

# Consider a Planned Gift to OLLI

OLLI@CSUMB has grown from a few dozen participants to more than 900 over the course of a decade. Members have expanded their intellectual horizons, come away with fresh insight and met new friends.

If this describes you, we hope you'll consider making a gift. Your support helps maintain our flourishing program and implement our plans for the future.

OLLI is financially self-supporting. Funding comes from an endowment payout from The Bernard Osher Foundation, member fees and donations. OLLI@CSUMB receives no state or university funding.

A planned gift via our legacy program ensures that OLLI will be here for years to come. You don't have to be of a certain age or wealthy to make a planned gift. Options are plentiful and include gifts of stock, bonds, CDs and real estate. You can also name OLLI as the beneficiary of an IRA, pension or life insurance policy.

If you are interested in making a planned gift or bequest to OLLI, we can help.

[olli@csumb.edu](mailto:olli@csumb.edu) | [csumb.edu/OLLI](http://csumb.edu/OLLI)



## What Will Tomorrow's OLLI Look Like?

### Whatever you make it!

When you make a contribution or planned gift to OLLI@CSUMB, you help to shape the program's future. Your support ensures that members will continue to enjoy an intellectually stimulating environment where camaraderie and conversation flourish and the program thrives. Your gift allows us to keep fees low and supports classroom technology, innovative programming and teacher honorariums.

To donate by mail, please make your check payable to "University Corporation at Monterey Bay" and designate "OLLI" in the memo line.

#### Send to:

OSHER LIFELONG LEARNING INSTITUTE  
CSU MONTEREY BAY  
100 CAMPUS CENTER @ RYAN RANCH SEASIDE,  
CA 93955

#### Or Contact

Michele Crompton  
Director, OLLI@CSUMB  
(831) 582-4377  
[mcrompton@csumb.edu](mailto:mcrompton@csumb.edu)

Make OLLI a part of your legacy!



## Planned Giving



Your Legacy.  
Our Future.

# Choose the Gift that Matches Your Goal

## GIFT TYPE

## BENEFIT TO DONOR\*

**Outright Gift of Cash  
(including matching gifts)**

Claim charitable tax deduction.

**Bequest**

Leave lasting legacy, maximize use of assets, and avoid estate tax.

**Stocks or Bonds**

Claim a full charitable tax deduction and avoid capital gains tax.

**Real Estate**

Claim charitable tax deduction and avoid capital gains tax.

**Annuity**

Claim charitable tax deduction and receive regular annuity payments for life.

**Deferred Payment Annuity**

Claim an immediate tax deduction and receive higher annuity payments after the deferment period.

**Charitable Remainder Trust**

Claim tax deduction, avoid capital gains tax, and receive regular annuity payments.

**Retirement Plan or Life Insurance Policy**

Claim current and possibly future charitable tax deductions with minimal personal cost.

\*Talk with your tax advisor for information on specific deductibility.

