



5 WAYS TO GIVE th REUNION



TOGETHER, FOR CARLETON

There are many ways to participate and you can make a gift that fits your goals and your family's financial situation.

Our Carleton Journey and Why We Give

- Chance Meeting 1968
- Academic Excellence
- Diverse Challenges
- Intellectual Freedom
- Focused Mentoring and Discipline
- Novel Perspective Exposures
- Life Skills for Success
- Love and Marriage

Join us in giving your legacy to sustain and grow the Carleton College we cherish!

—Dan Peterson '72 and Mary Lindahl Peterson '72

MAKE AN IMMEDIATE DIFFERENCE

Making a gift today is a great option if you feel financially comfortable or want to maximize your charitable income tax deductions. Your gift now will start helping students right away.

CASH

Giving by cash, check, or credit card is quick and easy, and it will get you the maximum charitable income tax deduction.



“I always give to the Alumni Annual Fund, and will continue to do so. Between planning for our 50th and the COVID shutdown, I learned I could also allocate cash for our Class ’72 Fund. I knew there was a silver lining in that pandemic cloud!”

—Margaret Crowley ’72

STOCKS OR MUTUAL FUNDS

By giving appreciated stock to Carleton, you’ll receive the maximum charitable income tax deduction and avoid capital gains taxes.



“After a long and interesting career as a research scientist in the petroleum industry, I had a lot of company stock that I received in compensation in my retirement account that had appreciated manyfold. By donating some of it to Carleton, we avoided tax on the capital gains and were able to take a deduction as if we had contributed the current market value.”

—Jack Johnson ’72 and
Carol Cathcart Johnson ’72

IRA QUALIFIED CHARITABLE DISTRIBUTION (QCD)

If you are at least 70-1/2 years old, you can transfer up to \$100,000 from your IRA directly to Carleton. Unlike a regular withdrawal, this gift won’t be taxed. Depending on your age, it may also count toward your required minimum distribution.



“For our 50th, I’m going to make a Qualified Charitable Distribution to Carleton from an IRA. Instead of paying taxes on this income, I can donate it to the college to support financial aid, especially aid that supports equity of study opportunity. Win/win!”

—Nancy Ashmore ’72

PLAN A GIFT FOR THE FUTURE

Join the Heywood Society by making a will or trust provision or adding Carleton as a beneficiary of a retirement plan, and you can make a meaningful commitment today with little or no impact on your current cash flow or investments.

WILL OR TRUST PROVISION

You'll retain maximum flexibility and asset control if you plan a gift using a will or trust. By expressing your gift to Carleton as a percentage (e.g., "20 percent of the residue of my estate"), you'll ensure that each of your heirs will get the designated portion of your estate, no matter how much its value changes.



"We're both incredibly grateful to Carleton for its many gifts to us and are glad to have found a way to give something back. We aren't able to be as generous now as we would like, but using a trust provision will allow us to provide a gift to Carleton that more accurately reflects our gratitude."

— Ann Iijima '72 and Myles Bakke

RETIREMENT PLAN PROVISION

By making Carleton a beneficiary of your IRA, 401(k), 403(b), TIAA-CREF, or other qualified plan, you can support the college and simultaneously protect your heirs from paying extra taxes. Simply add Carleton to your account's beneficiary designation form. You can still give to other heirs from the same account by expressing your gift to Carleton as a percentage (e.g., "20 percent of my IRA"), but the portion given to Carleton will not be subject to estate taxes.



"For years we've made it a priority to give regularly to organizations that we believe in. As we began our estate planning, with the help of our financial adviser, we chose to set aside a portion of our estate in the form of a Charitable IRA for a few key organizations. Carleton was in the center of our hearts and at the top of our list of beneficiaries."

—Tom Boe '72 and
Kathleen Kruyer Boe '73

GIVE PROPERTY

You can deed your home (preferably unencumbered by a mortgage) to Carleton today and retain the right to use it for the rest of your life. You'll receive a charitable income tax deduction for a portion of the property's value. After your death, the funds from its sale will support Carleton.



"The 50th reunion reminded us of the many ways that Carleton had enriched our separate and collective life experiences. We realized that we wanted to give back to the college to ensure and share in its continued success. We were pleased to be able to gift our summer home as a large part of this agenda. This gift arrangement allows us to retain the use of our home and schedule the transfer to Carleton."

—Joe Braucher '63 and
Nancy Braucher '63

GIVE AND RECEIVE

Maybe you feel financially comfortable now, but you're concerned about the future. You could make an investment today that will provide you with a lifetime income—and support Carleton at the same time.

CHARITABLE REMAINDER UNITRUST

You can fund a charitable remainder unitrust with stock, real estate, or cash (we suggest a minimum gift of \$100,000). You'll receive investment dividends for the rest of your life, and avoid paying capital gains taxes while receiving a charitable income tax deduction. After your death, Carleton will receive the full amount of your gift.



“We’ve been pleased to establish a couple of charitable remainder unitrusts because we can fulfill shorter term goals for our family, as well as longer-term goals for the impact we hope to have at Carleton. We are providing income for our daughter now and will have a meaningful impact at Carleton later.”

—Pat MacCorquodale '72, P '94
and Phil Krider '62, P '94

CHARITABLE GIFT ANNUITY

A charitable gift annuity will give you a fixed income, determined by your age, for the rest of your life. Any money that remains after your death will go to Carleton. You can fund it with appreciated stock or cash (we suggest a minimum gift of \$10,000) and avoid paying capital gains taxes while receiving a charitable income tax deduction.



“The CGA provided us with much of what we need: guaranteed income for the rest of our lives, partial tax exemption for that income, plus a tax deduction in the year the gift is made, and the ability to make a nice gift to Carleton that would pay out at our deaths but count now for our 50th gift!”

—Caesar Sweitzer '72 and
Peggy Salagovic Sweitzer '71

These are some of the most common types of gifts, but more options are available. Visit go.carleton.edu/giftplan or call us at 866-208-3889.



Carleton

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