University of Wisconsin-Madison

- Recognized in the Top 25 of world universities
- Among top 5 in federal research expenditures ($1.2B)
- 4th in production of S&P 500 CEOs
- 1st for Peace Corp volunteers
- Big is Beautiful!

  - Full range of programs: liberal arts, professional schools, agriculture college, health sciences and affiliated research institutions
  - 21,727 employees
  - 43,275 students
  - 414,627 alumni
Fall 2014 New Freshman Students

At least one student from 71 of 72 WI counties
Top Five Counties: Dane, Waukesha, Milwaukee, Brown, Outagamie

At least one student from 46 different states
Top Five States: Wisconsin, Minnesota, Illinois, California, New York

At least one student from 42 different countries
Top Five Countries: China, India, Korea, Malaysia, Thailand
UW Research: A Few Examples

• Advancing Wellness: Center for Investigating Healthy Minds
• Attacking Cancer: Carbone Cancer Center
• Building State of the Art Electronics: College of Engineering
• Improving Global Health: Global Health Institute
• Advancing Early Detection and Prevention of Alzheimer’s Disease: Wisconsin Alzheimer’s Institute
Development Priorities

• **Faculty Excellence:** Resources to recruit and retain outstanding faculty will determine UW’s future reputation, ability to attract research grants, and educational quality.

• **Supporting Students:** Ensure UW is accessible to qualified students regardless of financial background is core to mission and vital to maintaining socioeconomic diversity on campus.

• **Enhancing Students’ Wisconsin Experience:** Provide modern learning environment, robust career preparation, expanding international experience, etc.

• **Expanding the Boundaries of Knowledge to Address World Problems:** Build upon deep expertise in vital areas like health and well-being, energy and sustainability, entrepreneurship, big data and computation and more.
Our goal is to benefit the University of Wisconsin – Madison by assisting those who are interested in providing financial support to UW via one of our gift planning vehicles.
The Importance of Gift Planning

- **2013**: $50.8 MM (23%)
  - New Def. Pledge Amounts and Received Irrevocable Gifts
- **2012**: $86.7 MM (43%)
  - Total New Gifts/Pledges to UWF
- **2011**: $37.4 MM (26%)
- **2010**: $11.4 MM (12%)
Bequests

Gift of property or money promised in your will to a person or organization upon your death.
Bequests

Specific will language is needed, but customized wording can be provided:

“I hereby give, devise and bequeath to the University of Wisconsin Foundation, a nonprofit, non-stock Wisconsin corporation with its principal office in Madison, Wisconsin, __________ of the rest, residue and remainder of my estate to be used for ________________ at the University of Wisconsin – Madison...”
Blended Giving

Outright gift(s) during donor’s lifetime
+
Larger gift through donor’s estate

= Huge impact
+
Ability to see that impact during lifetime
Other Charitable Beneficiary Designation Options

Retirement Plans
Investment Accounts
Life Insurance Policies
Charitable Gift Annuity

Immediate gift in exchange for fixed income and tax deduction.

Variations:

Deferred Gift Annuity
Flexible Gift Annuity
Charitable Remainder Unitrust

Immediate gift in exchange for income and a tax deduction.
Charitable Lead Trust

Immediate gift provides annual distributions to charity for a term of years after which the remainder is transferred to an individual.
Real Estate and other Property

While some restrictions apply, real estate and other property items can be given as charitable contributions.
Sharing your Intentions

Information will be held as anonymously as you would like.

Any information shared is non-binding.

Recording intentions ensures the gift will be directed appropriately when received many years from now.
- Honors individuals who have made a commitment to support UW-Madison through a deferred gift.

- Currently just over 1,500 members

- No minimum commitment or formal documentation required.

- Members receive a certificate, picture frame, special mailings, and recognition at certain events.
The Gift Planning Team

Scott McKinney - Vice President

Niki Graham - Senior Director

Linda Halsey - Associate Vice President

Colin Nemeth - Director

Cathy Webb - Senior Director

Andrea Stoffel - Program Manager
Thank You!

For more information:
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