



Legacy Gift Planning

- Susan Berkman, Assistant Vice President for
Gift Planning & Major Initiatives at CSULB

If you don't plan, there may not be a gift!

Creating an estate plan is important to do, but easy to put off. Without written plans, your health care wishes may not be known or honored. The gifts you want to make to family, friends and charities may not happen, and the administration of your estate will land in court and incur significant costs.

A good friend of CSULB loved what he learned here and wanted to help future students continue their learning. But he did not act before the unexpected happened. He passed away suddenly without a will and his estate went to court where it has been for two years. Had he completed his written plans, his estate would have been easy to close and distribute without delay. His wishes would have been honored.

The CSULB Gift Planning Office knew he was thinking about his plans. We worked with him to document his wishes in writing (even though he didn't finish). This is called "planned giving" – outlining your wishes for how the campus should use your gift when it comes in the future. We can help you donate non-cash assets such as real estate or retirement plans and life insurance. In other words, we can help you support OLLI and/or other favorite campus programs now, even if the contribution comes later. We can also provide a free Wills Guide and referrals to local estate planning professionals if needed.

The OLLI "25 for 25" Planned Giving Campaign is designed to maximize everyone's ability to celebrate OLLI and its 25 years of service to seniors (50+). Give us a call to participate in the campaign and to formalize your plan this year. You can reach CSULB Gift Planning at (562) 985-5489, by email at [Gift.Planning](mailto:Gift.Planning@csulb.edu) or through "Contact Us" on our web site, www.csulbgiftplanning.org.