UAF Legacy Society

The Legacy Society recognizes donors who have made provisions to include the University of Alaska Fairbanks in their estate plans.

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(+) indicates deceased
(*) indicates alumni

UAF is an AA/EO employer and educational institution. UAF photo by Todd Paris. Updated as of 9/13/2016
Planned gifts help you accomplish your philanthropic goals while making a significant and lasting legacy at UAF. Your gift can play a key role in UAF’s future and can impact all aspects of the university, from student scholarships to programs and projects.

**About Planned Giving** Anyone can make a planned gift, and in many cases there is no minimum amount. Some gifts may require legal documents drafted by an attorney, while others can be done by the donor. Planned gifts should be part of an overall estate plan. The following are brief descriptions of some options for planned giving opportunities. Donors are encouraged to always seek legal advice when making their estate plans.

**Bequests**

Perhaps the easiest deferred gift to make is through a will or living trust, written such that upon the donor’s death, a gift is made from the trust or estate to the university. A simple sentence or two added to an existing will or trust can serve to make the bequest. In addition, the donor may change the bequest at any time by changing the wording in the will or trust. Specific bequests restricted to support a single campus or program are also possible.

The wording in a will or trust for a bequest to benefit the university can be simply: “I hereby leave to the University of Alaska Foundation, a 501(c)(3) nonprofit corporation located at 910 Yukon Drive Suite 206, Fairbanks, Alaska 99775-5080, the sum of $_____ to be used to support the general purposes of the University of Alaska Fairbanks.”

**Planned Gifts that Provide Income to Donors**

- **Charitable Gift Annuity** — The simplest and easiest of such gifts to make, a lump sum is provided to the UA Foundation and the foundation in return makes payments in set amounts to the annuitant for a term of years or for life. A simple contract is all that is needed to create such a gift.

- **Charitable Remainder Trust** — The donor establishes a formal trust that provides income payments to the donor for life. Upon death, the amount remaining in the trust is distributed to the university.

**Other Planned Gifts**

- **Homes or Personal Residences** — Individuals can donate homes or personal residences to the university and retain the right to continue living in the facility until their death. The donor pays all the expenses of owning the property (taxes, maintenance, etc.) but receives a charitable tax deduction in the year the gift is made.

- **Charitable Lead Trust** — The donor establishes a formal trust that provides income to the university during the donor’s lifetime (or term of years). Upon death, the trust is distributed to heirs free of estate tax. Donors with the potential of high estate tax liabilities may be interested in this type of trust.

**Insurance and Retirement Plans**

Insurance policies and retirement plans allow you to name one or more beneficiaries to receive the assets upon your death. A life insurance policy may also be given outright as a gift to the university.

“We’re inspired to give because we know there are people today with limited means that we can help, and can have an opportunity like we did.”

— Helga and Bill Watterson, alumni and Legacy Society members

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If you or your advisors would like more information on planned giving opportunities at the University of Alaska Fairbanks, contact:

UAF Development and Alumni Relations
P.O. Box 757530, Fairbanks, AK 99775-7530
(907) 474-2619 • www.uaf.edu/giving/

"When you give to UAF, your donation makes the difference between a basic college education and an extraordinary one. By investing in our students, you achieve something meaningful and lasting.”

— Brian Rogers, UAF Chancellor Emeritus, and Legacy Society member