



# Gifts by Beneficiary Designation

## MAKE A FUTURE GIFT TO THE UNIVERSITY IN FOUR SIMPLE STEPS

A popular and easy way to accomplish a generous planned gift is by naming the University of Rochester as a revocable beneficiary of **retirement assets, investment and bank accounts, life insurance, certificates of deposit, and other assets** that are ultimately distributed by beneficiary designation (commonly known as payable on death (POD) or transfer on death (TOD)). These gifts pass directly to the University free of income tax or estate tax.

- 1 Contact your account manager and ask to review your **beneficiary designations**.
- 2 On the form, indicate the percentage of the remainder of your account that you, or you and your spouse, wish to direct to the University.  
  
University of Rochester  
Office of Trusts, Estates & Gift Planning  
Box 278799  
Rochester, NY 14627-8799  
  
FEDERAL TAX ID# 16-0743209  
  
Phone: 585-275-8894
- 3 Return the completed form to your account manager and inform the University of Rochester of your gift.
- 4 Share a copy with your estate attorney or advisor.

**DESIGNATING YOUR GIFT** Unlike gifts governed by a Last Will and Testament, that can direct funds to a specific purpose, commercial asset managers are not able to take responsibility to see that your future gift is designated for a particular fund, school, or unit. Therefore, we encourage donors who wish to direct their funds to establish a gift agreement with the University that will govern the use of the funds when received.

**THANK YOU** Your gift by beneficiary designation qualifies you for membership in the Wilson Society, which honors those who have included the University in their estate planning.

**PLEASE CONTACT US** If you need assistance, a draft gift agreement, more information, or wish to discuss a gift by beneficiary designation, please contact us at:

University of Rochester  
Office of Trusts, Estates & Gift Planning  
Box 278799 Rochester, NY 14627-8799

(800) MELIORA (800-635-4672)  
or 585-275-8894

giftplanning@rochester.edu  
www.rochester.giftplans.org



UNIVERSITY of ROCHESTER

IMAGINE YOUR LEGACY