
Other Ways to Give

You can fund your legacy gift with cash, marketable securities, real estate, excess retirement funds and even a paid-up life insurance policy. Our Planned Giving team can suggest creative ways to give that meet your goals.

Take the Next Step

Your life of consequence supports future generations of Washington and Lee students. We are grateful for your thoughtful generosity and pledge to honor your personal legacy as we work together to impact students' lives. It's not just about giving; it's about being remembered for what you stood for. Leave a legacy of impact, and let your voice be heard for generations.

If you have questions about making a legacy gift, please contact us today or visit plannedgiving.wlu.edu.



For more information on these gifts or any questions on gift planning, please contact:

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Your Legacy
is Your Story



Your legacy is your life's story, a story of purpose, lived experiences, passion and values. Giving with your estate is a powerful way to continue that story into the future, ensuring what matters most to you today will be made stronger tomorrow. It's your way to tell your story for generations to come.

Pay it Forward

Your legacy is an opportunity to make a profound impact as you pass along your values to individuals and organizations that you care about. Driving success in the future begins with a decision today. There are many creative ways you can make a legacy gift that shapes the future for Washington and Lee University while helping you, your estate and your heirs.

Charitable Bequest

A charitable bequest is a flexible way to make a lasting impact: simply name Washington and Lee in your will or trust and designate a gift of a specific dollar amount, a particular asset, a percentage of your estate or the remainder of your estate once your other bequests have been fulfilled. Your charitable bequest allows you to keep complete control of your assets during your lifetime, and you can change your gift at any time.

Charitable Remainder Trusts

A Charitable Remainder Trust (CRT) provides income to you or others in return for your contribution today. By establishing a CRT, you transfer assets into a trust that pays a fixed or variable income for one or more lifetimes. You receive an immediate income tax deduction and avoid capital gains taxes when contributing appreciated assets. Ultimately, the trust's remainder supports W&L's future.



Beneficiary Designation

A beneficiary designation can be as simple as submitting a form to your bank or financial services company. Beneficiary designations can be applied to bank accounts, investment accounts, retirement plans, insurance policies, annuity contracts or other financial instruments. Like a charitable bequest, you can modify your gift if your circumstances change.

Life Income Gifts

A life income gift provides income to you or others in return for your contribution today. The income can be fixed or variable and can go on for one or more lifetimes. You receive an income tax charitable deduction for the charitable value of your contribution and can avoid capital gains taxes if you contribute appreciated assets. Life income gifts are particularly attractive because you may be able to increase your spendable income and reduce your taxes while supporting W&L's future.

Gifts from IRA Accounts

If you are age 70½ or older, your IRA account can be an excellent way to make a tax-wise gift to empower W&L. A qualified charitable distribution (QCD) allows you to make a tax-free rollover from your IRA directly to Washington and Lee. If you are subject to required minimum distributions (RMD), your QCD contribution can reduce the income tax on your RMD.

Donor-Advised Fund (DAF)

If you have a donor-advised fund (DAF), check with your sponsoring organization about what will happen to money left in your DAF at the end of your lifetime. You may have the opportunity to direct the remainder of your DAF to Washington and Lee.