



**PennState**  
University Development

### **The Penn State Giving Fund**

A powerful new way to support  
Penn 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 the institutions and causes they care about into action. The Penn State 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 Penn State.



### Maximum giving power in a simple, tax-smart way

- Contribute cash, stock or other assets to fund projects at Penn State, as well as other IRS-qualified charities—at any time now or in the future.
- Compound your giving through strategic tax planning—eliminating capital gains—and tax-free growth.
- Simplify giving with a “one-stop shop” approach. Recommend how you want to give; we do the rest—distributing funds and taking care of the paperwork. You'll have a single place to track all your giving.



### Dedicated support for Penn State

- Contribute all in one place, with a portion earmarked for Penn State and the rest available to support other non-profits.
- Allocate your giving strategically over time to the causes or projects you support.
- Make your mark through innovative strategies such as naming and using the fund like a foundation.
- Receive recognition at potentially higher donor levels based on the full amount of your dedicated contribution, regardless of how the money is directed later.

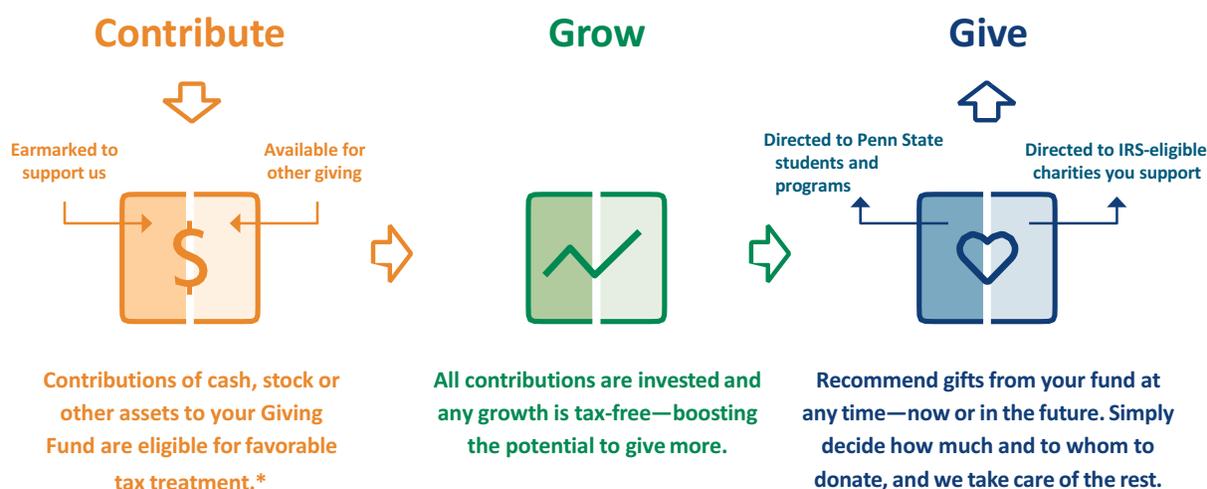


### A legacy you can pass along

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

**Call 888-800-9170 to learn more or visit [psu.donorfirstx.com](http://psu.donorfirstx.com) to open a Giving Fund.**

## The Penn State Giving Fund is an innovative giving opportunity.



### Use the 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.
- **Achieve higher-level donor membership**—Potential to receive recognition for the full amount of your dedicated gift to us no matter how the funds are directed later.
- **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 us 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 Penn State Giving Fund

The Penn State Giving Fund is a donor-advised fund (DAF) offered by Penn State’s Office of University Development.



\* The Penn State 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 Penn State Giving Fund are irrevocable. All recommendations from donors are subject to review and approval by the Sponsoring Organization.

The Sponsoring Organization, Penn State, 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 Giving Fund, taxpayers should seek advice based on their own particular circumstances from an independent advisor.

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.