



The Stanford Charitable Trust Program

A shared commitment to your philanthropic goals

Stanford
University

Stanford University has one of the largest charitable trust programs among all U.S. colleges and universities, with current assets under management of over \$700 million. The university has served as trustee of life income gifts for more than 75 years.

The Charitable Trust Program

STANFORD'S CHARITABLE TRUST PROGRAM MANAGES OVER 600 CHARITABLE remainder trusts, charitable lead trusts, charitable gift annuities, and pooled income funds. These gifts help support undergraduate scholarships, graduate fellowships, professorships, and many other programs at Stanford, ensuring the excellence of the university for future generations.



The Charitable Trust Program is part of the Office of Planned Giving in the Office of Development at Stanford University. The program partners with:

- Colleagues in Stanford's **Office of Planned Giving** for gift creation, technical expertise, and stewardship.
- **Stanford Management Company**, the division of the university that invests Stanford's endowment, for investment expertise and oversight of the charitable trust program assets.
- **TIAA Kaspick**, the premier provider of planned gift management services, for gift administration support and the investment of assets in the TIAA Kaspick portfolio allocations.

By choosing Stanford as trustee of your life income gift, you gain access to unique advantages that the university offers to its donors and income beneficiaries.

- **Low cost:** Significantly below-market trust administration charges.
- **Comprehensive administration:** Timely periodic payments, regular performance reporting, and annual preparation of tax forms including K-1s and 1099-Rs.
- **Skilled investment management:** A broad range of investment options with the goal of achieving long-term returns while managing risk. Charitable gift annuities and pooled income funds are invested in a portfolio that holds a diversified mix of public equity and fixed income asset classes. Charitable trusts may be invested in one of several TIAA Kaspick portfolio allocations specifically designed for charitable trusts or, if eligible, in the Endowment Return Objective, which is invested alongside Stanford's endowment.
- **Personal attention:** A dedicated team of professionals provide customized service and attention to your gift.

Investment Considerations for Charitable Trusts

STANFORD OFFERS FIVE INVESTMENT OPTIONS FOR CHARITABLE REMAINDER TRUSTS.

One is the Endowment Return Objective, and four are TIAA Kaspick portfolio allocations.



The Endowment Return Objective allows certain charitable trusts to be invested alongside Stanford's endowment. This option leverages Stanford Management Company's expertise and provides trusts access to a diversified global investment portfolio of public and private investments.

The TIAA Kaspick portfolio allocations are specifically designed for charitable trusts and are intended to produce more favorable after-tax outcomes for income beneficiaries. These allocations are invested in diversified global portfolios of varying equity and fixed-income mixes, and are implemented using an array of institutional-quality, low-cost mutual funds.



There are many factors to consider when selecting an investment option for your charitable trust. Before making a selection, Stanford will work closely with you to explore the following considerations:

- Payout rate of the trust
- Time horizon of the trust
- Income needs and tax considerations of the beneficiaries
- Your philanthropic goals
- Eligibility to invest in Stanford's Endowment Return Objective
- Any other unique circumstances

Please contact the Charitable Trust Program in the Office of Planned Giving to discuss each of these considerations in greater detail.

Take Care of Yourself, Take Care of Stanford

AFTER TAKING CARE OF YOURSELF AND THE ONES YOU LOVE, CONSIDER WHAT ELSE really matters to you. A life income gift can be a wonderful way to establish a source of income for you or your loved ones for life and provide a future gift to Stanford, creating a legacy that will support generations of outstanding students and faculty.



Contact Us

THE STAFF AT STANFORD'S OFFICE OF PLANNED GIVING WOULD BE HAPPY TO HELP you explore your life income gift options. For more information, please contact 650.725.4358 or planned.giving@stanford.edu. You may also visit our website, plannedgiving.stanford.edu.



For more information, please contact:

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