What Counts?

The 50th Reunion Gift is comprised of two components, **current gifts** that provide support to the College today and **future gifts** that will provide support in years to come. The timeframe for counting gifts spans nine years, beginning after the 40th reunion and running through the 50th reunion. Pledges made during the 50th reunion year can be paid over five years.

Current Gifts

Current gifts include the following:

1. All Annual Fund gifts made since July 1, 2011 (the 45th year)
   - Gifts to the Carleton Athletic Initiative (CAI)
   - Employer matching gifts
2. All non-annual fund gifts made since July 1, 2007 (following the 40th reunion)
   - Capital and endowment gifts or pledges of cash, securities, mutual funds, IRA account distributions or other liquid assets
   - Distributions or pledges from charitable lead trusts, donor advised funds or family foundations
   - Trust or estate distributions completed by June 30th of the 50th year
   - Gifts or pledges of tangible personal property, real estate or other non-liquid assets

Future Gifts (Heywood Society)

Future gifts include the following:

- Provisions in a will or living trust
- Beneficiary designations for retirement accounts, IRAs, bank accounts, donor advised funds, annuities and life insurance policies
- Charitable Gift Annuities (minimum gift $10,000)
- Charitable Remainder Trusts (minimum gift of $100,000)

Provisions creating future gifts for the College must be established and documented by June 30, 2017.

*Alumni spouses from different Carleton class years receive recognition for the full value of the household commitment in both class’s 50th Reunion gifts.

**Class participation rate is based on all gifts received, of all types, during the 50th Reunion year. All donors who make a gift, of any type, during the 50th year will receive credit for continuous years of giving.