

Links to Gift Planning Resources

AN INTRODUCTION TO GIFT PLANNING

For fundraisers: [Gift Planning and Blended Gifts at a Glance](#) • 3/17/2022

For donors: [Gift Planning Overview](#) • 4/20/2023

PLANNED GIFT TYPES

Bequests and Beneficiary Designations

- [Overview for fundraisers](#) • 3/4/2022
- [Confirmation of Future Support form](#) • 1/1/2024
- [One-sheeter for donors](#) • 7/1/2020

Charitable Lead Trusts

- [Overview for fundraisers](#) • 8/1/2020
- [One-sheeter for donors](#) • 9/1/2020

Charitable Gift Annuities (a Life Income Gift)

- [Overview for fundraisers](#) • 1/25/2024
- [Workflow for fundraisers](#) • 1/25/2024
- [One-sheeter for donors \(CGAs and CRTs\)](#) • 1/1/2024

Charitable Remainder Trusts (a Life Income Gift)

- [Overview for fundraisers](#) • 1/19/2023
- [One-sheeter for donors \(CGAs and CRTs\)](#) • 1/1/2024

Qualified Charitable Distributions

- [Overview for fundraisers](#) • 1/22/2024
- [One-sheeter for donors](#) • 1/22/2024

UVA Donor Advised Fund

- [Fact sheet for fundraisers](#) • 6/29/2021
- [One-sheeter for donors](#) • 9/15/2021

ASSET TYPES

Appreciated Securities

- [Overview for fundraisers](#) • 3/4/2022
- [One-sheeter for donors](#) 12/2/2020

Cryptocurrency

- [One-sheeter for donors](#) • 8/16/2021

Life Insurance

- [Overview for fundraisers](#) • 8/18/2020
- [One-sheeter for donors](#) • 9/1/2020

Privately Held Securities

- [Overview for fundraisers](#) • 12/18/2020
- [One-sheeter for donors](#) • 9/1/2020

Real Estate

- [Overview for fundraisers](#) • 8/11/2020
- [Workflow for fundraisers](#) • 12/15/2019
- [UVAF Real Property Checklist](#) • 12/9/2022
- [Transform Property into Legacy brochure for donors](#) • undated
- [One-sheeter for donors](#) • 1/9/2024

Real Estate: Retained Life Estate Gifts

- [One-sheeter for donors](#) • 6/5/2023

Tangible Personal Property

- [Overview for fundraisers](#) 8/13/2020
 - [One-sheeter for donors](#) • 9/1/2020
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OTHER RESOURCES

[What Is a Qualified Appraisal?](#) | An article for fundraisers or donors

[Will Planning Guide](#) | For donors

Communicators, if you are interested in branding the donor materials above for your school or program, contact Kim Wendel at kew3c@virginia.edu.



Gift Planning

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