

Creating a *Laurentian* Legacy

Gift planning with St. Lawrence can help you reach your financial goals and create an enduring legacy for the University.

This page details some of the options you'll have in each stage of your life.



20s
&
30s

Nearly all our alumni start a career or post-Baccalaureate work shortly after graduation. You can name SLU as a charitable beneficiary of a retirement account or life insurance policy.

Wills are often written as you build a career or business, grow your assets, get married, start a family, and plan for the future. When drafting a will, please consider making a bequest to St. Lawrence.

Join the Sustaining Saints! Alumni, parents and friends who have given consecutively for at least five years, or who have given every year since graduation (for at least two years).

40s
&
50s

Your assets may have grown to a point that allows you to provide for loved ones and increase the charitable giving in your estate plan. Adjusting or rewriting your plan might provide a naming opportunity for your family or to remember a loved one at St. Lawrence.

Consider the tax-smart gift of appreciated securities (stocks, bonds, and mutual funds) you have held for more than a year. The University receives the full market value of the stock on transfer and the donor avoids capital gains. This is a great way to make an annual gift to St. Lawrence and plan for the future.

60s
&
70s

A deferred charitable gift annuity is one way to receive deferred income when you retire. By giving this way, you will provide valuable support to St. Lawrence. You will also receive a charitable tax deduction and fixed payments for your lifetime or the lifetime of a loved one.


Consider donating an asset, such as securities or real estate, to establish a charitable remainder unitrust. This financial vehicle allows you to put the full, fair-market value of your asset to work and receive lifetime income—while avoiding capital gains tax.

80s
&
90s

Have a steady and reliable source of income, regardless of the ups and downs of the market. Support St. Lawrence with an immediate charitable gift annuity. Funding this gift will provide valuable support to the University as you receive life income payments, defer capital gains, and receive a charitable income-tax deduction.

By donating real estate to St. Lawrence during your lifetime, you can experience the satisfaction of seeing your gift in action. If it is property the University will sell, the cash proceeds will be put to work to benefit our students. If St. Lawrence retains and uses the property, you can see it meet our immediate needs.

Do you have more in your retirement plan than you and your family need? After turning 70 ½, you have new financial options, including the IRA charitable rollover. Using the IRA charitable rollover in support of SLU will help you meet your required minimum distribution without increasing your income taxes. You can support the St. Lawrence Fund, capital projects, and either grow or establish a named fund for a scholarship, internship, or a program that is important to you.

 A legacy gift through your estate plans or establishing a life-income gift qualifies you to be a member of the University's Legacy Society.

You can join by contacting:

D. Kurt Terrell, Director of Planned Gifts at kterrell@stlawu.edu, call 315-229-5026, or visit plannedgifts.stlawu.edu/assist.