



## Your gift, *made your way.*

Your generosity supports student success, research excellence, and meaningful service and outreach. Rooted in the mission and values of its land-grant heritage, Colorado State University will take on global challenges, improve access and opportunity, and create brighter futures – because of you.

However you choose to make your gift, we're here to help you meet your philanthropic goals.

### *About the CSU Foundation.*

Since its founding in 1970, the nonprofit Colorado State University Foundation has sought to maximize returns on donor philanthropy that benefit students, teaching, and research at CSU. The Foundation combines, invests, and grows donors' gifts to CSU while stewarding and administering funds to bring donors' philanthropic dreams and passions to life – both now and forever.

### *About CSU STRATA.*

CSU STRATA is a private, not-for-profit corporation, legally separate from the Colorado State University System. Founded in 1941, CSU STRATA supports and serves the campuses and affiliates of the CSU System through strategic real estate management, project development services, special project oversight, intellectual property management, and technology transfer services, as well as operational management of regional, state, national, and international assets.

### Learn More.

For more information on giving options, visit [giving.colostate.edu/ways-to-give](https://giving.colostate.edu/ways-to-give), email [giftplanning@colostate.edu](mailto:giftplanning@colostate.edu), or call (970) 491-4254.



**UNIVERSITY  
ADVANCEMENT**  
COLORADO STATE UNIVERSITY

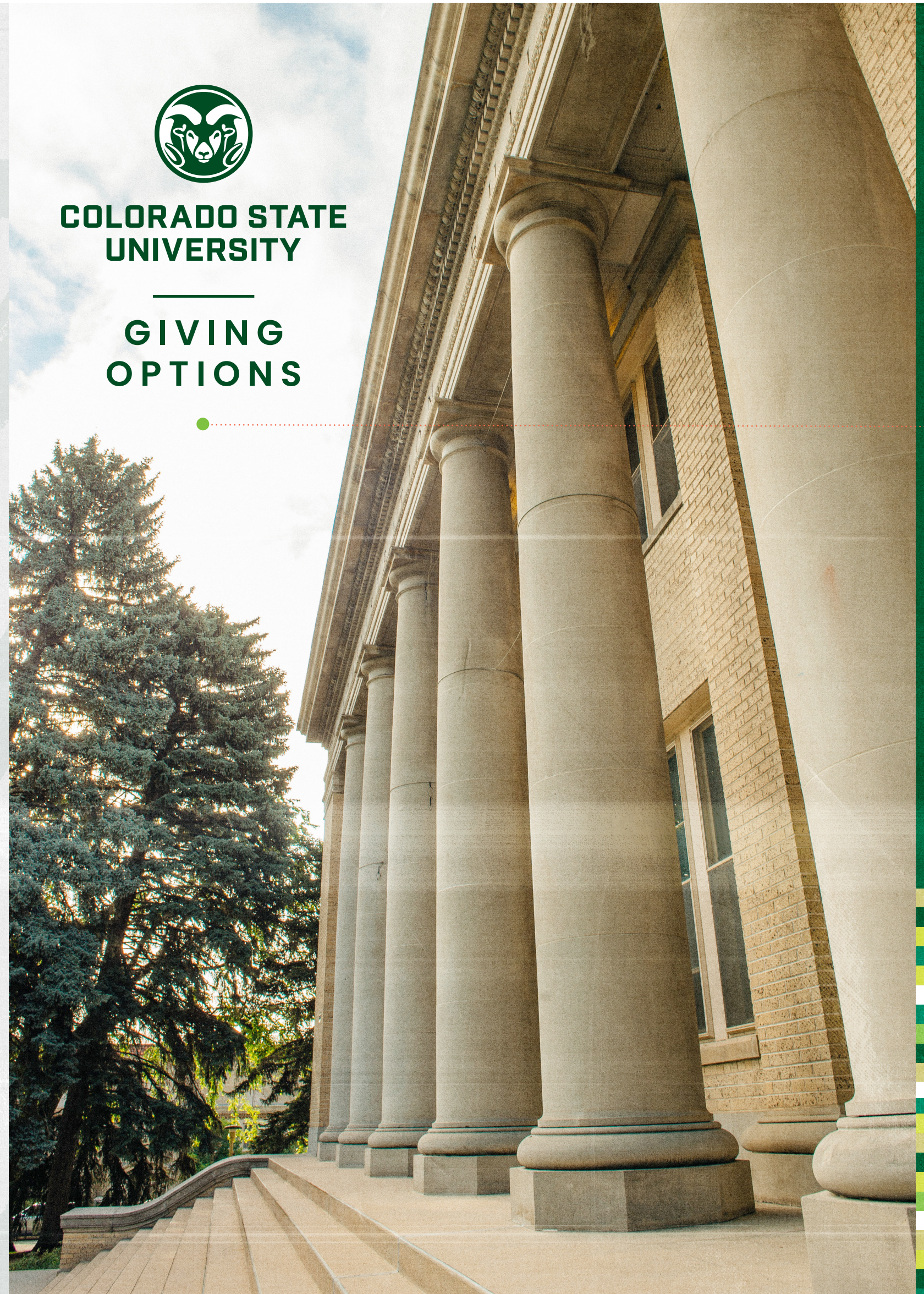
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**COLORADO STATE  
UNIVERSITY**

## GIVING OPTIONS



# Choose the gift that *matches your goals.*

Gifts to benefit Colorado State University are received through Colorado State University Foundation ("the Foundation") and CSU STRATA.

	YOUR GIFT	MINIMUM	FUNDING ASSETS	YOUR GOAL	HOW IT WORKS	YOUR BENEFITS
CURRENT GIFTS	<b>Cash</b>	No minimum	Check, credit card, electronic funds	Make a quick and easy gift.	Write a check, give online, or set up a funds transfer to the Foundation.	<ul style="list-style-type: none"> <li>Income tax deduction (when itemizing)</li> </ul>
	<b>Securities</b>	No minimum	Publicly held stocks, closely held stocks, bonds, mutual funds; have appreciated in value and have been held more than a year	Avoid capital gains tax.	Transfer your appreciated securities to the Foundation.	<ul style="list-style-type: none"> <li>Income tax deduction (when itemizing)</li> <li>Capital gains bypassed</li> </ul>
	<b>Cryptocurrency</b>	No minimum	Virtual currencies	Quickly and easily give virtual assets that are treated like property.	Donate cryptocurrency online through the Foundation's service provider.	<ul style="list-style-type: none"> <li>Capital gains bypassed</li> </ul>
	<b>Real Estate</b>	Determined by gift type	Primary residence, oil and gas interests, investment property, commercial property, land	Generate significant tax benefits.	Donate your property to the Foundation through CSU STRATA.	<ul style="list-style-type: none"> <li>Income tax deduction (when itemizing)</li> <li>Potential capital gains bypassed</li> <li>Burdens of ownership removed</li> </ul>
	<b>IRA Charitable Rollover/Qualified Charitable Distribution</b>	No minimum	Individual Retirement Account for individuals 70 1/2 years of age or older	Make a tax-friendly gift from your IRA.	Request a Qualified Charitable Distribution form from your IRA custodian. Distribute up to \$105,000 per year to the Foundation (indexed annually).	<ul style="list-style-type: none"> <li>Tax advantages</li> <li>Reduce taxable income</li> <li>May satisfy your required minimum distribution if donor is 73 or older</li> </ul>
	<b>Donor Advised Funds</b>	No minimum	Donor advised fund	Easy way to make an impact.	Make a gift from your donor advised fund to the Foundation.	<ul style="list-style-type: none"> <li>Easy way to give</li> </ul>
AFTER LIFETIME	<b>Bequest</b>	No minimum	Cash, securities, real estate, tangible personal property	Control your assets during your lifetime.	Designate the Foundation as a beneficiary in your will or living trust.	<ul style="list-style-type: none"> <li>Estate tax savings may apply</li> <li>Revocable</li> </ul>
	<b>Retirement Account</b>	No minimum	Retirement asset	Avoid taxation on your retirement assets.	Designate the Foundation as beneficiary of your retirement account.	<ul style="list-style-type: none"> <li>Income and possible estate tax advantages</li> <li>Revocable (during lifetime)</li> </ul>
	<b>Life Insurance</b> <i>(Ownership transfer)</i> <b>Life Insurance</b> <i>(Designation)</i>	Contact us	Life insurance policy	Make a gift without using current assets.	<ol style="list-style-type: none"> <li>Irrevocably transfer policy ownership to the Foundation, or</li> <li>Designate the Foundation as a beneficiary of your life insurance policy.</li> </ol>	<ul style="list-style-type: none"> <li>Tax advantages</li> <li>Revocable if CSUF is beneficiary only; irrevocable if policy is a gift</li> </ul>
DUAL-BENEFIT GIFTS	<b>Charitable Gift Annuity</b> <i>(not available in all states)</i>	\$25,000 Minimum age 65	Cash, securities	Receive fixed payments for life; a portion of income may be tax-free.	Give cash or securities to fund a gift annuity and receive fixed payments for life. The Foundation receives the remainder. This giving option is irrevocable.	<ul style="list-style-type: none"> <li>Potential capital gains tax advantages</li> <li>Payments for life</li> <li>Burdens of ownership removed</li> </ul>
	<b>Deferred Charitable Gift Annuity</b>	\$25,000 Minimum age 65 (at time of first payment)	Cash, securities	Receive fixed payments for life, starting at a future date; a portion may be tax-free.	Give cash or securities to fund a gift annuity and receive fixed payments for life. The Foundation receives the remainder. This giving option is irrevocable.	<ul style="list-style-type: none"> <li>Potential capital gains tax advantages</li> <li>Payments for life</li> <li>Burdens of ownership removed</li> </ul>
	<b>Retained Life Estate</b>	Based on appraised amount	Certain types of real estate	Give a gift of real estate but maintain lifetime use.	Give your property to the Foundation through CSU STRATA but retain the right to use the property during your life or the life of a beneficiary.	<ul style="list-style-type: none"> <li>Income and estate tax advantages</li> <li>Lifetime use of property</li> </ul>
Third-Party Administered DUAL-BENEFIT GIFTS	<b>Charitable Remainder Trust</b>	Contact us	Cash, securities, real estate	Turn an appreciated asset into an income stream with tax advantages and potentially delay capital gains tax at time of sale.	Transfer cash or appreciated property to fund a trust that may sell your property and provide you with payments for life or a term of years. The Foundation receives the remainder.	<ul style="list-style-type: none"> <li>Initial income tax deduction (when itemizing)</li> <li>Capital gains tax advantages</li> <li>Payments for life or a term of years</li> <li>Burdens of ownership removed</li> </ul>
	<b>Charitable Lead Trust</b>	Contact us	Cash, securities, real estate	Support Colorado State University for a term of years and transfer remaining assets to beneficiaries.	Transfer cash or property to fund a trust that makes gifts to the Foundation for a term of years. Your named beneficiaries receive the remainder.	<ul style="list-style-type: none"> <li>Income, estate, or gift tax deduction</li> <li>Possible estate and gift tax savings</li> </ul>
	<b>Part Unitrust, Part Sale</b>	Based on appraised amount	Real estate	Liquidate a highly appreciated asset without incurring substantial taxes.	Deed a portion of your real estate into a charitable remainder trust; after the property is sold, you receive your portion of the proceeds and your trust receives its share.	<ul style="list-style-type: none"> <li>Income tax deduction</li> <li>Capital gains tax advantages</li> <li>Burdens of ownership removed</li> </ul>

