



FOR THE
GREATER GREAT
—
THE VILLANOVA CAMPAIGN TO
IGNITE CHANGE

PLANNED GIVING
CHARITABLE REMAINDER TRUSTS



HOW WILL YOU CREATE YOUR LEGACY AT VILLANOVA?

It may be easier than you think.

CHARITABLE REMAINDER TRUSTS

Creating a charitable remainder trust is a great way to make a gift to Villanova University, receive fixed payments, and defer or eliminate capital gains tax. It provides a steady cash flow and can be more beneficial for you as the donor than keeping an asset or selling it outright.

In a charitable remainder trust, you would transfer assets to Villanova. The University, as trustee, then provides you with regular payments. Once the agreed upon term of the trust is over, Villanova receives what is left—the “charitable remainder”—of the trust assets. Charitable remainder trusts fall into two major categories, each with particular advantages and benefits to you based on your particular financial and philanthropic objectives. A charitable remainder unitrust (CRUT) offers payments that vary according to investment performance from year to year. A charitable remainder annuity trust (CRAT) offers fixed payments based on initial trust value.

CHARITABLE REMAINDER UNITRUST (CRUT)

A charitable remainder unitrust is a separately invested and managed charitable trust that pays a percentage of its principal, re-valued annually, to you and/or other income beneficiaries you name for life or a term of years (up to a maximum of 20). You receive a charitable income tax deduction for a portion of the value of the assets you place in the trust. The deduction can be spread out over six consecutive years. After the unitrust terminates, the balance or “remainder interest” comes to Villanova to be used as you designated when you established the unitrust.

You can use almost any asset to fund a unitrust, including cash, publicly traded stocks and bonds, closely held stock, partnership interests and real estate. You can tailor your unitrust to meet many financial or estate planning goals. You can choose to receive income beginning immediately or you can structure the trust and its investments to defer most of your income to a future time.

Benefits of a Charitable Remainder Unitrust

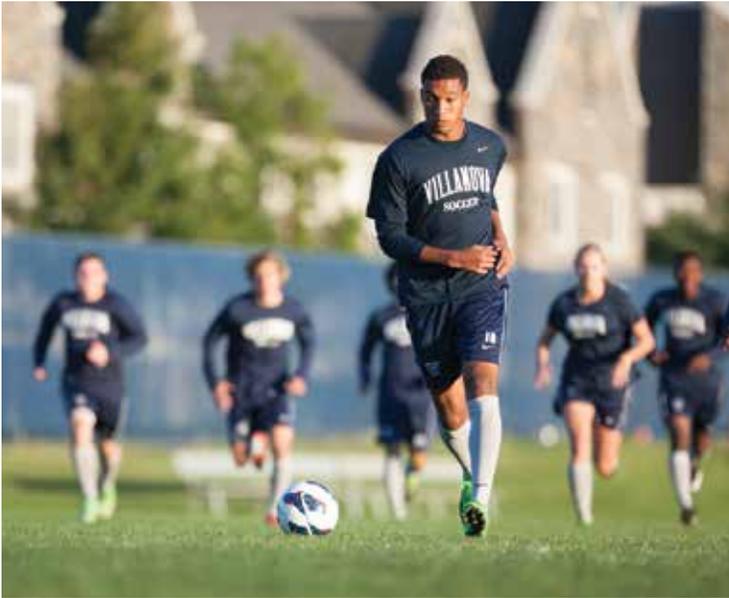
- Satisfaction of knowing your gift will help generations of future Villanovans
- Receive a charitable income tax deduction for a portion of your gift
- Avoid all upfront capital gains tax on any appreciated assets you transfer to the unitrust
- Reduce management headaches and estate tax liability by removing a large taxable asset from your estate
- Flexibility of adding additional assets to the trust at future dates
- Assets can be managed through a trustee relationship with Villanova or through your own investment advisors
- Membership in Villanova’s 1842 Heritage Society



The 1842 Heritage Society honors individuals who pledge to support the University through estate gifts, life-income gifts or the transfer of assets. Members enjoy special recognition events and communications from the University President.

CHARITABLE REMAINDER ANNUITY TRUST (CRAT)

A charitable remainder annuity trust is a separately invested and managed charitable trust that pays you, and/or other beneficiaries, a fixed annuity for your lifetime or for a term of years (up to a maximum of 20). You receive a charitable income tax deduction for a portion of the value of the assets you place in the trust. The deduction can be spread out over a six year period. By law, no additional gifts to the trust are permitted once the trust is initially funded. After the annuity trust terminates, the balance or “remainder interest” comes to Villanova to be used as you designated when you established the trust.



Benefits of a Charitable Remainder Annuity Trust

- Satisfaction of knowing your gift will help generations of future Villanovans
- Receive stable, predictable income equal to no less than 5% of the original gift
- Receive income that may be taxed favorably
- Avoid all upfront capital gains tax on any appreciated assets you contribute to the annuity trust
- Reduce your estate tax liability
- Retain the same tax-free opportunities as enjoyed with tax-free bonds
- Membership in Villanova’s 1842 Heritage Society

GUIDELINES FOR CHARITABLE REMAINDER TRUSTS

- Minimum amount to open a charitable remainder trust with Villanova is \$100,000
- You must be at least 50 years old
- A charitable remainder trust can be funded with cash, securities, or property
- You determine the beneficiary or beneficiaries who receive the payments
- You may designate multiple individuals to be the beneficiaries
- Payments may be received over a lifetime or a period of years (up to 20 years)

ONLINE RESOURCES

The Office of Planned Giving has a number of tools available online to help you consider your gift options, as well as information on estate planning and taxes. Find these and more at www.villanova.edu/plannedgiving.



“It’s really a win-win situation for us. The trust is managed exactly the way I would have managed [the funds] without a charitable trust.”

– Thomas '69 BS, '71 MA, EdD,
and Diane '82 MS Treacy
Members, 1842 Heritage Society

CONTACT

The Office of Planned Giving is happy to help you explore if a charitable remainder trust is the best option for you and, if so, which kind of trust works best to meet your financial planning and philanthropic goals at Villanova.

www.villanova.edu/plannedgiving

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Villanova's Legal Name:
Villanova University in
The State of Pennsylvania

Villanova's Federal Tax ID#:
23-1352688

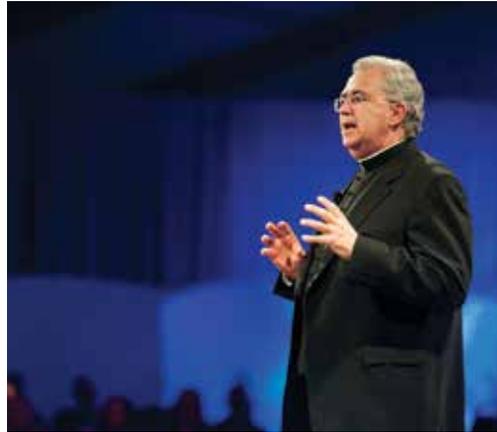


VILLANOVA
UNIVERSITY

WORKING WITH YOUR ADVISORS

We understand that financial, philanthropic and estate goals are unique to each individual. For this reason, we encourage prospective donors to consult with their professional legal and tax advisors before making the decision to establish a charitable remainder trust.

We welcome the opportunity to assist your advisors as they incorporate your philanthropic objectives into well-crafted estate plans.



Rev. Peter M. Donohue, OSA, University President

FOR THE GREATER GREAT
THE VILLANOVA CAMPAIGN TO
IGNITE CHANGE

In October 2013, Villanova University embarked on a historic comprehensive capital campaign to raise \$600 million that will expand the University's national reputation and ensure that Villanova offers a premier academic and learning environment for decades to come.

Planned gifts comprise a significant portion of funds raised for the campaign, and they are essential to fulfilling our campaign goals. Your charitable remainder trust can directly contribute to the greater great—leaving a legacy for future generations.

More information about The Villanova Campaign to Ignite Change can be found at www.forthegreatergreat.com.

LET US THANK YOU

If you have included Villanova in your estate plans, please let someone in our Office of Planned Giving know. We would like to thank you for your generosity and faithfulness. We would also like to ensure that the purpose of your gift is clearly understood by the University and we would like to welcome you as a member of the 1842 Heritage Society.

