THIS IS OFTEN A POPULAR
time of year to reflect on your charitable
priorities. As you think about your
giving, consider your:

1 Tax benefits
In addition to knowing you are helping
continue our legacy of excellence, you
can usually enjoy a tax deduction for
2006 if you give by year end.

2 Appreciated assets
By making a gift of stocks, real estate
or other appreciated assets, you may
be able to take advantage of your gift's
full fair market value without paying
capital gains.

3 Income for life
A planned gift can allow you to establish
a gift arrangement now, obtain current
tax benefits, create a stream of income,
and provide a future gift to Cal Poly.

4 IRA funds
A new law may allow you, if you are
70-1/2 or older, to transfer up to
$100,000 from an IRA to Cal Poly
without paying additional income tax.

Cal Poly can work with you and your
advisors to develop a plan that matches
your charitable priorities and your
current circumstances. Any gift you
make can benefit the program or
department of your choice.

FOR MORE INFORMATION
about these giving options, or
about planning a bequest
to benefit Cal Poly, contact:

PLANNED GIVING
AND ENDOWMENTS
Heron Hall, Building 117
Cal Poly
San Luis Obispo, CA 93407-0444

Phone: (805) 756-7125
Toll Free: (800) 549-2666
Fax: (805) 756-2711
E-mail: taxwise-gifts@calpoly.edu
Web site: www.giving.calpoly.edu