

Planned gifts, such as living or charitable trusts, can be an advantageous way to provide for a future gift to UW-Green Bay. After providing for loved ones, you may choose to leave a legacy for the next generation of students.

WHAT IS PLANNED GIVING?

Planned giving involves providing for a future gift to charities through your financial and estate plans. The University welcomes gifts made through different planned giving arrangements. These arrangements can:

- Provide for you or your loved ones
- Entitle you to charitable income and/or gift or estate tax deductions
- Enable you to leave a legacy for UW-Green Bay

A planned gift can dramatically reduce federal estate and inheritance taxes, while providing support for students and programs.

The Foundation advises consulting with a personal accountant, tax advisor, financial planner and/or lawyer to determine the form of giving that is best for you.

Let us know your intentions: If you have named UW-Green Bay in your estate plan, please let us know so that we can ensure your gift is used according to your wishes. If you prefer your gift to be anonymous, we will honor your request for confidentiality.

WHERE YOUR FUTURE GIFT IS MOST NEEDED

- Academic programs and projects
- Phoenix Athletics
- Weidner Center for the Performing Arts
- Capital building & renovation projects
- Named chairs and professorships
- Named endowments
- Annual & endowed scholarship funds

THE NIAGARA SOCIETY

The UW-Green Bay Foundation honors donors who have made a planned gift by enrolling them in the Niagara Society. The Niagara Society is composed of individuals who have informed the Foundation they have included a provision in their financial plans to benefit the University through their estates. Donors may enroll anonymously in the Niagara Society.

Members of the Niagara Society receive invitations to special events and University updates from the chancellor and Niagara Society chairs.



Scott & Cindy Wochos

“We’ve met many alumni of the school and always admired the quality of its graduates and how well prepared they are for their chosen occupations. Including UW-Green Bay as a beneficiary of our estate was one of the most inspiring moments we’ve shared together.”

— Scott and Cindy Wochos, Niagara Society chairs

CASE STUDY

Estate Gift

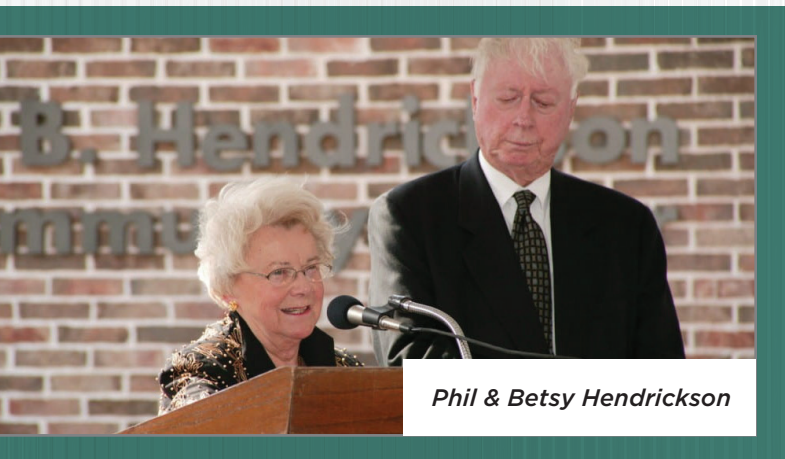
The generosity and goodwill of Phil and Betsy Hendrickson toward UW-Green Bay has been extensive in its impact and impressive in its duration.

The couple directed a significant share of their philanthropic and volunteer service toward the University during their lifetimes, and provided a thoughtful estate gift supporting two scholarships in the couple's names.

"We think it is important to reciprocate the wonderful opportunities we've been given so that other people can enjoy some of the same advantages," Betsy told the University in a 2004 article. Betsy passed away in 2013 and Phil passed away in 2017.

Higher education held great importance in their lives. Both are graduates of UW-Madison. Phil held an MBA from Harvard. Following time off raising three children, Betsy completed a master's degree at UW-Green Bay.

"We are so blessed to have both outstanding private and public opportunities for higher education in this community," said Betsy in the 2004 article. "I have a real soft spot in my heart for UW-Green Bay."



Information for Designating the Foundation in Your Estate Plan

University of Wisconsin – Green Bay Foundation, Inc.
2420 Nicolet Drive, Green Bay, WI 54311-7001
Phone: 920-465-2074
Tax Identification: #45-1600858

The staff in the office of University Advancement have many years of experience helping alumni and friends consider their planned giving options. We would be happy to help you explore how a planned gift might fit in your plans.

Please contact **Tony Werner** at **920-465-2018** or **werner@uwgb.edu** to notify the Foundation of your gift, for a confidential consultation or for more information on leaving your legacy gift.

COMMON TYPES OF PLANNED GIFTS

Bequest/Living Trust

Donors include a provision in their will directing that a gift be paid to the UW-Green Bay Foundation after their death or the death of one of their survivors. Gifts may be a specific amount of money, an item of property or a percentage of the balance remaining in their estate after taxes, expenses, and specific bequests have been paid.

Language to include in will documents

Unrestricted Purpose

I hereby give, devise and bequeath to the University of Wisconsin-Green Bay Foundation, for the benefit of UW-Green Bay, the (insert amount or percent of your estate) as an unrestricted gift to be used in the area of greatest need at the time the gift is received.

Specific Purpose

I hereby give, devise and bequeath to the University of Wisconsin-Green Bay Foundation, for the benefit of UW-Green Bay, the (insert amount or percent of your estate) to be used for (insert purpose or name of fund).

Named, Endowed Fund

I hereby give, devise and bequeath to the University of Wisconsin-Green Bay Foundation, for the benefit of UW-Green Bay, (insert amount or percent of your estate) to form an endowment fund for (insert purpose). This fund will be a permanent fund and shall be known as the (insert name of fund).

Life Insurance

When an existing life insurance policy is no longer useful, you can vest all ownership rights to the UW-Green Bay Foundation. The investment into the policy passes to the Foundation, supporting student success and programs as a charitable contribution. You also can name the Foundation as a beneficiary of a life insurance policy, including employer-sponsored benefits, as an easy way to create a planned gift at any time.

Charitable Remainder Trusts

With a charitable remainder trust, assets are transferred into a trust for a designated number of years (or for the duration of your life). Regular payments are made to you or another beneficiary for those years, and then the remaining assets are paid to the UW-Green Bay Foundation to create a permanent charitable fund.

Charitable Lead Trusts

This is a flexible plan in which assets are transferred to a trust that pays income to one or more charitable recipients. At a fixed date or at the time of death, the assets are transferred to others named by the donor.



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