

# Support the College of Environmental Design and Benefit Financially



Prepared for  
Alumni &  
Friends of  
ENV



**CalPoly**  
Pomona

Want to support ENV  
but not sure how?  
Consider making gifts  
today and tomorrow  
using a combined gift  
strategy.

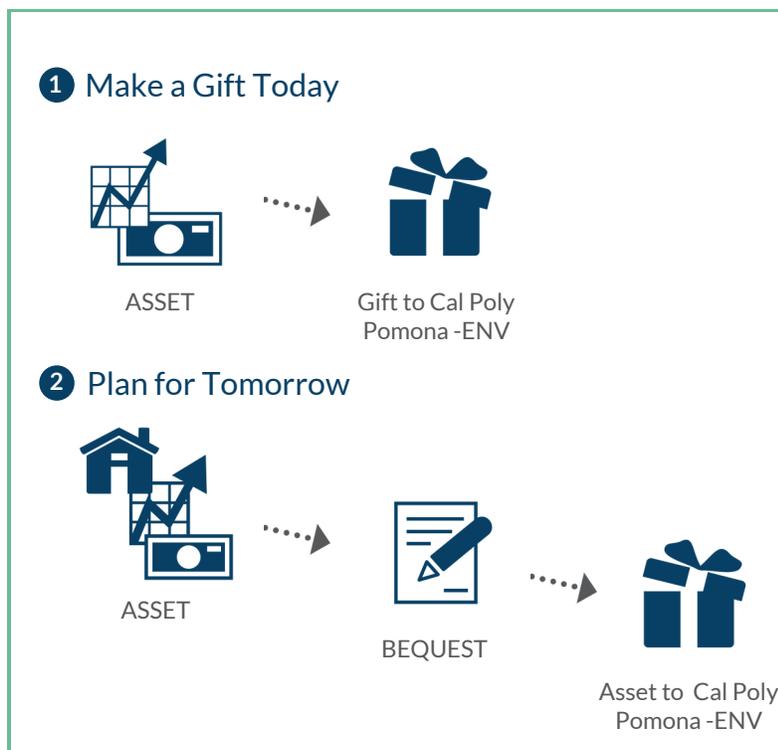
Quality learning experiences are critical in preparing Cal Poly Pomona ENV students for careers in all aspects of environmental design. As an interested partner you can support programs and scholarships today and far into the future.

The combination of a current gift and a charitable bequest made in your will or trust can help you achieve your goals while having impact on ENV programs now, and in perpetuity. You can provide for your family, establish a financial plan, support current needs and leave a legacy at Cal Poly Pomona.

## Giving Today and Giving Tomorrow can Maximize the Impact of your Gifts

Did you know that a combined gift can multiply the impact of your giving? By combining your current annual gifts with a gift in your will or estate plan, you can support today's program and student scholarship needs and permanently secure the future of the College of Environmental Design.

### How a Gift and Bequest Works



When you supplement your annual gifts with a bequest or other planned gift, you create a legacy for your family and Cal Poly Pomona, while also saving significant taxes for you and your family.

# Basic Benefits of a Gift and Bequest

	CURRENT GIFT	BEQUEST
Flexibility	Making a current gift, or series of current gifts, is flexible. You can support ENV students and make an annual gift based on what you can afford to give each year. You can increase your giving as your capacity to give grows.	A bequest is also very flexible - you can change your mind if your needs change. A bequest gives you continued use and control over whatever you decide to leave to Cal Poly Pomona in your will or trust. Bequests can also be made with a Beneficiary Designation from a life insurance policy or IRA account.
Personal Satisfaction	A current gift allows you to see firsthand the impact of your giving.	A bequest will enable you to leave a lasting legacy that continues to support our Environmental Design students even after you are gone.
Potential Tax Benefits	A current gift will allow you to take a charitable income tax deduction in the year of your contribution, which can reduce your income taxes. If you give an appreciated asset, such as stock, you can also avoid paying capital gains tax.	A charitable bequest can produce a charitable estate tax deduction, which will reduce estate taxes if you have a taxable estate. You will want a tax-wise estate plan so that you leave the right assets to family (real estate and stock) and to charity (such as retirement assets). This will help you reduce taxes for your family as well.



## What Are Your Goals?



If your charitable goals include seeing how your gifts are making a difference while also leaving a lasting legacy...



If your tax planning goals include reducing your income taxes and avoiding capital gains taxes and future estate taxes...



If your personal and family goals include providing for family with a tax-wise estate plan...

Then a current gift combined with a charitable bequest may be right for you.

# Definitions

## Current Giving

Gifts made today to support ENV students. These are typically made by cash, check or a gift of a specific asset, such as stock or real estate.

## Charitable Income Tax Deduction

A tax benefit you receive when making a charitable gift. The deduction reduces your tax liability in the year that the gift is given to charity. The amount of the deduction is typically equal to the fair market value of the charitable gift.

## Charitable Bequest

A gift left to charity in your will or estate plan. You can leave a specific asset, a percentage of your estate, a residual gift (which is the rest of your estate after all other bequests have been made) or a contingent bequest (if the primary beneficiary, such as a relative, cannot accept or decides not to accept the bequest, the gift will go to the charity of your choice).

## Estate Tax Deduction

The potential tax benefit your estate and family will receive if you leave a charitable gift to an organization such as Cal Poly Pomona in your will, trust or other documents that are part of your estate plan.



## Let Us Help You

There are numerous ways to structure gifts dependent on your own personal situation. We can help you create a gift strategy to achieve your goals while supporting Environmental Design students at Cal Poly Pomona. Please contact us to learn more.

Vince Fraumeni  
Director of Planned Giving  
3801 West Temple Ave.  
Pomona, CA 91768  
909-869-4825  
vjfraumeni@cpp.edu  
www.cpp.edu/plannedgiving

Jenkins Shannon  
Sr. Director of Development  
College of Environmental Design  
jshannon@cpp.edu  
909-869-5128

