



## Benefits of membership in the Heritage Society

- An invitation from the President to an annual donor appreciation event
- Invitations to other exclusive university events throughout the year
- Your name listed in the Donor Honor Roll published online (if desired)
- The gift of a distinctive lapel pin
- The satisfaction of supporting future Aztecs and playing a part in SDSU's development as leading public research university

As a member of the Heritage Society, your gifts can be directed to benefit scholarships; faculty research, academic departments or colleges; specific programs or endowments; or multiple areas within the university.

SDSU's planned giving staff are experts in charitable gift planning and are ready to assist you as you explore how to fulfill your charitable goals and leave a legacy to SDSU.

AGE	RATE
90	9.0%
88	8.4%
86	8.0%
84	7.6%
82	7.2%
80	6.8%
78	6.4%
76	6.0%
73	5.5%
66	4.8%
62	4.5%
58	4.2%
55	4.0%

\*Rates effective January 2012  
unchanged as of April 2014

### Amy Walling

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Notify us of your gift by visiting [sdsugift.org](http://sdsugift.org)  
and complete the Legacy Gift Form.



SAN DIEGO STATE  
UNIVERSITY

*Leadership Starts Here*

*This information is provided as an educational service.  
Professional advisors should always be consulted.*

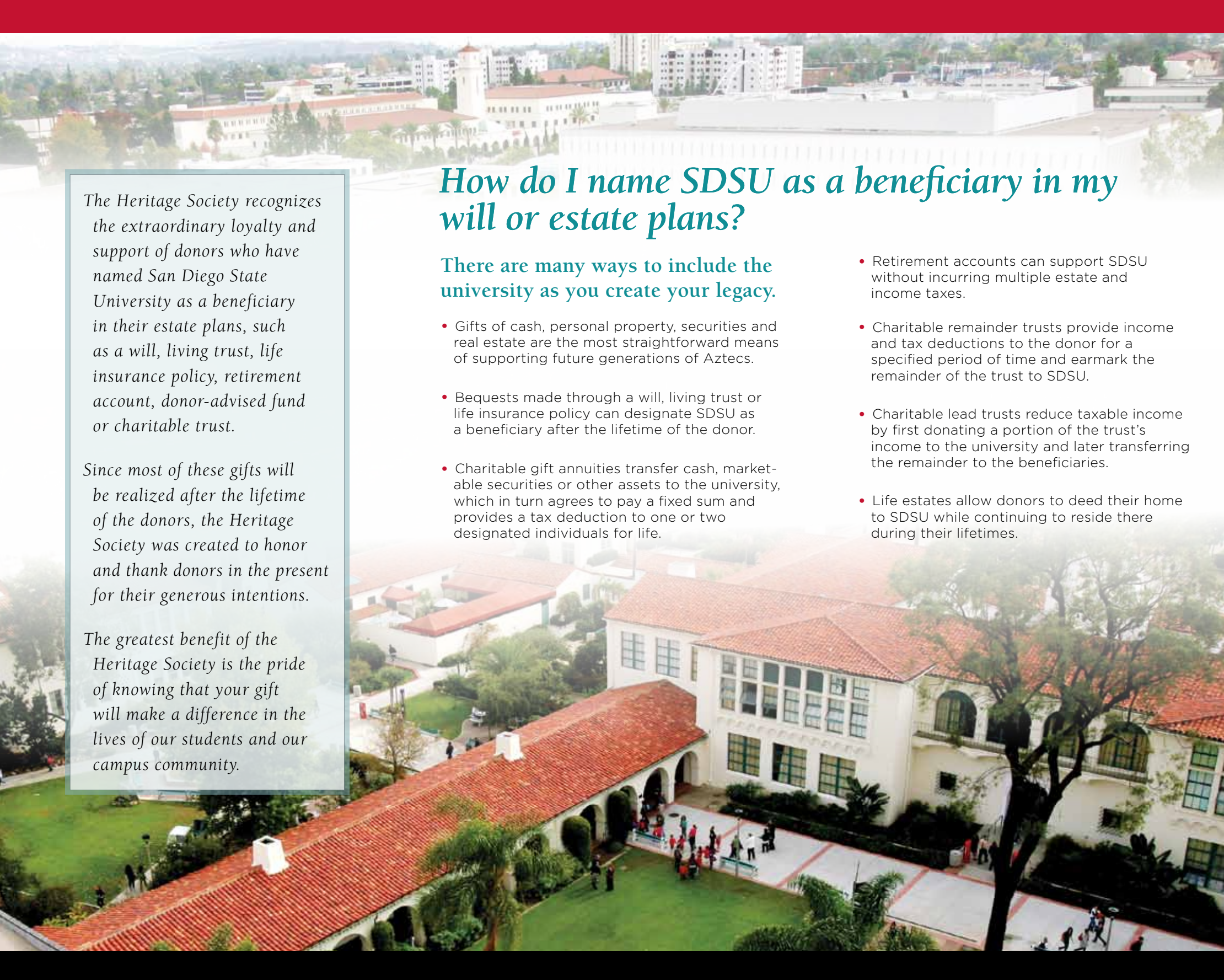


SAN DIEGO STATE UNIVERSITY

**HERITAGE**

*Society*

PLANNING MY GIVING



*The Heritage Society recognizes the extraordinary loyalty and support of donors who have named San Diego State University as a beneficiary in their estate plans, such as a will, living trust, life insurance policy, retirement account, donor-advised fund or charitable trust.*

*Since most of these gifts will be realized after the lifetime of the donors, the Heritage Society was created to honor and thank donors in the present for their generous intentions.*

*The greatest benefit of the Heritage Society is the pride of knowing that your gift will make a difference in the lives of our students and our campus community.*

## *How do I name SDSU as a beneficiary in my will or estate plans?*

### **There are many ways to include the university as you create your legacy.**

- Gifts of cash, personal property, securities and real estate are the most straightforward means of supporting future generations of Aztecs.
- Bequests made through a will, living trust or life insurance policy can designate SDSU as a beneficiary after the lifetime of the donor.
- Charitable gift annuities transfer cash, marketable securities or other assets to the university, which in turn agrees to pay a fixed sum and provides a tax deduction to one or two designated individuals for life.
- Retirement accounts can support SDSU without incurring multiple estate and income taxes.
- Charitable remainder trusts provide income and tax deductions to the donor for a specified period of time and earmark the remainder of the trust to SDSU.
- Charitable lead trusts reduce taxable income by first donating a portion of the trust's income to the university and later transferring the remainder to the beneficiaries.
- Life estates allow donors to deed their home to SDSU while continuing to reside there during their lifetimes.