



Retirement Income and Support for Washington and Lee University

THE BENEFITS OF A LIFE INCOME GIFT

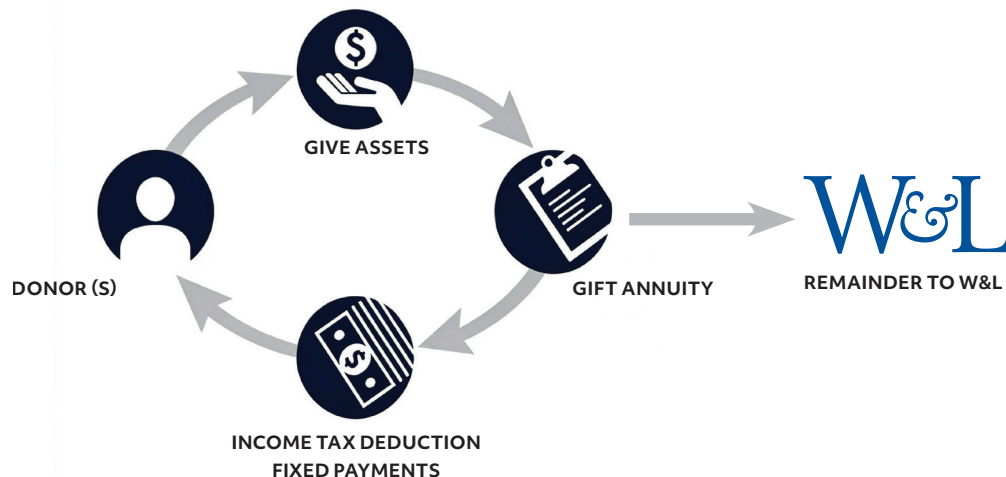
FINANCIAL SECURITY AND SUPPORT FOR W&L

Life is full of competing priorities. Often the things we want to do don't coordinate with what we know we need to do. If you are in or approaching retirement, you know that one priority is making sure you have enough income. Yet, you may also want to continue your support of favorite charities. Saving and charitable giving don't have to be competing priorities.

THE BENEFITS OF ESTABLISHING A CHARITABLE GIFT ANNUITY

A charitable gift annuity is simple. You make a gift to W&L of cash or appreciated securities, and the university agrees to pay up to two individuals a fixed income for life. The payments never fluctuate and are not affected by changes in the economy or financial markets. W&L will give you a simple agreement for your records. Then just wait for the payments. In return for your gift, you will get an income tax charitable deduction for a portion of your gift. In almost every case some of your annuity payments will be partially tax-free for a time.

W&L



HOW TO ESTABLISH A CHARITABLE GIFT ANNUITY WITH W&L

Once you decide to move forward to establish a charitable gift annuity with Washington and Lee University, here is the process. We will guide you every step of the way.

- Contact the Office of Gift Planning to ensure that the age(s) of the annuitant(s) meet the gift annuity policies at W&L.
- If you have not received a financial illustration for the gift you are considering, request the illustration from the Office of Gift Planning.
- Request a gift annuity application form from the Office of Gift Planning.
- Complete the information on the application.
- Send the gift annuity application to the Office of Gift Planning.
- If you are using a check to fund the gift, enclose your check with the application.
- Shortly after your application is received you will be sent a charitable gift annuity agreement, along with tax reporting information for when you file your income taxes.
- You'll need to sign the charitable gift annuity agreement and return it to W&L. The university will provide a fully signed agreement to you.

YOUR PRIORITIES ACCOMPLISHED

- You will have provided for additional income.
- You will have protected some of your assets from market downturns in exchange for safe income.
- You will have made a significant gift to W&L.

LEARN MORE

Office of Gift Planning
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plannedgiving.wlu.edu

