


# A Gift of Faith *and Foresight*





**“I’m so grateful to our donors for making my Creighton experience possible. I can’t imagine having picked any other college. I’d be an entirely different person.”**

**– EFREN GARCIA, BS’21**



## **FORWARDBLUE™**

**A Bold Future for Creighton University**

**Forward Blue**—the largest fundraising campaign in Creighton’s 143-year history—is a bold, new chapter in our story. Forward Blue ensures Creighton’s future and positions the University to prepare our students to confront the complex challenges of today.

Our Jesuit mission shapes our vision. But our one-of-a-kind community—you make it a reality. When you support Creighton’s mission, you create well-rounded women and men, ready to lead the way in pursuit of a better world. Together, we will face our future with the foresight, ingenuity and the courage that have come to define Creighton University.

Our dedicated Gift and Estate Planning team can help you support Creighton in a way that is most meaningful to you and beneficial to the University.



# CREIGHTON UNIVERSITY HERITAGE SOCIETY



Mary Lucretia  
Creighton



Edward  
Creighton



Sarah Emily  
Creighton



John  
Creighton

Creighton University would not exist without the far-reaching faith, vision and generosity of the founding Creighton family. In 1876, through her will, Mary Lucretia Creighton gave life to the dream of her late husband, Edward, to found a college.

“The said school shall be known as Creighton College and is designed by me as a memorial of my late husband. I have selected this mode of testifying to his virtues and my affection to his memory because such a work was one which he in his lifetime proposed himself.”

For more than 140 years, charitable bequests and other planned gifts have been essential to Creighton’s continued excellence.

The Heritage Society pays tribute to those who share our founders’ vision by including Creighton University in their estate plans. The Heritage Society recognizes commitments such as a bequest provision in your will, a gift of qualified retirement plan assets or a life-income gift naming Creighton as a remainder beneficiary.

**“We want to make the Creighton experience accessible for every deserving individual who will serve as an agent of change in their communities. College can have a profound impact on someone for the rest of their life. It absolutely happened for me.”**

**– MIKE, BSBA’78, JD’81,  
AND NANCY ZOELLNER**

**ZOELLNER FAMILY ENDOWED SCHOLARSHIP**







## *Legacy Planning:* **Options for Everyone**

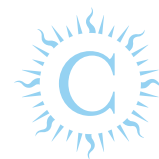
Following are additional ways you can join the Heritage Society and the benefits that come with them—for you and for Creighton.

### **PROVISION IN A WILL OR REVOCABLE TRUST**

To make a commitment to Creighton, ask your attorney to use the sample language on page 6 as a guide for your will or revocable living trust. Your pledge will provide a legacy for generations. If your will or trust has been prepared, adding a codicil or amendment will update your gift intention.

### **GIFTS THAT PAY YOU BACK**

Life-income gifts have many benefits: possible annual income for you and your family or others, current and future tax savings and support for Creighton University. Charitable gift annuities, charitable remainder trusts, charitable lead trusts and other vehicles can be tailored to meet your personal and philanthropic goals. Cash, long-term appreciated securities, corporate bonds, mutual funds or real estate can be put to work for you and the University.



**Your investment in Creighton University  
will pay dividends for years to come,  
transforming the lives, minds and spirits  
of our students.**

#### **QUALIFIED CHARITABLE DISTRIBUTION (QCD)**

If you are 70 ½ or older, you may instruct your IRA plan administrator to make a distribution of up to \$100,000 per person, per year, directly to Creighton University via check or electronic transfer. For those age 72 and older, QCDs count against your required minimum distribution (RMD), but are not included in your taxable income. Your contribution does not qualify for a charitable income tax deduction, but QCDs have proven for many to be a taxwise method to achieve their desired charitable impact at Creighton University.

#### **TESTAMENTARY GIFT OF RETIREMENT ASSETS**

Naming Creighton as a beneficiary is the first step to using your tax-deferred retirement account to impact the University. These assets often are the most tax-wise to contribute because they are subject first to estate taxes and then to income taxes as they are paid out to non-charitable beneficiaries. A written agreement with the University stating how the funds will benefit Creighton ensures your contribution is used in the manner you state. Contact your plan administrator to obtain the beneficiary designation form and the Office of Gift and Estate Planning for further details.

#### **LIFE INSURANCE**

You can contribute life insurance by (1) having Creighton University as a beneficiary through a Beneficiary Designation Form with your insurance company and (2) naming Creighton University as the new owner. This change in ownership may provide you with an immediate charitable income tax deduction, and you also may be able to deduct future insurance premium payments. As with tax-deferred retirement accounts, an agreement with the University stating how the funds will benefit Creighton will ensure that your contribution is utilized per your wishes.

#### **REAL ESTATE**

You can contribute your residence, vacation home or farm while retaining the right to occupy or use the property for your lifetime and receiving a current charitable income tax deduction. Creighton will receive full ownership of your property when your lifetime interest ends; or you may terminate your interest voluntarily. The proceeds from the sale of your property will benefit the University as you specify.

## PROPOSED LANGUAGE FOR A GIFT PROVISION IN A WILL OR REVOCABLE TRUST

You may provide for Creighton by making a new will, modifying your present will (by adding a codicil) or by including the University in your revocable trust.

You and your estate planner may find the following language helpful:

### **SPECIFIC AMOUNT**

I give and bequeath to Creighton University, a not-for-profit corporation located in Omaha, Nebraska, the sum of \$\_\_\_\_\_.

### **PERCENTAGE OF ESTATE**

I give and bequeath to Creighton University, a not-for-profit corporation located in Omaha, Nebraska, \_\_\_\_\_% of my gross estate as determined for estate tax purposes.

### **RESTRICTED ENDOWMENT**

I give and bequeath to Creighton University, a not-for-profit corporation located in Omaha, Nebraska, the sum of \$\_\_\_\_\_ to be used for establishing the Betty Smith Endowed Scholarship in the School of Law.

### **SPECIFIC PROPERTY**

I give and bequeath to Creighton University, a not-for-profit corporation located in Omaha, Nebraska, the following described real/personal property.

### **RESIDUAL BEQUEST**

I give and bequeath to Creighton University, a not-for-profit corporation located in Omaha, Nebraska, all the rest and residue of my estate.



**“Through the power of endowment, Creighton University continues to move forward with an unwavering commitment to a higher purpose and a greater good. We are grateful to the visionary donors who support our mission and help guide our academic future by making a deeply personal and distinctive endowed gift.”**

**– MARDELL WILSON, EdD**  
PROVOST





## *Realize Your* **Creighton Legacy**

Through charitable gift planning, you leave a lasting impact on Creighton. You can designate the University as a beneficiary in your will, trust, retirement plans or other arrangements that fulfill your philanthropic vision for the University, while having no current financial impact upon you. You can also provide a contribution of real estate, stocks, bonds, mutual funds or other assets. If you already have included a gift to Creighton through a bequest or other planned gift arrangement, please let us know so that we can thank you and record your intentions.

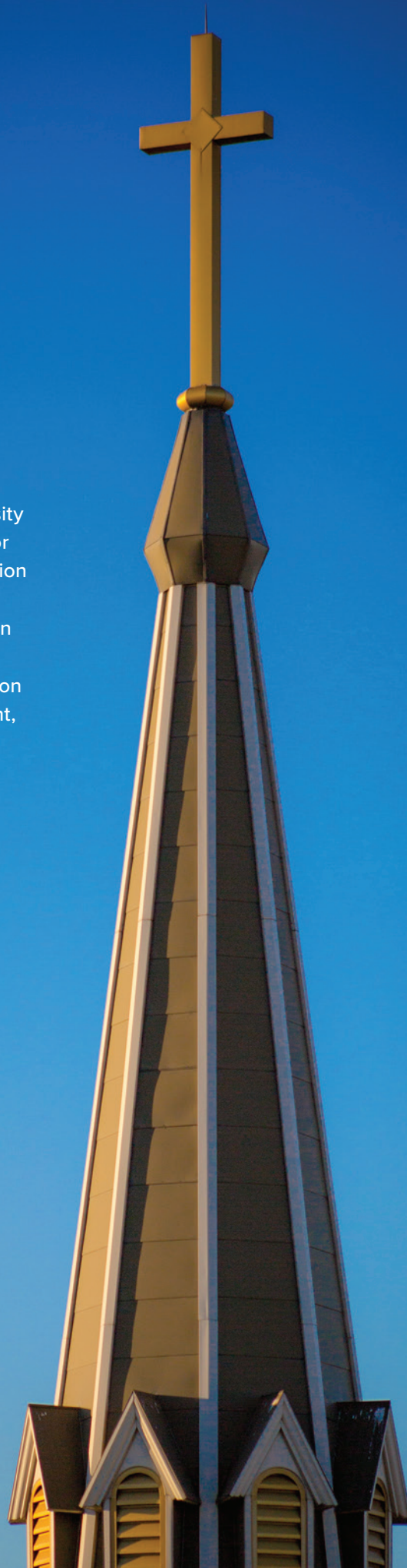
Our dedicated Gift and Estate Planning team is here to answer any questions you may have about charitable gift planning or maximizing your philanthropy with Creighton.

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### **CONTACT US FOR MORE INFORMATION:**

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UNIVERSITY

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