

TOGETHER FOR SOU

For nearly 150 years, Southern Oregon University has distinguished itself as essential to the economic, social, and cultural well-being of Southern Oregon. Nestled in the foothills of Ashland, SOU is a place where students study in small classes, faculty members use the region's diverse ecosystems to conduct research, and where academic programs meet the regional, national, and global needs of the future.

THERE ARE MANY WAYS TO INVEST IN THE FUTURE OF SOUTHERN OREGON UNIVERSITY.

PLEASE JOIN US!

- **BEQUEST**

Make a gift through your will or living trust. You can give a specific amount of money, an item of particular value (such as shares of stock or a valuable asset), or a specific fraction of the remainder of your estate.

SAMPLE LANGUAGE FOR A GENERAL BEQUEST

"I give to Southern Oregon University Foundation, an Oregon nonprofit corporation, Federal Tax ID number 23-7030910, with its principal place of business in Ashland, Oregon, [the sum of \$_____; description of property; or percentage of residue], free of estate or

inheritance taxes, to be used to further the mission of the university at the discretion of the foundation's board of trustees."

- **QUALIFIED CHARITABLE CONTRIBUTION**

Also known as an IRA Charitable Rollover, the IRS provision allows those of you who have reached age 70½ to make a direct transfer from your IRA to the SOU Foundation, tax-free.

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- **RETIREMENT ACCOUNTS, INSURANCE AND COMMERCIAL ANNUITIES**

Complete your beneficiary designation form and name the SOU Foundation (Federal Tax ID Number 23-7030910) as the beneficiary of your account or plan, indicating the percentage or amount SOU Foundation is to receive.

- **CHARITABLE GIFT ANNUITY**

It's a simple contract, between you and the SOU Foundation. In exchange for your gift of cash or securities, the foundation agrees to pay a fixed amount of money to one or two individuals, for their lifetime. Remaining funds are used to support Southern Oregon University.

- **CHARITABLE REMAINDER UNITRUST**

A gift plan that establishes a trust and allows you to provide payments to yourself or others, during your or their lifetime, and/or for a fixed term of years. You can transfer cash, securities, and/or real estate to an agreed upon trustee who invests the assets and distributes payments. Remaining funds are used to support Southern Oregon University.

For more information

Please contact the Office of Development at Southern Oregon University to discuss further your charitable intent. We can provide a personalized document to share with your professional advisor. Communication with the staff is always confidential and never infers an obligation.

Contact your professional advisor for advice on whether this gift plan is right for you.



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