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LSU FOUNDATION
PLANNED GIVING
3838 WEST LAKESHORE DRIVE
BATON ROUGE, LA 70808

For more information about including the LSU Foundation in your estate planning or to receive additional copies of this brochure, please call 225-615-8914 or 800-452-7928.

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Planned Giving
3838 West Lakeshore Drive
Baton Rouge, LA 70808
Telephone: 225-615-8914

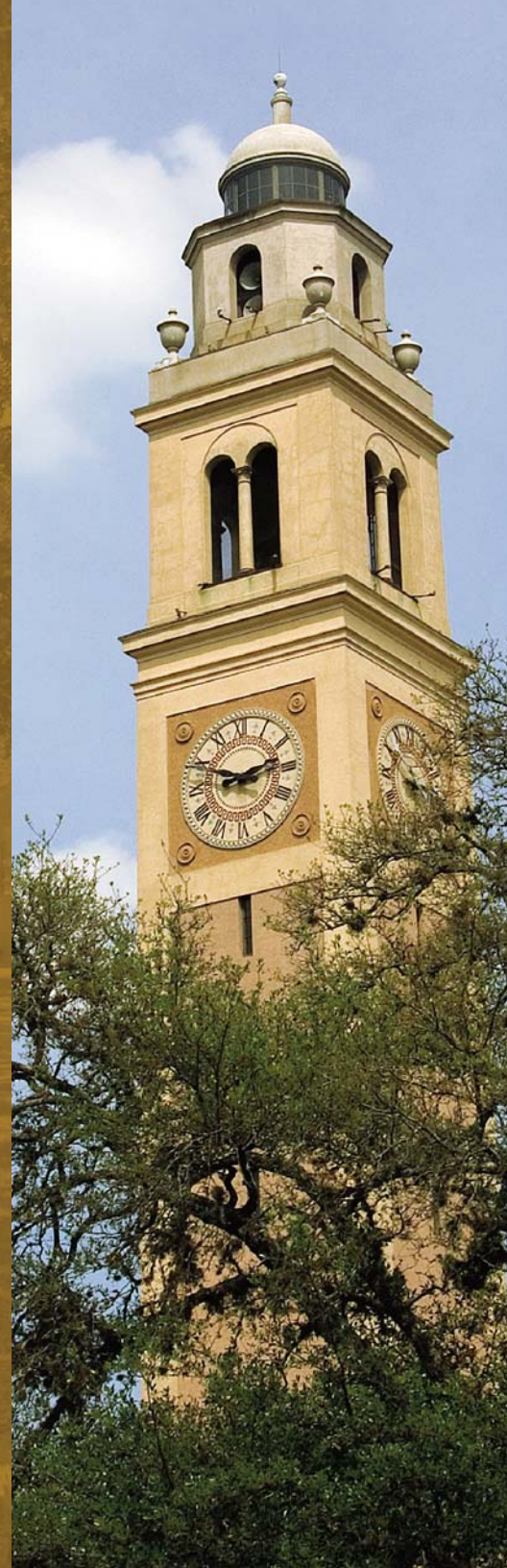
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LSU Foundation Estate and Planned Giving



A planned gift to the LSU Foundation can be one of the easiest, most fulfilling ways to support the University you love. Several options exist that could help you give more than you thought possible while still achieving your personal financial goals.

Some options available for using a planned gift for the LSU Foundation include:

Bequest — Leave a gift specified to the “LSU Foundation” in your will. Charitable bequests can be structured in many ways and are deductible for estate tax purposes.

Retirement Plan Assets — Simply name the “LSU Foundation” as beneficiary of part or all of your IRA or retirement plan. This could result in estate tax savings and, in some cases, income tax savings as well. Additionally the Pension Protection Act of 2006 allows you to make a direct distribution from the IRA to the LSU Foundation without a penalty for the withdrawal. There is no charitable deduction allowed for the distribution which has a limit of \$100,000 for an individual or \$200,000 for a couple.

Appreciated Property — Donate securities or real estate* that you have owned for over a year and avoid capital gains tax on appreciation. You may also qualify for a charitable income tax deduction equal to the full value of the donated assets.

Life Income Plan — Establish a plan that makes lifetime payments to you, your spouse, or anyone you name. The remainder will pass to the LSU Foundation for the purpose you specify. The amount projected to pass to the LSU Foundation is tax deductible.

Charitable Remainder Trusts — Provide a retirement plan that offers maximum income

and makes a deferred charitable gift to the LSU Foundation.

Charitable Lead Trust — Establish a charitable lead trust to make payments to the LSU Foundation for a set period of time. The remainder will then pass to your children or grandchildren. A lead trust could create significant gift and estate tax savings.

Life Insurance Policy — Simply name the LSU Foundation as beneficiary of your life insurance policy. This could result in estate tax savings. Or donate a policy that you no longer need and qualify for an itemized income tax deduction

Remember **you** control how the LSU Foundation uses your gift. As an added benefit, when you make a planned gift and provide us with your intent, the LSU Foundation honors you with membership in the prestigious 1860 Society.

Join others who have chosen to make a gift in perpetuity to the LSU Foundation. The 1860 Society members are invited to the LSU Foundation annual reception, where they receive their membership lapel pin and are recognized for their generous commitments.



Contact us to learn more about these and other planned giving options. We can also work with your financial advisor or estate planner to help you customize your gift.

The information in this publication is not intended as legal or financial advice. Contact your own professional advisor.

* All gifts of real estate are subject to approval of the Gift Acceptance Committee of the LSU Foundation Board of Directors.

Complete this form and our friendly planned giving staff will contact you with more information.

- Please send more information about tax-advantaged ways of giving to the LSU Foundation.
- I have included the LSU Foundation in my estate plans through:
 - my will
 - a trust
 - life insurance
 - gift annuity
 - my retirement plan assets
 - other
- This is how I/we wish my/our name(s) to be listed with the 1860 Society:
 - I/we wish to remain anonymous.
 - donor listing
 - gift recording

Signature

Name (please print)

Address

City

State

Zip

Phone

Date of Birth

E-mail