

# BENEFICIARY DESIGNATION

## PLAN FOR THE FUTURE



Contact your policy or plan administrator to name Columbia Business School as a beneficiary



Asset transferred to Columbia when realized



Provide a copy of the beneficiary designation documentation to the School



### Make Your Gift

Name Columbia Business School as a beneficiary for all or part of your life insurance policy, retirement fund, annuity, bank account, CD, or other asset and provide the corresponding documentation to the School.



### Savings for Your Estate

These assets may have significant value, which can be severely diminished for heirs by estate and/or income tax. If you name Columbia as the primary or co-beneficiary of an asset, your estate will receive a charitable estate tax deduction.

### Benefits to You and Columbia

You will become a member of the 1754 Society, an honorary society for those who have made planned gifts to Columbia. After your death or the death of the primary beneficiary, the funds will be transferred to Columbia and applied to the purpose 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](mailto: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