



Marc A. Levin
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Giving to the Institute of Governmental Studies

Private support for the UC Berkeley Institute of Governmental Studies (IGS) is essential. Recent cutbacks in state support for the University means we must rely more on donors for ensuring our students and faculty have access to first-rate resources and facilities. Only 24% of the IGS budget comes from University sources, so private support is vital to ensuring our excellence.

Making a gift to the Institute of Governmental Studies (IGS) provides a twofold benefit: 1.) All gifts made to IGS are tax deductible as allowable under federal and state laws; 2.) By making a gift you automatically join the *Friends of IGS*.

To learn more about the Friends of IGS, visit its website:

<http://igs.berkeley.edu/friends>

IGS donors receive a complimentary subscription to the *IGS Public Affairs Report*, receive electronic invitations to our seminars, events and conferences, and receive special invitations to exclusive special programs not always open to the general public. Our donors are listed in the annual Honor Roll that is published in the *IGS Public Affairs Report*. Lastly, our financial supporters get the intrinsic gift of knowing they are directly helping to train the next generation of future leaders.

How to make a gift:

Gifts can be made by means of personal check or credit card. Checks must be made payable to: **UC Regents** and sent to:

Friends of IGS
c/o Institute of Governmental Studies
109 Moses Hall # 2370
University of California
Berkeley, CA 94720-2370

Gifts can also be made using a valid credit card via the University's secure online-giving website called *givetocal.berkeley.edu*.

Here is the URL to make an online gift to IGS:

http://givetocal.berkeley.edu/makeagift/institute_gov_studies

By using the above URL your gift will automatically be credited to IGS and a confirmation will be sent by email. Credit card gifts can be accepted over the telephone by calling Ms. Janeen Jackson at 510/642-4608.

Gift acknowledgement letters are sent upon receipt so that you may use this record for tax reporting purposes. The University of California is a public, nonprofit educational institution exempt under Section 510 (c) 3 of the IRS Tax Code.

The University's Tax ID (EIN) #s are as follows:

UC Regents:

94-6002123

UC Berkeley Foundation:

94-6090626

The Annual Fund provides essential monies that can be used at the discretion of the IGS Director to meet needs that are not supported by the state budget. These unrestricted funds are particularly valuable because of their flexibility. The annual fund is vital for financing ongoing student programs and special projects.

Endowed or Memorial Funds provide a permanent source of income to meet the needs of faculty and students. The Institute has several endowments, including the following: Joseph Harris Education Trust, Franklin K. Lane Memorial Endowment, Dorothy C. Tompkins Library Endowment Fund, Victor Jones Memorial Lecture Fund, etc. IGS offers opportunities for establishing and naming endowed funds. A named gift can be created for \$50,000 and above (minimum amount for naming a fund).

Gifts may also be designated to the following specific IGS programs:

IGS Library
Robert T. Matsui Center for Politics & Public Service
Cal-in-Sacramento Internship Program
John Gardner Public Service Fellowship
IGS Visiting Scholars' Fund

Forms of Giving and Gift Planning:

Benefits for IGS and for the Donor

Many different kinds of gifts can benefit both you and the University. Several of these can offer particular estate planning advantages such as an annuity. The University's professional staff with the Office of Gift Planning (OGP) would be pleased to discuss these gift vehicles with you; however the University urges you also to consult your attorney or financial advisor.

To contact the OGP:

Phone: (510) 642-6300

Fax: (510) 643-9066

Email: ogp@berkeley.edu

http://urel.berkeley.edu/dev_and_campaign/giving.html

Gifts can be made over time in the form of a pledge. A gift agreement is the instrument used to specify the terms of a designated gift. This document is signed by the donor and the Chancellor and usually administered by the **UC Berkeley Foundation**.

If you wish your gift to benefit IGS, any legal documents (e.g., will, estate trust, etc.) or instructions should specify that the gift is for:

The Institute of Governmental Studies at the University of California, Berkeley

SECURITIES. In most cases, gifts of appreciated securities may be deducted at full market value as of the date you make the gift, and the donor does not have to pay capital gains taxes. Gifts of appreciated stock are most easily handled by the UC Berkeley Development Office and should not be sold prior to transfer. You or your broker may contact **Ms. Sylvia Worthington, (510) 642-4123; sworthington@berkeley.edu** for further information. Stock can be transferred electronically. If you wish to give the gift of *depreciated* stock you should first sell it and give the proceeds to the Regents. You can then use the loss to offset any gains and also claim a charitable deduction.

REAL ESTATE. Gifts of real property may be deeded to UC Berkeley for the benefit of IGS, providing significant tax advantages to the donor in most cases. It is also possible to deed a home or farm to the University and to occupy it for life.

LIFE INCOME GIFTS. A number of options are available by which you may transfer assets to a trust (to be managed either by the University or a trustee of your choosing) and receive income for yourself and/or a designated beneficiary for life, as well as immediate tax benefits. The Institute ultimately receives the trust property.

BEQUESTS. A fixed amount or a percentage of your estate may be designated for the benefit of the Institute of Governmental Studies in your will or living trust. IGS may also be designated as the beneficiary of an IRA that might otherwise be heavily taxed.

MATCHING GIFTS. Hundreds of firms match their employees' (and sometimes retirees') contributions on a 1:1, 2:1 or even 3:1 basis. If your company has such a policy, please indicate this when making a gift. These forms can be obtained from your personnel or employee relations' office. When making a matched gift, please submit the appropriate matched gift form from your employer at the time of making the gift.

For further information on supporting IGS, please contact:

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