



CHANGE THE WORLD. START WITH YOURS.

PLANNED GIFT GUIDE

A planned gift is a charitable donation arranged during a donor's lifetime, but available to Fielding at a much later date.

Contributions like these help sustain Fielding into the future. **Thank you for considering such a gift!**

FOUNDERS CIRCLE MEMBERSHIP BENEFITS:

- Free Fielding publication annually
- Updates directly from the University Leadership Team
- Invitations to special events at the university
- Many recognition opportunities

THE FLEXIBILITY OF A PLANNED GIFT:

- You are free to alter your plans at any time.
- You can structure your gift in different ways: a specific amount of money, piece of property or percentage of your estate.
- You retain control over your assets should you need them during your lifetime.

NEXT STEPS:

1. Decide on the kind of gift you want to make and its designation.
2. Contact the Office of Development to discuss opportunities and ask questions. All inquiries are kept strictly confidential.
3. Consult with your estate advisor on the gift option that will be beneficial for you and your portfolio of assets. In some cases, a planned gift to Fielding will allow you to greatly reduce the gift or estate tax cost of passing assets on to your heirs.

Gifts to the **Founders Circle** are most often made by bequest through one's will or trust. They can also be made through means that allow the donor to receive current tax benefits and income for life, such as a charitable remainder trust.

WAYS TO GIVE:

BEQUEST GIFTS can be an absolute dollar amount, a specific asset or a percentage or residue of your estate.

RETIREMENT PLAN/IRA: designate Fielding in whole or in part as a beneficiary of a qualified retirement plan (or its portion)

LIFE INSURANCE POLICY: designate Fielding as an owner and/or beneficiary in whole or in part of your life insurance policy

GIFTS OF REAL ESTATE AND OTHER GIFTS

OFFICE OF DEVELOPMENT

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All checks should be made to:
Fielding Graduate University
Tax ID: 95-2882724