

Gifts That Protect Your Assets

Leave more for your family and make an extraordinary impact on the future.



You've worked hard and invested well. Now you want to make a difference.

Are you wondering how to handle appreciated stock or real estate, or a growing family business? Are you concerned that taxes will consume much of the value you've worked so hard to build? Do you worry there won't be enough left for you and your loved ones?

With a strategic gift to Swarthmore College, you protect your assets, and at the same time provide enduring support for the future of education.

More and more friends of Swarthmore are discovering these creative win-win gifts.

Minimize your taxes.
Maximize your assets.
Extend your impact on the future.

Benefits & planning points

- You can donate your home, continue to live in it, and take a partial tax deduction immediately.
- You can contribute the value of your residence or other property, take a partial tax deduction, and receive regular payments for life.
- You can sell your property at a discount, deduct the difference and receive a lump sum of cash or payments over time.
- You can use a gift to reduce the cost of transferring ownership of a growing family business.
- You can use your most valuable asset to make a difference that will endure for future generations.



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A gift that protects your assets might be right for you if...

- You have appreciating assets you want to pass on to the next generation with as little tax as possible.
- You want to reduce or eliminate your gift and estate taxes.
- You own a property that you want to continue using for the rest of your life but your children don't want to inherit.
- You believe in the mission of Swarthmore and want to see it continue for generations to come

Interested?

Contact us to learn more about gifts that protect your assets. We would be happy to collaborate with you and your advisors to plan a gift that achieves your financial and philanthropic goals.

