The University of Akron
Foundation

Center for Gift and Estate Planning

A Quick-Reference Guide for Professional Advisors

Charitable gifts are important aspects of many estate plans, and a wonderful way to create lasting legacies. You are an important partner in this process.

When including a gift to the UA Foundation in your client's estate plans, please direct it to:

The University of Akron Foundation, Akron, Ohio, 44325-2603
(Federal Tax ID: 34-6575496), designated in support of __________ (if applicable).

What planned giving vehicle best meets your client's philanthropic objectives?

Consider:

- Bequest in a Will or Trust
- Beneficiary Designation (IRA or other retirement plan, life insurance policy, etc.)
- IRA Rollover
- Payable on Death / Transfer on Death Accounts
- Charitable Gift Annuity
- Charitable Remainder Trust
- Charitable Lead Trust
- Retained Life Estate

Encourage clients to share their future gift with The University of Akron Foundation:

The UA Foundation requests that donors complete non-binding bequest/beneficiary designation statements of intent and share the relevant portions of their estate planning documents.

The UA Foundation would like to:

- Thank your clients!
- Welcome them to the 1870 Society, UA's planned giving society.
- Ensure their intent is properly understood now, so that there is no question as to where the funds are to be directed when they are ultimately received. Gifts may be unrestricted, designated to a particular unit on campus, or directed to a new or existing endowment.

1870 EIGHTEEN SEVENTY — GIVING SOCIETY

Visit the Center for Gift and Estate Planning website for additional resources: www.legacygiftplanning.uakron.edu (Tools and Resources – For Professional Advisors)

- Planned Giving Brochure – A resource for donors considering planned giving vehicles
- IRA Rollover – Custodian transfer form to facilitate qualified charitable distributions (QCD) to the UA Foundation
- Wire Transfer Instructions – Necessary information for facilitating gifts via wire transfer

Questions?

Lia Jones, Esq. | Director, Center for Gift and Estate Planning
The University of Akron Foundation

InfoCision Stadium | Akron, Ohio 44325-2603
O: 330-972-2819 | C: 330-607-4964 | E: LiaJones@uakron.edu