



Fort Lewis College Foundation
1000 Rim Drive
Durango, Colorado 81301-3999

Planned Giving Questions & Answers

What is “Planned Giving”?

Charitable gifts range from a ten dollar cash gift to creating a trust to including a bequest in a will. Gifts that require more thought, decision-making and the guidance of professionals have led to the term “planned giving”.

Are planned gifts complicated?

The majority of planned gifts are very simple to set up. Bequests and beneficiary designations on insurance policies or retirement plans are among the least complicated. Gift annuities are also completed with a minimum of time and paperwork. Charitable trusts and other more complex charitable gift instruments can be completed with the help of competent professionals.

Who is available to help in this process?

Charitable giving, financial planning and legal professionals are some of your best resources to answer questions and serve as guides. The Fort Lewis College Foundation planned giving website (<http://www.plan.gs/Home.do?orgId=5537>) is also a great place to help you begin the process.

Can I direct my gift to a specific fund?

The Fort Lewis College Foundation encourages unrestricted (to be used where most needed) gifts, as well as gifts given for a specific use (such as student scholarships). This is true for planned gifts as well as current gifts.

What is the most common type of planned gift?

By far the most common form of planned gift is a simple bequest in a person’s will. In fact, bequests account for 85% of all planned gifts. Charitable gift annuities, beneficiary designations, trusts and other types of gifts make up the other 15%.

If you have further questions about planned giving, please contact Jeff Jantz at 970.247.7069, or jantz_j@fortlewis.edu

