Making a Planned Gift
to the Stanford Graduate School of Business

When you make a planned gift for the Stanford Graduate School of Business (GSB), you are not only creating a legacy for the well-being of a world-class management education institution at a great university, but also contributing to the greater good of our world.

LEAVING A LEGACY

Planned giving provides a way for a donor to make an act of faith in the GSB and its future — one that makes a lasting impact on the GSB for generations to come. The school has come a long way since it opened in 1925 in borrowed space in Stanford University’s main quad. In 2011 it moved to its new home in the Knight Management Center, a cutting-edge, environmentally sustainable facility that encourages and enables innovative thinking and multidisciplinary collaboration. Making a planned gift can help ensure the GSB has the resources to continue to produce effective, principled leaders and leading business ideas through teaching and research.

PLANNED GIVING ACHIEVES FINANCIAL GOALS

A planned gift can be a creative tool to achieve financial and estate planning goals while supporting the GSB in a significant way. With some planned giving vehicles, including life income gifts, donors can reap the benefits of having their assets managed by Stanford University’s investment experts, enabling them to benefit from access to a range of investment opportunities not generally available to the public. Planned giving donors can have confidence that the GSB and Stanford as a whole will honor the gift, invest it wisely, and use it as it was intended.
A planned gift can be either unrestricted, allowing the school to seize opportunities or meet unforeseen needs as they arise, or be restricted, offering a way for a donor to support an educational program of their choice or an area in which they are particularly interested. In addition, a planned gift can be either expendable, providing immediate resources, or — by meeting a minimum gift level — endowed, and provide permanent support.

Remember, a donor of a planned gift can always change his/her mind. Circumstances, goals, and sentiments can change over time, and donors can always change their plans accordingly. There are many ways to include charitable giving in your estate plans, at an amount and for a purpose of the donor’s choosing. Vehicles for making planned gifts are:

**Bequests:** Making a gift to the GSB from an estate can be accomplished by a simple amendment to a will, or a revocable trust in consultation with an attorney and the Office of Planned Giving at Stanford. Bequests can include cash, securities, real estate, other property, a percentage of the residual or all of an estate.

**Annuity Trusts:** Separately managed, tax-exempt trusts that provide a fixed annual payment to the donor for life.

**Unitrusts:** Separately managed, tax-exempt trusts that provide a varying annual payment based on a specified percentage, usually between 5% to 7% of the value of the trust assets measured annually.

**IRAs:** Most retirement plans are subject to income taxes if left to an individual beneficiary; however, a charity that is named as the beneficiary does not pay income or estate taxes on the distribution, which means that the full value of what is distributed can be used by Stanford as a gift from your estate.

**Gift Annuities:** Contract by which Stanford pays a guaranteed fixed payment for life in exchange for gift assets.

**FOUNDED GRANT SOCIETY**

The Founding Grant Society is open to all who provide support for Stanford in their estate plans through wills, trusts, life income gifts, retirement plans, life insurance designations, and other vehicles. Nearly 2,700 alumni and friends of the university are current members, and that figure is growing as more people inform Stanford of their bequest intentions. Membership involves no dues or obligations of any kind. From time to time, the university holds special events for Founding Grant Society members. Guest speakers include Stanford faculty, alumni, and friends.

According to its charter, the society “is intended to convey to those whom it honors that in so acting, the Stanfords’ university also becomes their university, and that each individual act of support reaffirms the Stanfords’ promise to children of the future… that it will be better, that they are needed to make it better, and that a legacy of education will serve them more than any other.”

**CONTACT US**

Knowing how fondly you remember your time at the Stanford Graduate School of Business, please consider the possibility of remembering the school in your estate plans. For more information on how you can contribute to the GSB’s future through a planned gift, contact the development office at 650.723.3356.