

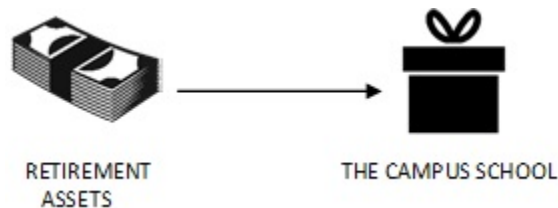


THE CAMPUS SCHOOL  
*of Carlow University*

## ***Giving from Your Retirement Plan***

Donating part or all of your unused retirement assets, such as your IRA, 401(k), 403(b), pension or other tax-deferred plan, is an excellent way to make a gift to The Campus School.

If you are like most people, you probably will not use all of your retirement assets during your lifetime. You can make a gift of your unused retirement assets to help further our mission.



### **Benefits of Gifts of Retirement Assets**

- Avoid potential estate tax on retirement assets
- Your heirs would avoid income tax on any retirement assets funded on a pre-tax basis
- Receive potential estate tax savings from an estate tax deduction

### **How to Make a Gift of Retirement Assets**

To leave your retirement assets to The Campus School, you will need to complete a beneficiary designation form provided by your retirement plan custodian. If you designate The Campus School as beneficiary, we will benefit from the full value of your gift because your IRA assets will not be taxed at your death. Your estate will benefit from an estate tax charitable deduction for the gift.

### **More on Gifts of Retirement Assets**

Did you know that 60%-70% of your retirement assets may be taxed if you leave them to your heirs at your death? Another option is to leave your heirs assets that receive a step up in basis, such as real estate and stock, and give the retirement assets to The Campus School. As a charity, we are not taxed upon receiving an IRA or other retirement plan assets.

### **Contact us**

If you have any questions about gifts of retirement assets, please Tiffany Jimenez, Campus School Director of Development, at 412-578-6260 or via email at [tmjimenez@carlow.edu](mailto:tmjimenez@carlow.edu).

Please let us know if you have already included The Campus School as a beneficiary of your retirement assets. We would like to thank you and recognize you for your gift.