

SJSU SAN JOSÉ STATE
UNIVERSITY



Easy Ways to Leave a Legacy

A Guide to Gifts in a Will or
by Beneficiary Designation



How Will You Be Remembered?

Throughout our lives, we reflect on what we have achieved and what we are still hoping to accomplish. This process is often how we reconfirm our values and align ourselves with what we most believe in.

Maybe you've wished you could do even more to create dynamic experiences and opportunities for our students, but you were concerned about making a commitment you might not be able to keep or making a gift with a financial asset you might end up needing for yourself.

There are many ways to create a lasting legacy that offer you the flexibility you need. Please read on to learn more.



Benefits to You

A gift in your will or by beneficiary designation to SJSU, not only supports our mission for years to come, but also...

- Costs you nothing now and requires nothing more than your signature.
- Can be changed at any time for any reason.
- Has no minimum required amount – a gift of any size makes a difference.
- Can reduce or eliminate taxes on retirement assets.

Gift Planning Information

Legal Name: The Tower Foundation of SJSU

Address: One Washington Square
San Jose, CA 95192

Tax ID: 83-0403915

Popular Ways to Leave a Legacy:

Gifts by Bequest

You can include SJSU in your will or living trust by...

- Naming SJSU as a beneficiary in your will or trust, designating the specific gift of your choice (for example, cash, real estate, personal property, or securities).
- Giving a fraction or percentage of your estate.
- Leaving a residual gift that is made after all other debts, expenses and other bequests are made.

With this gift, you maintain complete control of your assets during your lifetime, and can save on income, capital gains, and estate taxes.

Suggested Bequest Language

To leave your gift to SJSU please use the following language:

“After taking care of all expenses, debts and other specific provisions, I give, devise and bequeath ____ percent of the rest and residue [or \$____ if a specific amount] to Tower Foundation of San Jose State University a non-profit corporation headquartered in California, 83-0403915 currently with administrative offices at University Advancement, One Washington Square, San Jose, CA 95192.”



Gifts by Beneficiary Designation

You probably have assets that pass beyond the provisions of your will or trust. Examples include life insurance policies, Individual Retirement Accounts (IRAs), commercial annuities, and retirement plans.

You can reduce income taxes and possibly estate taxes for your loved ones, by naming SJSU as a beneficiary of one or more of these financial accounts. To do this, simply contact the financial institution that administers the desired account and request a change of beneficiary form.

Our Promises to You

Should you decide to create your legacy of transformative education by leaving a gift to SJSU in your will or by beneficiary designation, we hope that you will let us know so that we may honor your commitment with membership into our Heritage Society. We promise...

- To respect your privacy – we will keep your gift anonymous unless you tell us otherwise.
- To use your gift in the way you intended.
- That you can change your plans and/or beneficiaries at any time—you are not obligated by a decision you make today.
- That we will continue to meet the highest standards of transparency in order to remain worthy of your legacy.

We are grateful for your support and thank you for taking action with us to build the next generation of change-makers.

I'm Here to Help



Randy Balogh

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Visit our legacy website at legacy.sjsu.edu.

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This information is not intended as legal, accounting or other professional advice. For assistance in charitable planning, consult an attorney for legal advice or obtain the services of another qualified professional.