

Gift
Planning
At
Any Age

Duke UNIVERSITY

Gift Planning At Any Age

With gift planning, everyone wins.
Play a strategic hand, no matter your age.

20s
and
30s

You have just begun your career or started a family. Planned gifts can allow you to designate future support without interfering with current cash flow.

career



RETIREMENT ACCOUNT

Name Duke to receive a portion of your retirement account after you have passed away. You may specify a dollar amount or a percentage of the account.

BEQUESTS

Including Duke in your estate plan can be a simple way to provide future support. This non-binding gift can be changed, depending on your needs, and it doesn't impact your current finances.

family

marriage

40s
and
50s

You may have an established career and are saving for anticipated expenses such as college tuition, care of parents, and your retirement. Build planned gifts into your long-term plans as part of the solution. You may also have a portfolio of investments that have appreciated—which are great to use for charitable gifts!

children



Discover how a planned gift to Duke can leave a lasting legacy for the university you love while also achieving your personal and financial goals. There are multiple options for every life stage.

CHARITABLE REMAINDER UNITRUSTS

Convert appreciated, low-yielding assets like stock or real estate into a diversified portfolio that provides income to you or loved ones while providing future support to Duke.



60s
and
70s

In planning your retirement you are considering how to provide the income you need each year while reducing taxes. Supporting organizations you value—like Duke!—can help you solve this puzzle.

asset
management

GIFTS OF REAL ESTATE

Donating property such as a vacation home or investment real estate may allow you to claim a charitable tax deduction and avoid capital gains taxes on any appreciation.

retirement

DEFERRED GIFT ANNUITIES

You're creating a gift that will pay you back when you need it—such as during retirement. You can take a larger income tax deduction now—and increase future payments—by deferring those payments until a later date.



care of
parents

80s
and
90s

You are concerned about having a steady stream of income each year regardless of what happens in the market. You can also use an income tax deduction.



college
tuition

legacy
planning

CHARITABLE GIFT ANNUITIES

By donating cash or stock, you can receive a fixed payment from Duke for the rest of your lifetime. After you've passed away, the remainder of your gift will be used to support purposes you care about at Duke.

GIFTS OF SECURITIES

Donating appreciated stocks, bonds, or mutual funds that you've held for more than one year can provide special tax advantages and have an immediate impact at Duke.



Contact the Duke University
Office of Gift Planning to learn more.

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