

CHARITABLE REMAINDER TRUSTS

INVEST IN THE FUTURE



Create trust agreement and transfer assets to trustee



Remainder to Columbia for the purpose you specify



Trustee makes payments to income beneficiaries



Make Your Gift
Fund a CRT with a gift worth at least \$100,000 in cash, securities, or other approved assets, or worth at least \$500,000 in real estate, and receive an immediate income tax deduction for a portion of your gift. Avoid capital gains tax on any appreciated assets donated to the CRT.

Income to Beneficiaries
The trustee invests and manages the trust assets and makes income payments to you or your designated recipient(s). Trust assets may be invested alongside Columbia's robust endowment.

Benefits to Columbia

At the death of the last income beneficiary, the trust remainder goes to Columbia Business School for purposes you designate.

Interested in learning more about making a planned gift?
Contact Zachary Howell, Assistant Dean, at 212-851-4301 or zh2134@gsb.columbia.edu.

Columbia University welcomes alumni and friends into its 1754 Society, an honorary society for those who have made planned gifts to Columbia. On behalf of all past, present, and future Columbians, thank you for your enduring commitment.
Please tell us more about your planned gift below.

- I have provided support for Columbia Business School in my will or via other planned gift.

NAME

SCHOOL / CLASS

DATE OF BIRTH

ADDRESS

CITY / STATE / ZIP

PHONE

EMAIL

PLEASE CHECK ONE:

- Columbia may include my name in 1754 Society member listings.

Please list my name as:

- I prefer to remain anonymous.

OPTIONAL INFORMATION:

Please tell us more about your gift to Columbia.

I have named Columbia Business School a beneficiary in my:

- Will or living trust
 Charitable trust
 IRA or other retirement plan
 Life insurance policy
 Other (please specify):

My gift is:

- Unrestricted
 Designated for _____

Estimated current value: _____

SIGNATURE

DATE

This information will be kept confidential and is not binding on you or your estate.

PLEASE RETURN COMPLETED FORMS TO:

Columbia Business School
Office of External Relations and Development
33 West 60th Street, 7th Floor, New York, NY 10023