

## Legacy Gift Recognition

Donors of deferred gifts, such as bequests, life insurance policies or trusts, will be acknowledged on the Donor Board, which is permanently displayed in the hallway of UWSP at Wausau.

All bequests should be made to the UW Wausau Campus Foundation. Your attorney can help you formulate a bequest in your will or trust to satisfy your objectives.

You can establish a restricted bequest to support scholarships, a specific program or department. It would be helpful if you would consult with the executive director of the Foundation before writing the restricted bequest to ensure that the provisions can be carried out according to your wishes.

### UW Wausau Campus Foundation

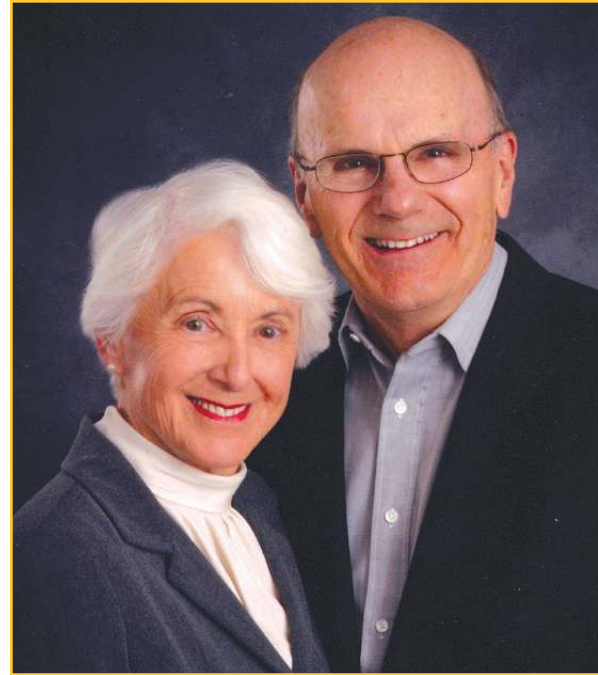
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**Mary Clare & D. J. Freeman**



“The reason we gave a legacy to the UW Wausau Campus Foundation is because we believe the UWSP at Wausau Campus stands as a beacon of the kind of high quality public education vital for a democratic republic like the United States of America to flourish. Achievement of the goal to provide adequate public and – perhaps even more so these days – private funding is essential to continue and promote a flourishing Wausau Campus! We encourage other people to foster this goal with their own personal legacy.”

– Mary Clare & D. J. Freeman



*(Our condolences to the Freeman family on the passing of Mary Clare and D. J. in 2020. The family has graciously authorized us to continue using the above statement the couple approved for our foundation to use in 2019.)*

A Legacy of  
**Caring**



Planning for the  
**Future**

Where there's a **will...**

**The University of Wisconsin-Stevens Point at Wausau is an integral part of the University of Wisconsin System.**

Several hundred students are served each semester by a talented and dedicated faculty and staff. A rigorous curriculum, small classes and personal attention provide a solid foundation for future success.

Statistics show that Wausau Campus students who go on to Wisconsin four-year institutions are among the best prepared students in the UW System. However, our students also have a higher level of financial need than those at many other 2-year campuses. While the Wausau Campus maintains its leading reputation for preparing students to graduate from college, our campus serves many students who struggle to afford a bachelor's degree. You can make a difference for them and our community.

Today's federal estate tax laws give highly favorable treatment to charitable bequests by excluding them from the federal taxable estate. Making a charitable gift through your will or trust is a wonderful way to support UWSP at Wausau and its mission long after you're gone.



Assets that may be subject to federal estate or income taxes can be directed through the UW Wausau Campus Foundation to support the tradition of excellence in education at UWSP at Wausau.

## Methods of Planned Giving

Since no other document is more personal than your will or trust, please seek professional advice when preparing it. Your attorney is a good source of advice and assistance. A trust officer at your bank, your life insurance representative, a tax professional, or a financial planner may also be able to help you ensure the wisest and most productive use of your money for the benefit of those individuals and institutions, like the UWSP at Wausau, that you care about.

there's a **way.**

**Charitable gifts may be made to the UW Wausau Campus Foundation in many ways, including:**

- **Bequests** of money, securities, personal property or real estate.
- **Charitable Remainder Trust** where you provide a lifetime income for yourself and/or other beneficiaries, but ultimately the UW Wausau Campus Foundation receives the remainder of the trust assets.
- **Charitable Lead Trust** where the UW Wausau Campus Foundation is named the beneficiary of income from the trust for a specific number of years, and ultimately, the remainder of the trust assets go to other named beneficiaries of your choice.
- **Life insurance** where the Foundation is named the irrevocable beneficiary of the policy.
- **Retirement plans** are very good assets from which to make charitable gifts. What this means is that the Foundation will receive 100 cents on the dollar while an individual will often receive significantly less because of income taxes.