YOUR OREGON LEGACY

DISCOVER THE POWER OF GIVING THROUGH YOUR ESTATE PLAN
Helping Future Generations

The simple act of making a gift to the UO has more power than you might think. You’ve seen how gifts from previous generations helped make the UO what it is today. A gift through your estate will help transform the lives of future generations of students.

Thank you for considering the UO as part of your Oregon legacy.

Language You Can Use for Your Gift to the University

First, when preparing your will or living trust, it is important that you designate the University of Oregon Foundation as the recipient of your gift. The foundation receives, invests, and distributes funds for the benefit of the university.

If your gift is for a specific purpose, please contact us. We can work with you and your advisors to draft gift language that matches your intent.

If your gift is for general support of the UO, please use the following in your will or trust:

“I hereby give, devise, and bequeath to the University of Oregon Foundation, a corporation existing under the laws of the State of Oregon, Taxpayer Identification Number 93-6015767, [Insert amount or percent of estate] to be used to further the mission of the University of Oregon at the discretion of the president of the university.”

“I was helped, and now it’s my turn. As Ducks, we should share the wealth that our educations have given us.”

Jim Shephard, BA ’80
UO Foundation Trustee
KEY QUESTIONS

What is important to you?
Helping students financially? Attracting excellent faculty members? Advancing research? Supporting a particular program?
We can help you find the area that best matches your interests and goals and outline options for structuring your gift.

How do you want your gift to be used?
Unrestricted gifts allow the UO to direct the funds to the areas of greatest need at the time the gifts arrive. They are especially valuable because they allow maximum flexibility to meet the university’s future priorities.
Restricted gifts support a particular area on campus. Each restricted gift is unique, so please contact the Office of Gift Planning for appropriate language to ensure your gift can be used as you intend.

Will your gift be expendable or endowed?
Expendable gifts are spent in their entirety within a short time.
Endowed funds are structured to last forever and provide ongoing support. They have minimum funding requirements. Please contact us for more information about endowed gift opportunities.

BENEFITS

Keep your lifestyle
A gift through your estate plan costs you nothing now, and will provide critical support for students, faculty members, and programs for generations to come.

Retain control
You stay in charge of your assets during your lifetime.

Tax savings
Charitable gifts from your estate are not subject to taxes, so the university will be able to use the full amount of your gift for the purposes you specify.

“Scholarships help incredibly. I’m glad there are people willing to extend a hand.”
Paula Barreto, Class of 2015
Iraq War veteran, Osher Scholar, Dorothy Martone Memorial Scholar in Landscape Architecture

Visit us at giftplan.uoregon.edu
CHECKLIST

Things to discuss with your attorney and financial advisor

☐ Will versus living trust
  Wills and living trusts both provide instructions for how your estate will be distributed.

  A will is submitted to the probate court, which oversees the administration of estates.

  A living trust is administered through a private process that is not subject to probate. Unlike a will, which does not become effective until death, a living trust controls your assets during and after your lifetime. After signing a living trust, your assets are transferred into the trust. Assets in the trust are not subject to the delay and expense of probate at the time of death.

☐ How to make your gift
  You can make your gift by signing a new will or living trust, adding a codicil to your current will, or by making an amendment to your current trust. Your attorney and financial advisor can help you determine which option is best for you.

☐ Specific amount versus a percentage of your estate
  You can designate a gift of cash, securities, real estate, or other property through your will or living trust.

  Your gift can be for a set amount or for a percentage of your estate. Many donors prefer to use a percentage because the value of their estate will change over time.

☐ Beneficiary designation forms
  You can designate the UO as the beneficiary of your retirement plan, life insurance policy, or other financial account. In some cases, there can be tax advantages to your heirs depending on the type of account you use for your gift.

☐ Life income gifts
  Another part of your estate planning may include creating a gift that will provide you and/or loved ones with income for life and immediate tax benefits.

Please contact us to learn more about including the UO in your estate plan.

UO Office of Gift Planning
541-346-1687
800-289-2354
giftplan@uoregon.edu

“Someday, I hope to be the one giving back to help students.”

Fan Zhang, Class of 2015
Cha Scholar

The UO Office of Gift Planning does not render tax or legal advice to donors. We provide information about the benefits of gift planning vehicles. You should consult your own professional advisors. The UO is an equal-opportunity, affirmative-action institution committed to cultural diversity and compliance with the Americans with Disabilities Act. This publication will be made available in accessible formats upon request. ©2015 University of Oregon MC0315-021vx-K5XXXX.