



When you make a planned gift to the **Naval Postgraduate School Foundation**, whether through bequests, trust, or your retirement plan, you are investing in the cutting edge research and future leaders that give the United States a decisive advantage over our adversaries, now and into the future.

Your legacy will be one of strength and commitment to our Nation and those who serve it.

There are a variety of planned giving options that allow you to support the Naval Postgraduate School Foundation while meeting your financial goals and providing for your family.

A CURRENT WILL OR TRUST – *Control your estate.*

A bequest from either a will or living trust lets you pass any amount you wish to the NPS Foundation free of estate tax. You can give cash, specific property, or a percentage of your estate.

Benefits:

- Continue to provide for your family
- Distribute your assets according to your wishes
- Save on estate taxes with proper planning
- Leave a legacy without giving up assets during your lifetime

THE REVOCABLE LIVING TRUST – *Privacy and security you can count on.*

A living trust can be an effective way to maintain control of property during your lifetime—and a private way to release it after your death.

Benefits:

- Allows you to modify trust provisions or change beneficiaries during your lifetime
- Avoids the costs and delays of probate—and remains confidential
- Provides professional management, if you choose a corporate trustee
- Removes assets from your taxable estate for the portion of the assets distributed upon your death to a charitable organization

RETIREMENT PLAN ASSETS – *Avoid double taxation.*

Most retirement plan assets face double taxation. Not only is the amount diminished by estate taxes, but the recipient also must pay income taxes on it. Avoid federal income and estate taxes by naming NPS Foundation a beneficiary.

Benefits:

- Avoid all federal income and estate taxes when you name NPS Foundation as the primary beneficiary
- Receive partial savings when you give NPS Foundation a specific amount before bequeathing your family
- Name NPS Foundation as the contingent beneficiary for greater flexibility

LIFE INSURANCE – *Secure your family's needs and give back.*

If you are thinking about a contribution to the NPS Foundation, a gift of your life insurance could be sensible, and generous course of action. You will receive an estate tax-deduction for the insurance proceeds if you name the NPS Foundation the beneficiary of the policy. You can also use life insurance to replace the value of a different gift.

Benefits:

- Gain flexibility by naming us as a beneficiary while keeping ownership
- Name NPS Foundation as a contingent beneficiary and secure your family's needs first

CHARITABLE GIFT ANNUITY* – *A gift that pays you for life.*

The concept of a gift annuity is simple. You donate assets that the NPS Foundation invests. The NPS Foundation agrees to make fixed payments to you for life (and, if desired, for another beneficiary's lifetime). At the end of the agreement, the funds are available for the Foundation's use.

Benefits:

- Receive lifetime payments for yourself and possibly another person
- Obtain a charitable deduction for a portion of the value of the gift
- Secure partially income tax-free payments
- Save on capital gains taxes

*Not available in all states

CHARITABLE REMAINDER UNITRUST – *A gift with built-in flexibility.*

A charitable remainder unitrust is a combination of a gift and an investment plan. You place assets in a trust, and you (and/or another beneficiary) receive lifetime income from them—NPS Foundation receives the remainder.

Benefits:

- Receive lifetime income (often greater than the yield on contributed assets)
- Obtain a sizable income tax charitable deduction
- Avoid up-front capital gains tax if you donate long-term
- Make a significant gift to one or more charitable organizations

The Naval Postgraduate School Foundation is a non-profit organization and does not provide tax, legal, or financial advice. Any document or information shared by our staff is intended to be educational. We strongly encourage donors to consult their own legal and financial advisors.

About the Naval Postgraduate School Foundation

The Naval Postgraduate School Foundation is a 501(c)(3) nonprofit providing support and advocacy to the Naval Postgraduate School, our Nation's only graduate institution to serve, develop, and educate students with operational experience in order to serve the unique needs of the Naval and Joint Forces. The nature of global competition is increasingly connected and rapid. It will take networked and agile leaders with diverse perspectives to propel our nation forward with sustained advantage. The NPS Foundation is at the intersect of engagement with students, alumni, faculty, the broader DOD, and industry in addressing challenges and identifying opportunities that advance the capabilities of the Department of Defense, Department of Homeland Security and our allies.

Restricted Gifts: Your gift can be designated for a specific program or purpose including: The Mauz Innovation Fund, National Security Research & Innovation Initiatives, and Student & Alumni Life.

Unrestricted Gifts: Allow the Naval Postgraduate School Foundation to direct your contribution to the area of greatest need.

MAUZ INNOVATION FUND

The Mauz Innovation Fund will be a catalyst for transformative change, shaping Foundation initiatives and support, and guiding NPS towards a future that embraces cutting-edge technology, fosters an innovation-driven culture, and forges strategic partnerships of broader significance.

- **Naval Innovation Center at NPS:** The Mauz Innovation Fund will provide support for the Naval Innovation Center at NPS, ensuring that the center meets NPS' and NPS Foundation's vision and intent for the facility, attracting top faculty and partners and becoming a beacon of innovation and ingenuity.
- **Innovation Leadership Roles:** The Mauz Innovation Fund funds innovation leadership roles within both the Naval Postgraduate School Foundation and NPS itself. These roles are pivotal in guiding tech transformation, fostering strategic partnerships, and advancing the goals of the Naval Innovation Center at NPS.
- **Development of Strategic Partnerships:** The Mauz Innovation Fund will support the cultivation of strategic partnerships with industry leaders, government agencies, and research institutions to help NPS amplify its impact, attract top talent, and foster a collaborative ecosystem that accelerates breakthroughs.
- **Tech Transformation:** The Mauz Innovation Fund will support the integration of emerging technologies and innovative practices into NPS' academic and research landscape. By encouraging faculty and students to explore novel approaches, the innovation culture will thrive, propelling NPS to the forefront of technological advancement.

NATIONAL SECURITY RESEARCH

The NPS Foundation invests in early-stage research and development projects at NPS aimed at enhancing national security, deterring conflict, bolstering warfighting capabilities, and tackling military challenges head-on. This support extends to the NPS innovation cycle, which empowers operational students to contribute to the innovation and acquisition process, bridging the gap from idea to impact.

STUDENT AND ALUMNI LIFE

Through a no-fee membership structure for NPS students, alumni, and their families, the Foundation fosters a sense of community and connectivity. Regional alumni events provide opportunities for networking and professional development, while community-building events strengthen bonds among students and their families, alumni and the surrounding community. A variety of recreational clubs offer avenues for relaxation and camaraderie, enabling students and their families to enjoy meaningful downtime away from the demanding duties of service.

FOR MORE INFORMATION CONTACT:

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