learning" was created. It was also a true testament to the power of planned giving. The Clemsons and others like them had a strong desire to utilize their assets in a way that reflected their own personal values. You have that ability as well.

A SMART PLAN AND A GREAT GIFT TO YOU

There's a saying that goes, "If you don't know where you're going, you won't get there." That's especially true when it comes to planning a will or estate plan that satisfies your financial objectives and the plans of those you love. Many people frequently forget the impact capital gains can have upon the sale of an appreciated property or securities – devouring the assets you intended to leave behind for your family.

A GIFT OF CHARITABLE REMAINDER TRUST CAN REDUCE TAX CONCERNS

A charitable remainder trust has many pay offs. First, by giving Clemson assets through an annuity trust, you and/or your loved ones receive a fixed payment or for a specified number of years for life. The payment amount is determined at the time the gift is made. This type of trust is especially attractive to those with highly appreciated assets. Another benefit is that you can decide how your remaining trust assets will ultimately be designated at Clemson, and you may realize an immediate charitable tax deduction.



A CHARITABLE REMAINDER UNITRUST IS A WIN/WIN ALTERNATIVE

A charitable remainder unitrust is also an attractive way to turn an appreciated, low-yielding asset into a more profitable one without paying capital gains. A unitrust also allows you to decide what program or area you want to support at Clemson. You also receive an immediate charitable tax deduction for the value of appreciated property or securities while generating income for a specified number of years or a period based on your life and needs. Another way a unitrust can be used is to allow Clemson to sell your appreciated property tax-free and then begin paying you income. The major difference between an annuity trust and a unitrust is that the unitrust establishes payments on a percentage of the fair market value of the trust assets annually, so unlike a trust that has fixed payments, payments may fluctuate each year.



Stocks or Cash



Unitrust



Donor



Clemson

A DEFERRED BEQUEST HELPS YOU CARE FOR YOUR FAMILY AND CLEMSON

We know it's important to put family first. If family matters prevent you from making an outright bequest because you need to preserve assets to provide income for surviving loved ones, you may consider a time-delayed or deferred bequest. Your estate-tax liability is correspondingly reduced, leaving more assets to generate additional income for your beneficiaries. You can leave your assets to a spouse, child or loved one, and then at the end of their lives, the remainder is given to Clemson. This often takes the form of a charitable remainder trust.

THERE'S NO TIME LIKE THE PRESENT

The Office of Trusts, Estates and Gift Planning is ready now to provide you the information to establish a charitable remainder annuity trust or unitrust. A member of our staff will meet with you and your financial and legal advisers if needed to discuss how to make this important gift. For more information visit clemsongiving.org or call 864-656-0663. Our staff is also available to discuss other ways to give to Clemson that can satisfy your personal financial objectives and support the life-changing educational experience for Clemson students today, tomorrow and forever.

Please call us to request a personalized calculation/illustration of your specific gift.

CLEMSON
UNIVERSITY

This information is not intended to provide legal or accounting advice, or to address specific situations. Please consult with your legal or tax adviser.

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ClemsonForward will position Clemson for the next 50 years and make an impact on real issues facing the people of our state and nation. Clemson Forever supports the goals of ClemsonForward through its unrelenting mission to strengthen the University by building a solid financial base of private giving, providing exemplary stewardship of those gifts and clearly communicating to donors the impact of their gift and the gratitude of the Clemson Family.

864-656-2121
cufund-L@clemson.edu
clemson.edu/giving

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