

# PLANNED GIVING OPTIONS AT A GLANCE

TYPE OF GIFT	HOW TO MAKE THE GIFT	BENEFIT TO CANISIUS COLLEGE	BENEFIT TO YOU
<p><b>Bequest</b></p>	<p>Name Canisius College as a beneficiary in your Will or Living Trust.</p> <p><b>Gifts may be structured as:</b></p> <ul style="list-style-type: none"> <li>• A fixed amount of cash or securities</li> <li>• A percentage of your estate</li> <li>• The remainder of your estate after all other obligations have been satisfied</li> <li>• A specific gift of an asset such as real estate or other items of value</li> </ul> <p>When naming Canisius in your Will or Living Trust – please note that the formal name of the college is <b><i>The Canisius College of Buffalo, NY Inc.</i></b></p>	<p>The college will receive important resources upon your passing to enhance and help provide a Canisius education for current and future students.</p>	<p>Opportunity to make a substantial or larger gift to Canisius.</p> <p>Ability to defer the gift until after your passing.</p> <p>Depending on your circumstances, the benefit of an estate tax deduction.</p>
<p><b>Retirement Account, IRA &amp; Donor-Advised Fund Succession</b></p>	<p>Contact your plan administrator to designate Canisius College as:</p> <ul style="list-style-type: none"> <li>• All or part beneficiary of your retirement account (IRA, 401(k), 403(b), etc.)</li> <li>• In the succession plan for your Donor-Advised Fund</li> </ul>	<p>Canisius and our students will benefit from your foresight and generosity.</p>	<p>Simple and straightforward way to make an estate gift to Canisius.</p> <p>If properly structured, reduced overall income tax consequences to your heirs.</p> <p>Your wishes for your Donor-Advised Fund will be fulfilled.</p>

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<p><b>Insurance Policy</b></p>	<p>Contact your insurance carrier to:</p> <ul style="list-style-type: none"> <li>• Name “The Canisius College of Buffalo, NY Inc.” as a beneficiary of all or part of the proceeds of an existing policy</li> <li>• Transfer ownership of a fully paid, existing policy to Canisius College</li> <li>• Make Canisius the owner and beneficiary of a new or existing policy</li> </ul>	<p>In the case of a beneficiary designation, Canisius receives the net proceeds payable under the policy upon your passing.</p> <p>In the case of a policy transfer, Canisius receives the policy’s current cash surrender value.</p>	<p>Provides an opportunity to make a substantial gift to Canisius at current manageable costs.</p> <p>An income tax deduction for the value of the policy when transferred, and for any subsequent premium payments made by you.</p>
<p><b>Bank &amp; Investment Accounts</b></p>	<p>Designate gifts from your bank or investment account to Canisius College.</p> <ul style="list-style-type: none"> <li>• Establish a Pay on Death (POD) for a bank account or for a Certificate of Deposit (CD)</li> <li>• Establish a Transfer of Death (TOD) provision for an investment account</li> </ul> <p><i>Ask your bank manager, financial advisor or attorney for assistance in documenting your wishes.</i></p>	<p>At your passing, the college receives the designated assets quickly, as there is no need for a probate proceeding to accomplish the transfer.</p>	<p>Provides an easy way to make an estate gift to Canisius while still retaining full ownership of the assets during your lifetime.</p>
<p><b>Charitable Trusts</b></p>	<p>If you will be subject to estate and inheritance taxes, discuss with your attorney or financial advisor the benefits of establishing a Charitable Lead Trust or a Charitable Remainder Trust.</p>	<p>Effective tax planning may allow you to provide a larger gift to Canisius College.</p>	<p>Provides an opportunity to retain a benefit for yourself or provide a benefit to your loved ones, in addition to your gift to Canisius.</p>