DID YOU KNOW that it is possible to support Cal Poly and receive income for life?

Consider Mr. and Mrs. Gold, for example. They paid $50,000 for stock some years ago that is now worth $600,000, but the dividend pays just 1 percent annually. Now that they are retired, they would like more income from that investment.

If they sold the stock, they would be exposed to a heavy capital gains tax, reducing the amount available for re-investment. Instead, the couple uses the stock to fund a charitable remainder trust. The stock is sold, and the entire proceeds are invested in a diversified portfolio. The Golds receive 6 percent of the trust's fair-market value each year for life. Plus, they receive a current income-tax deduction and are able to put in place a significant gift for Cal Poly.

To see how a charitable remainder trust might fit into your long-term goals, visit www.plannedgiving.calpoly.edu for our easy-to-use calculator.

FOR MORE INFORMATION about charitable remainder trusts or supporting Cal Poly through your estate plan, please 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: plannedgiving@calpoly.edu
Web: www.plannedgiving.calpoly.edu