MEMBER BENEFITS

If you have already included SDSU in your estate plans, please notify us so that we may officially welcome you into the Heritage Society. Your membership includes exclusive member invitations and gifts.

HERITAGE SOCIETY BENEFITS

• An invitation from the President to an annual donor appreciation event
• Invitations to sporting events
• Invitations to other exclusive University events throughout the year
• A distinctive lapel pin & annual gift
• Annual tax and estate planning guides
• The satisfaction of supporting future Aztecs and playing a part in SDSU’s development as a leading public research university
Help us build upon our success by joining the Heritage Society. You become a member of this inspirational group when you name SDSU as a beneficiary in an estate plan, such as a will, living trust, life insurance policy, retirement account, donor-advised fund, bequest, or charitable trust.

A bequest (gift in your will) works well for people who believe in San Diego State University but are unable to part with their resources today. Plus, bequests are:

- **Flexible.** You can change the amount or purpose of your gift at any time.
- **Versatile.** You can structure this gift in many ways, including leaving a percentage of your estate to SDSU.
- **Convenient.** You have access to your assets throughout your lifetime.

### What Are the Different Ways You Can Help Shape Generations of Aztecs and Create Your Legacy?

#### Giving Options

- **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 to support the program or college of your choice.
- **Charitable gift annuities** transfer cash, marketable securities or other assets to the university, which pay a fixed sum and tax-free income to one or two individuals for their lifetime.
- **Retirement accounts** can support SDSU without incurring multiple estate and income taxes. Retirement accounts may be the most tax-effective way to leave money to the university.
- **Charitable trusts** provide income and tax deductions for a specified period of time and earmark the reminder funds to SDSU or to beneficiaries, depending on trust type.
- **Life estates** provide a current charitable deduction while retaining the right to live in your home during your lifetime.