



Office of Advancement

## Gifts of Retirement Plan Funds

### Leave a legacy through your retirement plan.

Naming Hobart and William Smith Colleges as a beneficiary of your qualified retirement plan is a way to fulfill your charitable intent without having to revisit your Will or Trust documents and can be one of the most tax efficient tools in the planned giving toolbox.

### How It Works

You can name HWS on your Plan Provider's Beneficiary Form, and work with us to ensure that your gift, when realized, goes to support the academic area, athletic fund, or, student experience etc. of your choosing.

### What are the benefits?

- Become a Wheeler Society Member
- Work with the Colleges to designate to the area or fund of your choice
- You can change your beneficiary designations at any time
- A charitable beneficiary is not subject to the income tax that would otherwise be passed on to your heirs



HOBART AND WILLIAM SMITH COLLEGES

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PREPARING STUDENTS TO LEAD LIVES OF CONSEQUENCE