



Place  
Stamp  
Here

ATTN: ROSE LEGACY SOCIETY  
UNIVERSITY OF WISCONSIN  
OSHKOSH FOUNDATION  
842 ALGOMA BLVD  
OSHKOSH WI 54901-3551



Please fold in half and tape shut.

## Create a Living Legacy — Join Us!

Friends who establish a living legacy with a planned gift by naming the University of Wisconsin Oshkosh Foundation as a beneficiary are recognized as members of the Rose Legacy Society. The society is named after Rose C. Swart, who served on the Oshkosh Normal School faculty for 51 years.

### Charter Members

Anonymous  
Mary Bayorgeon '71  
Annette Blanchette '60  
Mary Lou Broske '60  
\*Jean I. Caudle '34, '38  
Judith Derocher '62, '78  
Larry Didlo '63  
Phyllis Frederick '52  
James '69, '76 and Patricia '69 Freer  
Tara Gagne '93, '98  
David '71 and Sharon Geurden  
Carol Goff-Smith  
Lois Haskamp '46  
Marie Keefe '79  
Thomas '71 and Pamela '72 Kell  
Douglas Kline '79  
Joseph and Mary Jo Mazza  
Barry '95 and Stepheny Mulholland  
\*Jean C. Nelson '49  
Thomas '66 and Judy Pitcher  
Gail '75 and Gary '74 Pucci  
Carol Schulke  
Larry Steffes '70  
Stanley Talarek '62  
Betty Traugott '60  
Constance '69 and David '68, '70  
Van Lieshout

\*Indicates Founder

### Deceased

Doris Bloye  
Howard Broadway  
Arnold & Charlene Chalberg '59, '69  
Helen Deniger  
Patricia Koll  
Dorothy Krippner  
Eileen Moeller '64  
Jane Atwood O'Connell '34  
Norine Otradovec '58  
Daniel Raaf  
Beatrice Rake  
Elizabeth Rasmussen '48  
Elizabeth Regan  
Elizabeth Rojahn '38  
Mary Rueter '30, '47  
Orville Sherman '39  
Thelma Thompson '41, '44  
Candice Tylke '94  
Evelyn Uehling '27  
Robert Vedder  
Gary Wick '73

If you have named the UW Oshkosh Foundation as the beneficiary of a bequest, insurance policy, charitable lead or remainder trust, we would be happy to welcome you as a member. Please contact Donna O'Brien at (920) 424-7118 or obriend@uwosh.edu for more information.



FOUNDATION

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Oshkosh, WI 54901

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Oshkosh Foundation

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(920) 424-7118

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www.uwosh.edu/go/  
plannedgiving

## Thank You for Your Support

We can't say "thank you" enough to you and our other generous supporters who have helped us bring our vision and mission to life. Your support helps us ensure that UW Oshkosh is a community where students' imaginations are challenged, knowledge is gained and excellence is achieved.



Visit our Web site at [www.uwosh.edu/go/plannedgiving](http://www.uwosh.edu/go/plannedgiving) to:

Try out our new giving calculators and learn more about how a planned gift may benefit you. Read stories about how donations from supporters like you have made our mission possible.

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### Making a Difference Today

Carol completed all credits toward a doctorate degree and earned an MSW from the University of Wisconsin-Madison and a Bachelor of Arts from Miami University. She devoted her career to the development and promotion of educational programs that emphasize high-quality services strengthened by collaborative efforts.

During her tenure at UW Oshkosh, she was instrumental in creating the Collaborative MSW Program with UW-Green Bay, gaining approval for the venture from colleagues, institutional leaders and system administrators. Having previously worked and built

*Continued on inside*



# LIVING LEGACY

SPRING 2010

## Passion, Partnerships and Priorities: Carol L. Schulke Scholarship Fund Benefits Future Generations



Carol L. Schulke

Carol L. Schulke's career path led her to public and private universities as a dedicated educator in the field of social work. Following her retirement as department chairperson and associate professor of social work from the University of Wisconsin Oshkosh (UWO) in 2003, she established a revocable charitable trust. The trust is a way to create a living legacy to carry on her life's work through the Carol L. Schulke Master of Social Work (MSW) Collaboration Scholarship at the University of Wisconsin Oshkosh Foundation.

In addition to providing financial assistance to students through her scholarship, Carol challenges the perception that public universities have excess resources and do not need charitable financial support. She knows

“Carol's legacy will live on through the students she educated during her career as well as future recipients of the scholarship, which will be awarded in perpetuity through the endowed fund she has created.”

full well the growing need for support in the midst of dwindling state allocations. Leading by example, the message Carol wants to convey is clear: Support students at state schools.

## Schulke Scholarship

*Continued from front*

relationships at UWGB, she saw that the programs, principles and personnel were well-suited to create this partnership.

The program was launched in fall 2003 and became fully accredited by the Council on Social Work Education in July 2006. The MSW curriculum strives to meet the social service needs of northeastern Wisconsin and relies on input and feedback from its many constituencies to develop a program that prepares social work leaders to meet the social service needs in regional communities. Leadership of the program alternates between UWO and UWGB and representatives of both institutions serve on the selection committee. Classes are held in the Appleton area on evenings and Saturdays to best serve the needs of its geographically dispersed enrollment.

Carol's mission is to protect the purpose for which the program was created, preserve the culture of collaboration and ensure its structural integrity. She is passionate that the program endures in the collaborative spirit in which it was created. She believes it can serve as a model for other MSW programs

so they can enjoy the benefits of collaboration as well.

### Looking Ahead

Students enrolled in the MSW program through UWO or UWGB are eligible to apply for the scholarship. Carol had the foresight to anticipate the possibility of additional educational institutions joining the program in the future. Therefore, she included a provision that any student accepted and enrolled in the program be eligible to apply for this scholarship. The scholarship provides reimbursement of tuition and other essential educational expenses toward the pursuit of an MSW degree by aspiring social work professionals who intend to enhance their long-term career goals of serving children and families in the public sector.

Carol has fond memories of the students she taught — many were first-generation college students — and the sacrifices they made to pursue their education. She derives satisfaction from knowing that her gift will benefit not only future recipients of the award, but also the clients they will serve throughout their careers.

## 3 Ways To Provide a Secure Future for Your Grandchildren

It's a special privilege to help grandchildren achieve their dreams, and there are many sound financial management tools to help you do just that—some of which also help you achieve your charitable goals. Take a look at these three options and find the one that's right for your situation.

### Charitable lead trust.

The income from the trust you create and donate money or property to flows to the UW Oshkosh Foundation for a stated number of years. After that time, the assets can be distributed to your grandchildren or other individuals you choose.

### Charitable remainder trust.

After your lifetime, this trust is funded with assets you specified in your estate plan. It can provide your grandchildren with income for life. After that, the remainder in the trust will support the UW Oshkosh Foundation.

### Annual exclusion gift.

If you want to help them while you're alive, you can make a gift of up to \$13,000 to each of your grandchildren or children once a year, gift tax-free.

### FOR MORE TAX-SMART WAYS

to give to the people and organizations you love, please contact Donna O'Brien at (920) 424-7118 or [obriend@uwosh.edu](mailto:obriend@uwosh.edu).

*We would be happy to help you.*



## TEACH GRANDCHILDREN HOW TO MANAGE THEIR OWN FUTURES

Your wisdom can be just as valuable as your financial assistance. With your life lessons, your grandchildren can learn how to avoid financial pitfalls and positively impact their generation. Here are some ways to offer guidance:

Express the importance of saving.

Show them good budgeting and spending habits.

Involve them in your philanthropy.

Fold in half and tape shut with clear tape. No staples, please.

## Preserving Your Retirement Plan Assets: Techniques To Ease Your Mind

- Please send me the FREE guide, *A New Use for Your Retirement Plan Assets.*
- I've included the University of Wisconsin Oshkosh Foundation in my estate plans.
- I have a question. Please contact me by:
  - Phone; best time to call: \_\_\_\_\_ a.m./p.m.
  - E-mail.

**Thank you for supporting UW Oshkosh students!**

Please print.

Name \_\_\_\_\_

Telephone \_\_\_\_\_

E-mail \_\_\_\_\_

Address \_\_\_\_\_

City, State \_\_\_\_\_

ZIP \_\_\_\_\_

**We respect your privacy!** Information collected here will be kept strictly confidential. It will not be sold, rented, loaned or otherwise disclosed, and it will not be used in ways to which you have not consented.

## Action List

What You Can Do Today

- 1.** Contact us today or visit our Web site, [uwosh.edu/go/plannedgiving](http://uwosh.edu/go/plannedgiving), to learn more about how charitable giving can fit your life stage and situation.
- 2.** Return the reply card to receive our FREE guide, *A New Use for Your Retirement Plan Assets.*
- 3.** Set up a time to meet with your professional advisors to make sure your retirement, estate and charitable giving plans are on track.



Find out how you can create a scholarship that will make a difference in the lives of students by contacting Donna O'Brien at (920) 424-7118 or [obriend@uwosh.edu](mailto:obriend@uwosh.edu).

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