

Links to Gift Planning Resources

AN INTRODUCTION TO GIFT PLANNING

For fundraisers: [Gift Planning and Blended Gifts at a Glance](#) • 5/1/2024

For donors: [Gift Planning at a Glance](#) • 5/1/2024

For donors: [Gift Planning at the University of Virginia](#) • Undated

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](#) • 5/1/2024

[Workflow for fundraisers](#) • 5/1/2024

[One-sheeter for donors \(CGAs and CRTs\)](#) • 5/1/2024

Charitable Remainder Trusts (a Life Income Gift)

[Overview for fundraisers](#) • 1/19/2023

[One-sheeter for donors \(CGAs and CRTs\)](#) • 5/1/2024

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

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

giftplanning@virginia.edu
434-924-7306 | 800-688-9882 (toll-free)

giving.virginia.edu/giftplanning

UPDATED 5-1-2024