Retirement Plan Assets

How You Benefit

• You make a commitment to Carleton today with little or no impact on your current cash flow or investments.

• You retain control over your assets during your lifetime.

• Your gift can be structured to benefit Carleton after you die, or after both you and your spouse have died.

• If you leave retirement assets to your family or friends after your death, these gifts may be reduced by income and estate taxes. To maximize your bequests:
  » Leave retirement assets (such as IRA, 401(k), 403(b), or TIAA-CREF plans) to Carleton and other charities.
  » Use other assets (such as insurance, stock, or real estate) to make bequests to family members and friends.

How Carleton Benefits

After your death, Carleton will be able to use your gift—either as an addition to the endowment or for a purpose you specify.

Planning Tips

To make Carleton a beneficiary of your retirement plan, simply contact your plan administrator and complete the required form. You may need to provide the following information:

- **Legal name:** Carleton College
- **Address:** One North College Street
  Northfield, MN 55057
- **Tax ID#:** 41-0694747

If you express your gift as a percentage (e.g., “20 percent of my account”), you can maintain the same relative gifts to charities and your heirs, regardless of changes in account value.

If you are considering designating your gift for a specific purpose, such as a scholarship fund, or support for a specific department, contact us to ensure that we understand your wishes.

Questions? Please Contact Us

Phone 800-492-2275 • 507-222-4200
Email planned-giving@carleton.edu
Web giftplanning.carleton.edu
One North College Street
Northfield, MN 55057

Disclosure: This information is not intended as legal advice. Please consult your attorney or financial adviser to learn if a charitable bequest is appropriate for your situation.