

# PLANNED GIVING OFFICE

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Luisa Gil's major at BU is political science, a decision she made after careful consideration. This bilingual young scholar had a keen interest in political science in high school, but medicine and business enticed her, too. Being able to attend BU and explore different options was a big benefit: "I finally settled on something I had always been passionate about—government and politics." She plans on law school next.

Luisa Gil (CAS'19)

Boston University Planned Giving

# YOU CAN MAKE A DIFFERENCE

IF YOU HAVE EVER WANTED TO MAKE A SIGNIFICANT DIFFERENCE WITH BOSTON UNIVERSITY AND ITS MISSION, THERE IS NO BETTER TIME THAN NOW.

We can help you find a way to make a satisfying gift that moves our mission forward, while at the same time saving you money, and possibly providing you with new sources of income.

**Make A Gift Today.** If you want to make an impact and receive income tax savings, make your gift now and see the results of your generosity in action immediately.

**Avoid Capital Gains.** If you own stock (or any appreciated asset), give that asset to our organization. BU receives the current value of the stock, and you receive an income tax deduction in the same amount and avoid capital gains on the transfer.

**Start New Income.** Fund a charitable gift annuity or charitable remainder trust and receive the double benefit of tax savings and lifetime payments.

**Blend Your Giving.** For even more impact, consider a gift today of your IRA distribution, real property, appreciated assets or cash, and complement it with a gift in your will or estate plan. You benefit by seeing and knowing you are building a legacy that will grow.

**"This scholarship allowed me to come to BU. Without it, I wouldn't be here."**

Luisa's scholarship was funded by a bequest. To learn more about how you can support a student like Luisa Gil through a planned gift, contact the **Planned Giving office** at 800-645-2347 or [opg@bu.edu](mailto:opg@bu.edu), or visit [bu.edu/plannedgiving](http://bu.edu/plannedgiving).

**Education is a gift. Pass it on.**

FALL 2017

# BU LEGACY

—The Power of Planned Giving—

BOSTON UNIVERSITY

## PAYING IT FORWARD SO OTHERS CAN PURSUE THEIR PASSION



**JACK MIDDLETON**  
(LAW'56)

Just out of the Marines after the Korean War, Jack Middleton spent a year as a weather observer on the summit of Mount Washington in New Hampshire. But soon enough, he decided that law school would be his path to true professional heights.

Middleton's BU School of Law education prepared him for a long and distinguished career at what is today McLane Middleton in Manchester, New Hampshire. President and director of the litigation department, he has practiced there as a trial attorney for more than 60 years. Along the way, he decided to honor his alma mater by becoming a BU Law donor, and he began making leadership-level annual gifts. Then, in order to have a more lasting impact, he built upon that generous legacy by creating a charitable gift annuity for the

School of Law Fund and included a bequest for BU Law in his will.

**"The law school needs to keep attracting good candidates and supporting them financially, providing them with the same good opportunities I had..."**

Middleton says that BU Law gets definitive credit for his satisfying, challenging career. "I know that being able to earn a good living was a result of what I learned at the law school, a message I've shared often with others," he said. "The law school needs to keep attracting good candidates and supporting them financially, providing them with the same good opportunities I had. And BU Law alumni are critical to keeping a legal education affordable."



SHARE OUR SPIRIT

# ROLLOVER YOUR IRA FOR GOOD



GIFTS

TAX BENEFITS

## TOGETHER WE CAN MAKE A DIFFERENCE DURING THIS SEASON OF GIVING

The best year-end giving plans make a difference in the lives of others and can improve your own financial and/or tax situation. Consider an immediate gift, a gift from your individual retirement account, or a gift that provides you with fixed payments.

### With the right tools you can:

- Save taxes
- Increase your income
- Help others while helping yourself

### Consider the following gift options:

#### Charitable Gift Annuity

A gift annuity delivers you fixed payments for life, while providing a significant income tax deduction this year.

#### Charitable Remainder Trust

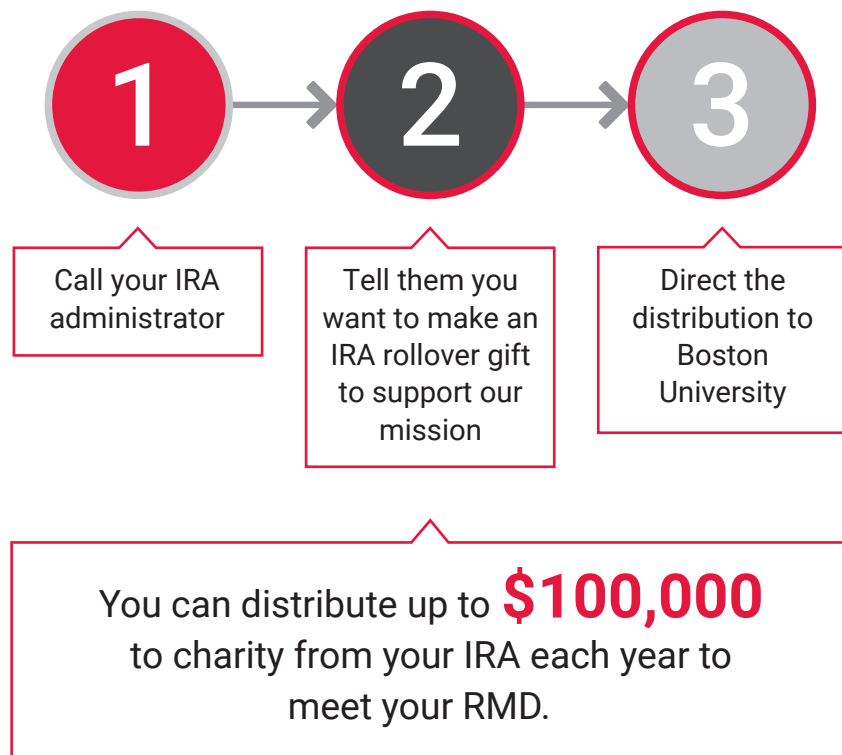
Enjoy tax savings by turning appreciated assets, such as stock, into income.

Contact us for a free illustration of these plans to see how you could benefit and create a lasting legacy to sustain our work.

There is a way for you to share in the spirit of giving this holiday season that you may not have heard about. It's called the **IRA charitable rollover** and it is a way you can make a gift to support BU and save on taxes this year.

If you are 70½ or older, you can use the IRA charitable rollover to help BU continue our important work. The IRA rollover may allow you to meet your required minimum distribution (RMD) by directing your distribution to BU rather than taking it yourself.

## HERE'S HOW IT WORKS:



For the IRA rollover to work for you, it is important that you do not take the distribution. Ask your IRA administrator to make the distribution directly to Boston University. While you will not receive an income tax deduction for your gift, you will reduce your taxable income and support the areas at BU you care about.

Do you have a 401(k)? The IRA charitable rollover does not apply to a 401(k), but you can open an IRA, transfer funds to it and take advantage of this opportunity.

Call or email us to learn more about the IRA charitable rollover and how it can benefit you.



AS WE LOOK TOWARD THE UPCOMING NEW YEAR, WE KNOW THAT THE GENEROSITY OF THOSE WHO INVEST IN BOSTON UNIVERSITY MAKE ALL OF THE DIFFERENCE IN OUR SUCCESS. YOUR SUPPORT MEANS A LOT TO US!



Visit our website at [bu.edu/plannedgiving](http://bu.edu/plannedgiving) and download your FREE copy of our guide to planning your estate.

