# **SMART GIVING**

## **MAXIMIZE YOUR ASSETS**

Stocks Mutual Fund Shares Real Estate Bonds Life Insurance

### **Donate Directly**

Donating long-term appreciated assets directly to Columbia Business School has more impact than donating the cash proceeds from selling those assets.



#### **Tax Advantage**

Your gift may reduce or eliminate taxes on your donated asset. For example, by donating appreciated securities directly, you can avoid capital gains tax on the amount of appreciation.

To find out more about the tax advantages of giving to Columbia Business School, please consult your financial advisor.

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. | <b>OPTIONAL INFORMATION:</b> Please tell us more about your gift to Columbia.     |
|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| NAME                                                                                         | I have named Columbia Business School a beneficiary in my: ☐ Will or living trust |
| SCHOOL / CLASS                                                                               | ☐ Charitable trust☐ IRA or other retirement plan                                  |
| DATE OF BIRTH                                                                                | ☐ Life insurance policy☐ Other (please specify):                                  |
| ADDRESS                                                                                      | My gift is: ☐ Unrestricted                                                        |
| CITY / STATE / ZIP                                                                           | ☐ Designated for                                                                  |
| PHONE                                                                                        |                                                                                   |
| EMAIL                                                                                        | Estimated current value:                                                          |
| PLEASE CHECK ONE:  ☐ Columbia may include my name in 1754                                    |                                                                                   |
| Society member listings.                                                                     | SIGNATURE DATE                                                                    |
| Please list my name as:                                                                      | This information will be kept confidential and is not                             |
| ☐ I prefer to remain anonymous.                                                              | 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