

Today's Agenda: INVESTING IN NORTHEASTERN



This holiday season, you may be planning your year-end support for the organizations you care about most—like Northeastern University—and now is a good time to invest your long-term appreciated securities, such as stock or mutual funds.* Your donation of appreciated securities held for more than one year can result in significant tax benefits for you and your family.

Here are two ways that you can invest long-term appreciated securities with a gift to Northeastern:

Make an Outright Gift

When donating long-term appreciated securities, you will receive the same income tax savings that you would if you wrote a check—and you will have the added benefit of eliminating capital gains tax on the transfer. For instructions on making an outright gift of securities, visit giving.northeastern.edu/ways-to-give/stocks-mutual-funds-ira-rollovers.

Fund a Charitable Gift Annuity

If you are age 55 or over, funding a gift annuity with long-term appreciated securities will not only provide you with reliable and fixed payments for life but will also offer financial benefits. You will receive a federal income tax deduction in the year the gift is made, and eliminate part of the capital gains tax you would have paid by selling the securities. For more information on charitable gift annuities, visit plannedgiving.northeastern.edu/charitable-gift-annuities.

Guarantee returns with an investment in Northeastern's future!

*Mutual funds can take 2–4 weeks to process. Please plan accordingly with your financial institution.

Next action:

Contact Northeastern's Office of Gift Planning at giftplanning@northeastern.edu or **617.373.2030**. To explore ways to give, visit giving.northeastern.edu.