Did you know that the beneficiaries named on a retirement plan or life insurance policy determine who will receive these funds, even if they are designated differently in your will? Did you also know that funds remaining in your IRA may be subject to multiple taxes if left to your estate?

If you are considering including a gift for Carleton in your will, we have a simple solution. Name Carleton as a beneficiary or partial beneficiary of your retirement plan and leave other less-taxed assets to your family.

It’s Easy As 1, 2, 3!

1. Request a “change of beneficiary” form from your plan administrator.

2. List Carleton as beneficiary at the following address:
   One North College Street
   Northfield, Minnesota 55057

3. Inform us of your intentions so we can thank you!

FOR MORE INFORMATION
Lynne Wilmot ’89
Director of Gift Planning
Phone: 507-222-2400 • Email: lwilmot@carleton.edu
Mail: One North College Street, Northfield, Minnesota, 55057