

The Foundation

- ▶ assures donors that gifts will be used exclusively to enhance the UW-Marquette campus.
- ▶ provides expert management, investment and contributions for designated purposes.

Your support of the UW-Marquette Foundation, assures the UW-Marquette's tradition of quality to future students. The purpose of the UW-Marquette Foundation is to support the Marquette campus of the University of Wisconsin.

Thank you for your generous consideration of support of the UW-Marquette Foundation.

ENROLLMENT FORM

NAME _____

SPOUSE'S NAME,
IF JOINT GIFT _____

ADDRESS _____

CITY _____

STATE _____ ZIP _____

PHONE NUMBER(S) _____

Suggested language for wills

This language creates an unrestricted gift, which is especially valued because it is difficult today to anticipate the Foundation's future needs. If you have particular uses in mind for your gift, the UW-Marquette Foundation office would welcome the opportunity to work with you and your attorney on specific language to assure that your gift will be used as you intend. If you would like to remember the UW-Marquette Foundation in your will, you can do so by using the following language:

I hereby give, devise and bequeath unto UW-Marquette Foundation, 750 West Bay Shore Street, Marquette WI 54143, a Wisconsin nonprofit corporation, (the sum of \$_____) or (_____% of my estate) or (the following stock and bonds_____) or (specific items of property) or (the rest, residue, and remainder of my estate). This gift may be used to further the educational objectives of UW-Marquette in such a manner as the Board of Directors of the UW-Marquette Foundation may direct.

The full legal name of the Foundation is: UW-Marquette Foundation, Inc., a Wisconsin not-for-profit corporation located in Marquette, Wisconsin.

Please briefly describe or attach the relevant document page(s) describing your planned gift for the benefit of the UW-Marquette Foundation, Inc.



Legacy Society

**UW-Marquette
Foundation, Inc.**

750 Bay Shore Street
Marquette, WI 54143
715-735-4339
Fax: 715-735-4304

UW-MARINETTE FOUNDATION LEGACY SOCIETY

We extend to you an invitation to join the UW-Marquette Foundation Legacy Society. The Legacy Society is a program designed to build long-range financial stability for the University of Wisconsin-Marquette. Through the Legacy Society you can include UW-Marquette in your future plans. By doing this now, the possible tax advantages to you can increase the value of your estate, enabling you to do much more than you ever dreamed possible.

Qualifications for Membership in the UW-Marquette Foundation Legacy Society

Any individual or couple who include the UW-Marquette Foundation in their estate plan will qualify for membership in the UW-Marquette Foundation Legacy Society.

A well-planned will is important for everyone. There are many personal issues to take into consideration, such as providing appropriately for your family or a charity. Through careful planning, you can maximize the impact of your assets and ensure that they will be distributed according to your wishes. At the same time, you will have the opportunity to support those endeavors which are most important to you and have the satisfaction of realizing philanthropic wishes during your lifetime.



Membership in the Legacy Society may be accomplished in one or more of the following ways

- A. By making a bequest, by revising an existing will, or making a new one directing a percentage, fixed amount, or contingency statement which will direct an eventual gift to the UW-Marquette Foundation.
- B. By naming the UW-Marquette Foundation as a primary or secondary beneficiary of a new or existing insurance policy.
- C. By creating a Charitable Remainder Unitrust, Annuity Trust, Pooled Life Income Agreement, Charitable Gift Annuity, Charitable Lead Trust, Life Estate, Life Insurance or bank deposit eventually directing all or a portion to the principal or earnings to the UW-Marquette Foundation.

Your support through one or more of the above plans can be made through a gift or bequest of money, land, stock, life insurance, copyright, oil rights, letter stock, restricted stock, or an undivided fractional interest to the UW-Marquette Foundation.

IN RECOGNITION OF YOUR GENEROSITY

As an expression of our appreciation UW-Marquette Foundation Legacy Society members:

- ◆ have access to the services of nationally known consultants who are experts in the field of planned charitable giving and estate taxes;
- ◆ are acknowledged in all UW-Marquette Foundation Legacy Society publications;
- ◆ have the opportunity to be members of a large endowment program. Recognition for this endeavor will be permanently reviewed in years to come beyond the donor's lifetime.
- You may publish my name as a member of the UW-Marquette Foundation Legacy Society.
- I prefer to remain anonymous.

SIGNATURE: _____

DATE: _____