



PLANNED GIVING



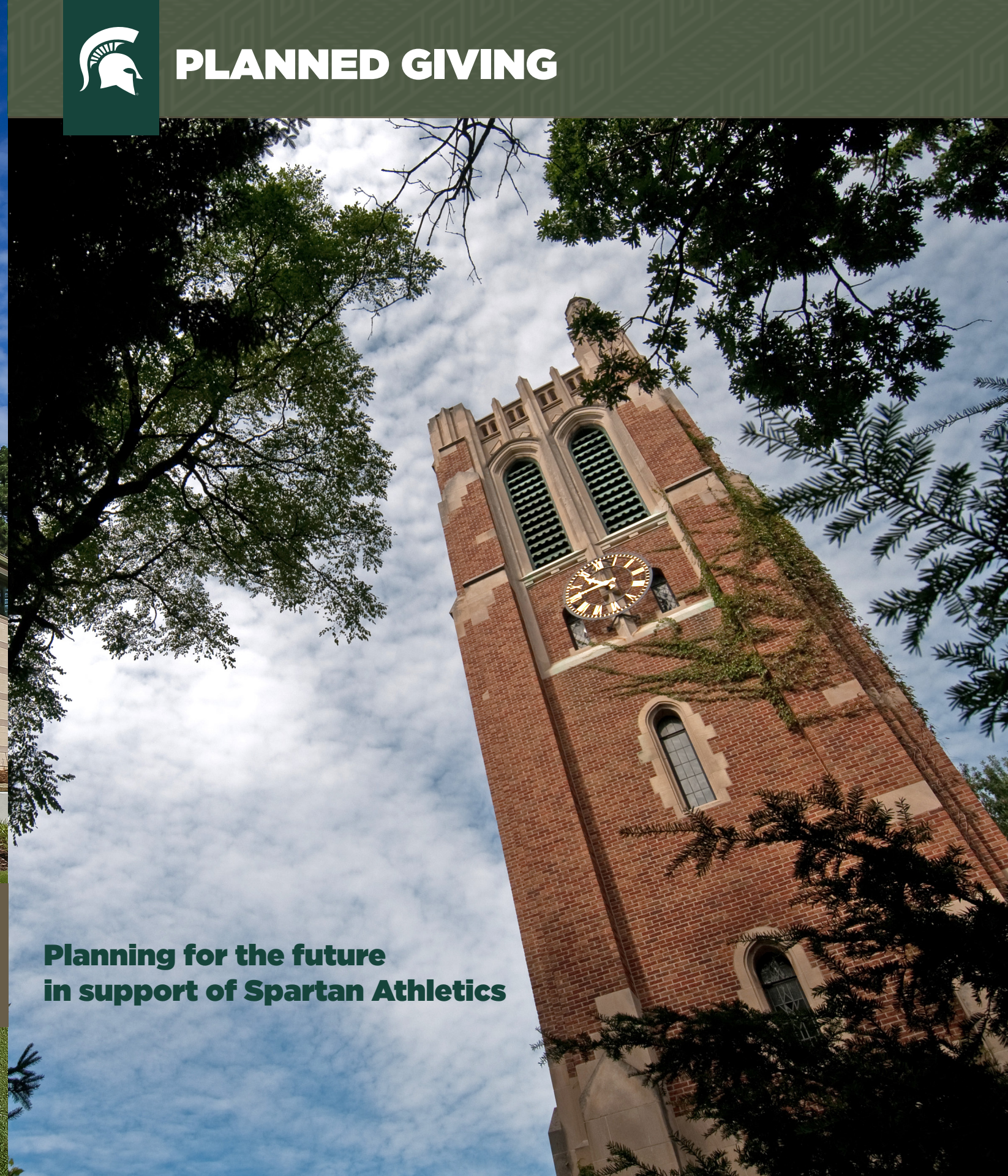
**The future of Michigan State Athletics
depends on solid financial planning**

**A planned gift is an opportunity
to make a lasting impact to
benefit future Spartans.**

Lasch Family Golf Center



**spartanfund.net
517-432-4610**



**Planning for the future
in support of Spartan Athletics**



The future of Spartan Athletics is bright with solid financial planning & support

Whatever the reason may be - earning a degree that was a catalyst for a successful career or the simple joy when our teams claim “Victory for MSU” - Michigan State University and MSU Athletics hold a special place in the hearts of many Spartans. Turn your passion for MSU into a lasting legacy with the university you love by considering a planned gift.

Estate planning is for everyone, regardless of age or assets, and is a strategic way for you to make significant contributions that may not otherwise be possible during your lifetime.

The future of Michigan State University and MSU Athletics will depend on solid financial planning and the philanthropic support of alumni, donors, and friends today and tomorrow.

RECOGNITION

All donors documenting a planned gift (any size) with Michigan State University will be recognized and included in the Linda E. Landon Society. Donors making a \$200,000 (minimum) planned gift or more will be recognized in MSU’s Benefactors Plaza for joining one of the following university donor societies:

Jonathan L. Snyder Society	\$200,000 planned
Theophilus C. Abbot Society	\$500,000 planned
Robert S. Shaw Society	\$1,000,000 planned
Frank S. Kedzie Society	\$1,500,000 planned
Clifton R. Wharton Society	\$3,750,000 planned
Joseph R. Williams Society	\$7,500,000 planned
William J. Beal Society	\$15,000,000 planned



Benefactors Plaza

EARN SPARTAN POINTS!
An irrevocable, documented planned gift with MSU Athletics also earns one (1) Spartan Point for every \$1,000 (based on allowable charitable deduction), providing a way to earn priority now for the future gift.

TYPES OF PLANNED GIFTS

CHARITABLE BEQUEST

For many current donors to MSU Athletics, a charitable bequest is an ideal way to combine sound estate planning with thoughtful giving that will perpetuate their annual gifts after they are gone. A charitable bequest is an instruction in your will, or personal trust, to provide a future gift of cash or other assets to a charitable organization such as Michigan State University, for the future benefit of MSU Athletics and student-athletes. Charitable bequests are:

- PERSONAL because you may choose the sport or program to designate your bequest and provide assistance to future student-athletes.
- SIMPLE because a bequest requires no immediate or irrevocable transfer of assets or complicated arrangements.
- ENDURING because a bequest may create an endowed fund which will provide a perpetual stream of support to the sport or program of your choice within MSU Athletics.
- FLEXIBLE because you can change your mind and alter your estate plans if your financial needs or philanthropic goals change.

If you do not have a will, please consider meeting with your attorney to establish a charitable bequest for the benefit of MSU Athletics. If you already have a will, your legal counsel can help you include a charitable bequest for MSU Athletics.



Suggested language for inclusion of MSU Athletics in your will:

“I give and devise to Michigan State University, East Lansing, Michigan, the sum of \$_____ (or state percentage of estate) to be held, administered, and used by the Board of Trustees for support of Michigan State University’s Department of Intercollegiate Athletics. I instruct that all of my charitable gifts shall be made, to the extent possible, from property that constitutes “income in respect of a decedent” as that term is defined in the Internal Revenue Code.”

For more information, or to document your gift, contact the Spartan Fund at 517-432-4610.

CHARITABLE GIFT ANNUITY

The charitable gift annuity and deferred gift annuity are life-income gifts that are easy to establish. In exchange for an irrevocable gift of cash or marketable securities, the MSU Foundation will contractually agree to pay a guaranteed stream of lifetime income to you and/or a second beneficiary. The MSU Foundation administers the gift annuity program for the benefit of MSU and student-athletes. The annuity rate depends solely on the age of the beneficiary(ies). Your gift annuity payments can begin immediately, or, through a deferred gift annuity, a specified future date (minimum deferment period is one year). All gift annuity contracts are guaranteed by the unrestricted assets of the MSU Foundation.

CURRENT CHARITABLE GIFT ANNUITY

One and two life gift annuity rates are determined solely by the age(s) of the donor(s). Gift annuity rates, applicable to both males and females, are subject to periodic review and change. The minimum amount required to establish a charitable gift or deferred gift annuity through the MSU Foundation is \$10,000. The minimum age to receive gift annuity income is 60 years. We invite you to contact the gift advisors within the MSU Office of Gift Planning for specific and personal gift annuity illustrations.

DEFERRED-PAYMENT GIFT ANNUITY

The deferred-payment gift annuity plan is a variation of the current gift annuity (as described above) and is more likely to appeal to younger donors in the 50 to 65-year age bracket who have a high current income, wish to remember and support MSU Athletics, need a current tax deduction, and are interested in augmenting retirement income on a tax-favored basis.

The deferred-payment gift annuity involves a current irrevocable gift of cash or marketable securities. In exchange, the MSU Foundation agrees to pay the donor(s) a fixed and guaranteed annual income starting at a specified future date.

The donor(s) will be eligible for an immediate charitable deduction applicable to their federal tax return. A portion of each annuity payment will be received on a tax-free basis over the life expectancy of the annuitant(s). When appreciated, long-term securities are used to fund a current or deferred charitable gift annuity, any applicable capital gains tax on the securities gifted is spread out over the actuarial life of your Charitable Gift Annuity contract.