

# Tell Me More

- ☐ I am interested in learning how to make a gift by will or trust.
- ☐ I am interested in learning about other options for including Syracuse University in my estate plan.
- ☐ I am pleased to inform you that I have included Syracuse University in my estate plans.

Name

Address (if changed)

City, State

Zip

Email

Telephone

For confidentiality, fold on dotted line, tape, and return.



640 Skytop Road, 2nd Floor, Syracuse, NY 13244

# New Year, New Benefit



Cut here.





# Tomorrow's Legacy Created Today

Your legacy gift to Syracuse University is not just an investment in our students' futures; it's also a powerful way to benefit you, your estate, and your loved ones when executed thoughtfully. The process is easier than you might think. Here are two impactful ways to make a difference, along with a new tool designed to simplify your planning.

## Gifts by Will or Trust

You can designate a specific dollar amount, a particular asset, a percentage of your estate, or the remainder of your estate after all other wishes have been fulfilled by naming Syracuse University as a beneficiary in your will or living trust. This option allows you to maintain full control of your assets during your lifetime and still direct your gift to the area that aligns with your priorities such as financial aid support, academic program support or athletic competitive excellence funds.

## Beneficiary Designation

Adding Syracuse University as a full or partial beneficiary on any IRAs, 401(k) or 403(b) accounts, bank accounts, life insurance policies, annuities, or other financial accounts is simple to do and doesn't require altering your current planning documents. This straightforward approach can help minimize income taxes and reduce estate taxes for your heirs.

## Let's Connect

If you are ready to include Syracuse University in your legacy plans and wish to explore these options to determine which is best for you and your loved ones, contact the Office of Gift Planning, at **888.352.9535** or **GiftPlan@syr.edu**. Your legacy is important, and we're here to support you in making it a reality.

## Take the Next Step

Syracuse University is excited to offer our alumni complimentary access to a secure, user-friendly tool. With Giving Docs, you can craft your will and other estate planning documents in just a few minutes. By including Syracuse in your estate plans, you empower future generations to experience the transformative education that defines our university—creating a legacy with lasting impact. Learn more here:

[givingdocs.com/syracuse](https://givingdocs.com/syracuse).



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NECESSARY  
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IN THE  
UNITED STATES

**BUSINESS REPLY MAIL**  
FIRST-CLASS MAIL PERMIT NO. 5299 SYRACUSE, NY

POSTAGE WILL BE PAID BY ADDRESSEE

The Office of Gift Planning  
Syracuse University  
Office of Gift Planning  
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Syracuse, NY 13244