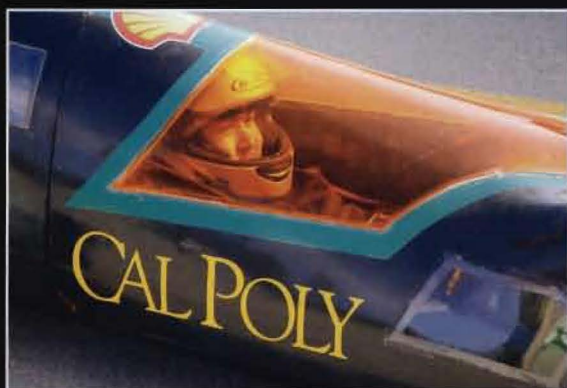


S U P P O R T
DESERVING STUDENTS

I N V E S T
IN THE NEXT GENERATION
OF CAL POLY FACULTY

E N H A N C E
LEARN-BY-DOING FACILITIES



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.

IT'S YOUR LEGACY

E X P L O R E I T



FOR MORE INFORMATION about charitable remainder trusts or supporting Cal Poly through your estate plan, please contact:

PLANNED GIVING AND ENDOWMENTS

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