



# Planning Your **PHILANTHROPIC LEGACY**

# OFFICE OF GIFT PLANNING

In the spirit of Mayo Clinic's mission to put the needs of the patient first, the Office of Gift Planning strives to put the needs of our benefactors at the forefront of our work.

## What We Do

Mayo Clinic has a dedicated team of gift planning professionals to help you find the perfect philanthropic plan whether you want to make a gift in honor of a loved one, are a business owner who wants to leave a legacy, are seeking tax benefits, or anything in between. We can easily transition more complicated assets — such as closely held stock, real estate or personal wealth — into a meaningful gift to Mayo Clinic.

## Gift Expertise

- Bequests and Beneficiary Designations
- Retained Life Estates
- Charitable Gift Annuities
- Charitable Remainder Trusts
- Charitable Lead Trusts
- Donor Advised Funds
- Charitable IRA Rollover
- Gifting Real Estate
- Gifting LLC, S-Corporation or C-Corporation Stock and Assets



## PARTNERS IN PHILANTHROPY

Gifts to Mayo Clinic can be an important part of your financial and estate planning. We strive to understand your unique life story and the values that are important to you. Through these efforts, the Office of Gift

## Our Personalized Services

- One-on-one consultations with you and/or your financial and legal advisors.
- Convenient and timely information available anytime online.
- Estate planning assistance.
- Offices in Rochester, Minnesota; Jacksonville, Florida; Scottsdale/Phoenix, Arizona; and throughout the Mayo Clinic Health System.
- Comprehensive gift calculations tailored to your needs.
- Guidance choosing the right gift vehicle for you.
- Economical and effective alternatives to an often costly private foundation.
- Consultation with a licensed realtor with 20+ years of experience in buying/selling/gifting real property.



## Benefits of Working With Our Planning Team

- Knowledgeable staff committed to your best interests.
- A seasoned team with over 150 years of gift planning experience working with benefactors.
- Wide variety of gifts accepted.
- Expert investment management.
- Mayo consistently outperforms peer nonprofits in achieving a higher-than-average return on philanthropic investments.

Planning has helped countless benefactors achieve their philanthropic goals by identifying strategic, creative and tax-advantaged gift solutions.

## Our Commitment

We are committed to working with you to ensure you find the charitable arrangements that best meet

your wishes and needs. We believe charitable planning is a dialogue that involves the benefactor, professional advisors and our gift planning staff — all working together to create your philanthropic legacy.

# HELPFUL INFORMATION

## Sample Will Language

"I give, devise and bequeath to Mayo Clinic, a Minnesota nonprofit corporation and a qualified 501(c)(3) organization, located in Rochester, Minnesota, Federal Tax ID Number 41-6011702, the sum of \_\_\_\_\_ (or % of my estate), (or other personal property herein described) to be used for its general programs in medical education and research as it shall determine."

## Mayo Clinic Tax Information

Legal Name: Mayo Clinic

Federal Tax ID Number: 41-6011702

Location: 200 First Street SW, Rochester, MN 55905

# CONTACT US

## Department of Development

### Office of Gift Planning

**Toll-free:** 855-852-8129 or 800-297-1185

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MAYO CLINIC | [mayoclinic.org](http://mayoclinic.org)

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