Planned Giving to Stanford GSB

When you make a planned gift to Stanford GSB, your legacy helps ensure the school’s long-term future.

By providing for the GSB in your will, trust, retirement account, or other deferred giving plans, you make an uncommon commitment that endures beyond your lifetime.

Why Make a Planned Gift?

A well-planned gift sustains your generosity after your lifetime and makes a powerful statement about the legacy you wish to leave. It can also provide a tax-efficient investment in your future and the future of the GSB.

You can choose options that cost nothing now, but will sustain and strengthen the school in years to come, like the fellowship described here.

You can also choose options that pay you income for life and leave a lasting legacy for the GSB.

Although planned gifts of any size are welcome, gifts from estates often help donors make their most significant and lasting commitment to the school.

“Even to this day, pursuing the Stanford MBA has opened more doors than I could have ever imagined. It has been one of the most significant events shaping my personal and professional life. It is for this reason that I set up my estate plan naming the GSB as one of the primary beneficiaries, with the gift to be used for fellowship purposes to help support a future MBA student.”

— Sharon Wong, MBA ’85, made a bequest

Planned Giving Achieves Financial Goals

A planned gift can be an effective way to achieve your financial and estate planning goals while supporting the GSB into the future.

Typically offering the opportunity to save on income or estate taxes, many planned giving arrangements generate significant charitable tax deductions when the gift is made. Thoughtful gift planning also can help eliminate, reduce, or defer capital gains taxes for gifts made with appreciated assets, such as real estate or securities.

With some planned giving vehicles, you can reap the benefits of having your assets managed by Stanford University’s investment experts, enabling you to benefit from access to a range of investment opportunities not generally available to the public.

“I’m lucky to have had enough to take care of myself, my wife, and my kids. Now, with what I have left, I want to take care of my extended family, the GSB, a place that gave me a foundation for a wonderful career and lifelong friends.”

— Bob Gee, MBA ’61, established a charitable remainder trust
Options for Creating an Enduring GSB Legacy

There are many ways to include charitable giving in your estate plans, for an amount and purpose that you choose:

**Bequests:** A flexible and popular way to leave a legacy is to create a bequest through your will or revocable trust. Bequests can be for any amount and can include cash, securities, real estate, other property, a percentage of the residual, or all of an estate. A bequest costs nothing now and enables you to contribute to the GSB’s excellence far into the future.

**IRAs:** Retirement plans can be subject to both estate taxes and income taxes when distributed. However, if Stanford GSB is named as the complete or partial beneficiary of your plan, income or estate taxes on the distribution are avoided on the amounts distributed to the GSB and the GSB benefits from the full value of your legacy gift.

**Life income gifts:** A charitable remainder trust, charitable gift annuity, or other life income gift is a great way to leave a legacy at the school while also taking care of yourself or loved ones in your lifetime. These plans offer payments to you or other individual beneficiaries you name and will benefit Stanford GSB in the future. You may also be entitled to tax benefits, such as an income tax deduction and savings on capital gains tax.

Stanford offers other gift arrangements as well, including charitable lead trusts that provide payments to Stanford GSB for a term of years and then distribute the remaining assets to your children or other beneficiaries, with low or no estate taxes.

**You Determine the Impact**

Your planned gift can be either unrestricted, allowing the school to seize opportunities or meet unforeseen needs, or restricted to support only a particular area that is meaningful to you.

In addition, your planned gift can provide the GSB with resources that can support current needs upon receipt or — by meeting a minimum gift level — be endowed, and leave a legacy in perpetuity.

**Planned Giving and Your Reunion**

Those who make or notify the GSB of a planned gift in their reunion year receive added recognition in the school’s Reunion Report. All planned gifts count toward class participation totals and those that are irrevocable and can be assigned a present value, such as life income gifts, can be included in class dollar totals. The GSB is particularly grateful to those who support the school with an outright gift or pledge along with their planned gift in honor of their reunions.

Let Us Thank You

When you make a planned gift of any amount, or if you have already provided for the school in your estate plans, please let us know so we can thank you and recognize you, either by name or anonymously if you prefer.

Those who have made such plans for the business school are honored as GSB Legacy Partners. GSB Legacy Partners is affiliated with the university's Founding Grant Society, which recognizes planned gifts to any part of the university. Those honored as GSB Legacy Partners will also be recognized as members of the Founding Grant Society.

Notify Us of Your Plans

For more information on how you can contribute to the GSB’s future through a planned gift, contact the GSB Development Office at 650.723.3356.