



NC STATE UNIVERSITY

The NC State Donor Advised Giving Fund

A powerful new way to support NC State and your other favorite charities

Let's achieve more together

Your giving makes you part of a special community of people who turn their passion for NC State and causes they care about into action. The NC State Donor Advised Giving Fund is a donor-advised fund, a one-of-a-kind giving opportunity. It offers you a personalized charitable giving fund—named the way you want—with innovative and flexible ways to make a bigger impact with your charitable dollars while providing special support for NC State.



Maximum giving power in a simple, tax-smart way

- Contribute cash, stock or other assets* to fund projects at NC State, as well as other IRS-qualified charities—at any time, now or in the future.
- Compound your giving through strategic tax planning—benefits include potential tax deductions on contributions to your NC State Donor Advised Giving Fund and no capital gains tax on donated appreciated securities.
- Simplify giving with a “one-stop shop” approach. Recommend how you want to give; the rest is taken care of for you—including distributing the funds and all the paperwork. You’ll have a single place to track all your giving.



Dedicated support for NC State

- Contribute all in one place, with a portion (50%) designated for NC State and the rest available at your discretion to support other non-profits.
- Allocate your giving strategically over time to the causes or projects you support at NC State and other charitable organizations.
- Donated assets to your NC State Donor Advised Giving Fund are invested until distributed and any growth is tax free, offering you even greater giving potential to support NC State and all the causes close to your heart.
- Make your mark through innovative strategies, such as naming and using the fund like a foundation.

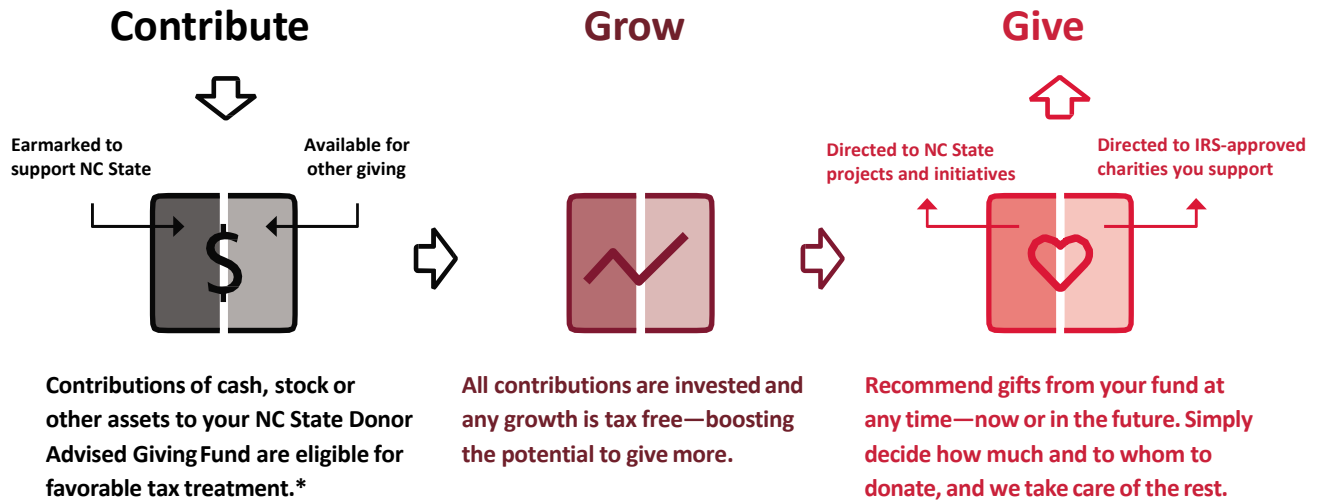


A legacy you can pass along

- Involve family members in your giving now and/or pass a portion of the NC State Donor Advised Giving Fund along to them later to continue your giving legacy.
- Use the NC State Donor Advised Giving Fund as an easy way to establish a planned giving agreement with NC State without the legal expense and complexities.
- Name NC State or other charities as beneficiaries of the non-dedicated portion of your NC State Donor Advised Giving Fund to extend your legacy even further.

Call 919.515.5106 to learn more or visit ncsu.donorfirstx.com to open a NC State Donor Advised Giving Fund

The NC State Donor Advised Giving Fund is an innovative giving opportunity



Use the NC State Donor Advised Giving Fund in flexible ways to suit your goals

- **Tap into additional sources of wealth like long-term appreciated assets**—Place stock, real estate, life insurance, or other assets* in the fund. You pay no capital gains tax on long-term appreciation, putting your gains to work for your charitable goals. Any growth is tax free.
- **Choose from several investment approaches**—Match your investment strategy to your giving time line and risk tolerance, investing conservatively or opting for greater growth potential that could add to your giving power.
- **Increase your impact over time**—Build up to a major gift or save for longer-term projects.
- **Make a planned gift**—Use the fund as an easy way to establish a planned giving agreement with NC State without the legal expense and complexities.
- **Take advantage of high-income years or “windfalls”**—Turn your windfall into an opportunity to maximize your deductions through itemization and to prefund several years (or decades) of giving.

About the NC State Donor Advised Giving Fund

The NC State Donor Advised Giving Fund is a donor-advised fund (DAF) offered by the Office of Gift Planning at NC State.

*The NC State Donor Advised Giving Fund accepts certain complex assets, which may include real estate, C-Corp stock, LLC and limited partnership interests, life insurance policies, patents, royalties and copyrights. Contributions are subject to review by the Sponsoring Organization.

Contributions to the NC State Donor Advised Giving Fund are irrevocable. All recommendations from donors are subject to review and approval by the Sponsoring Organization.

TIAA Charitable, Inc. is the Sponsoring Organization of the donor-advised fund. TIAA Charitable has been recognized by the Internal Revenue Service as a tax-exempt public charity under Sections 501(c)(3) and 170(b)(1)(A)(vi) of the Internal Revenue Code of 1986, as amended (the “Code”).

TIAA Charitable is the brand name for an independent public charity that maintains a donor-advised fund program. The TIAA name is a registered mark of Teachers Insurance and Annuity Association of America and is used by TIAA Charitable pursuant to a license.

The Sponsoring Organization, North Carolina State University, the Program, and their respective employees, agents or representatives do not offer legal or tax advice. The tax information contained herein is not intended to be used and cannot be used by any taxpayer for the purposes of avoiding tax penalties. Before establishing a NC State Donor Advised Giving Fund, taxpayers should seek advice based on their own particular circumstances from an independent advisor.