

Dartmouth College Gift Planning

The Bartlett Tower Society: Celebrating the foresight and generosity of those who have included Dartmouth College in their long-term financial plans.

Menu of Gift Planning Opportunities

	Gift Planning Options as a Bequest	Features	
1	Retirement Account	<ul style="list-style-type: none"> ✓ No minimum; leave a percentage or specific dollar amount ✓ Easy to do; can often be done online in a matter of minutes ✓ Maintain the ability to alter your gift, should your circumstances change ✓ Benefit a specific program, create a permanent endowment, or support the highest priorities at the time ✓ Assets are removed from estate for federal estate tax purposes ✓ Name <i>Trustees of Dartmouth College</i> as a primary beneficiary 	
2	Life Insurance Policy		
3	Will		
	Life Income Plans*	Specific to the Plan	Common Features
4	Charitable Gift Annuity	<ul style="list-style-type: none"> ✓ Fixed stream of income ✓ \$10,000 minimum gift ✓ Payout rates based on age 	<ul style="list-style-type: none"> ✓ Create an income stream for life for yourself and/or a loved one ✓ Fund with cash or appreciated securities ✓ Charitable income tax deduction in year of gift ✓ Provide support for Dartmouth after your lifetime ✓ Assets are removed from estate for federal estate tax purposes <p><small>* Often considered of particular benefit to those 65+ years of age or above. **Fund with cash, appreciated securities, real estate and/or tangible personal property (i.e. art, jewelry, collectables, etc.)</small></p>
5	Charitable Remainder Unitrust	<ul style="list-style-type: none"> ✓ Variable stream of income ✓ \$50,000 minimum gift** ✓ Payout rates range from 5-7% 	
6	Pooled Income Fund	<ul style="list-style-type: none"> ✓ Variable stream of income ✓ \$10,000 minimum gift ✓ Pays out income earned 	
	More Gift Planning Options	Features	
7	Dartmouth Donor Advised Fund - a philanthropic checking account	<ul style="list-style-type: none"> ✓ Simplify management of your charitable giving ✓ No fee, invested in the total return pool of the endowment with a \$250,000 minimum gift ✓ Support Dartmouth and other 501(c)(3) charities ✓ Charitable income tax deduction in year of gift ✓ Assets are removed from your estate for federal estate tax purposes 	
8	Charitable Lead Trust - support Dartmouth now and your family later	<ul style="list-style-type: none"> ✓ Dartmouth receives annual payments for a term of years ✓ After the term of years, assets are transferred, tax free, to heirs 	

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		<ul style="list-style-type: none"> ✓ Assets are removed from your estate for federal estate tax purposes
9	Retained Life Estate - give Dartmouth your home, but live in it for life	<ul style="list-style-type: none"> ✓ Transfer your residence to Dartmouth ✓ Continue living in your home, rent free, for life ✓ Dartmouth assumes ownership of your property after your lifetime ✓ Charitable income tax deduction in year of real estate transfer ✓ Real estate is removed from your estate for federal estate tax purposes

Why join the Bartlett Tower Society?

- It is one of the most personal ways to express your support for Dartmouth.
- To ensure that future generations of Dartmouth students have the same educational opportunities that you had.
- To leave a lasting legacy to Dartmouth.
- To provide for your family first, while also supporting the College.
- To acquire various tax advantages.

Bartlett Tower Society Membership Benefits

- Invitations to exclusive receptions.
- Annual listing in Dartmouth Alumni Magazine.
- Respect among peers.
- Gratitude in perpetuity.

For a personal, confidential, and non-binding consultation, please contact the Gift Planning Staff:

Executive Director Susan Hanifin, JD – 20 years of experience
 Associate Director Heather Ermarth – 7 years of experience
 Assistant Director Margo LaHaye – 40 years of experience

Senior Associate Director Tara Goodman, JD – 15 years of experience
 Life Income Plan Manager Darius Long – 3 years of experience
 Gift Chair Volunteer Program Mgr. Shari Boraz – 10 years of experience

Dartmouth Gift Planning Office - (800) 451-4067 - gift.planning@dartmouth.edu - www.dartgo.org/GiftPlanning