

VISIONS

UNIVERSITY OF WISCONSIN-MILWAUKEE



"POOR GRAD STUDENT" MAKES SIX-FIGURE PLANNED GIFT TO UWM

Despite the fact that UWM was not Dr. Elizabeth Harrison's first choice for graduate school, she has become one of the university's most passionate and devoted supporters. An annual fund donor since 1992, Dr. Harrison has also recently confirmed her plans to leave one-half of her estate to the UWM Foundation for the benefit of the College of Nursing.

"I wanted to go to school in New York City," says Dr. Harrison, who soon realized that UWM's connection to the state system and the great reputation of the college's nursing faculty created a better option for her advanced nursing degrees. Completing her master's from UWM in 1991, she continued on to earn her doctorate in 1999.

Dr. Harrison considered herself a "poor grad student" when she began donating to the University through the annual fund. "The first time I was asked to contribute, the student caller asked me if I could give \$25—period," she recalls. "I was a poor grad student at the time, but it was a more reasonable request than other schools had made, and so began the tradition." Today, she feels the transformational effect of giving back to UWM is more important than ever because it helps empower current and future students with "very special teachers and a wonderful learning environment."

In addition to giving annually at the \$1,000-plus Chancellor's Society level, Dr. Harrison has also notified us that she has included UWM in her estate



Dr. Elizabeth Harrison

"I have always given careful thought to the beneficiary of my retirement accounts and other investments. My father died young and that helped me realize the importance of what we leave behind."

—Dr. Elizabeth Harrison

plans—to receive a six-figure gift! Because she informed us of her intent, Dr. Harrison is now a member of the UWM Chapman Society. She says, "I have always given careful thought to the beneficiary of my retirement accounts and other investments. My father died young and that helped me realize the importance of what we leave behind."

Dr. Harrison hopes that her ongoing commitments to UWM's annual fund and as a planned giving donor will inspire others to do the same. "I was raised to believe that anyone fortunate enough to earn a good income has a responsibility to give part of that income away," she says. "Most of us have a much better income than we are willing to admit! I think giving is like saving, and as your salary increases you should both save more and give more."

LAST-CHANCE OPPORTUNITY

If You Are Age 70½ or Older, You Can Use Your IRA To Make A Gift to UWM—But Only Until December 31, 2007

Under the Pension Protection Act of 2006, you can make a gift to the UWM Foundation using funds from your individual retirement account (IRA) without incurring tax consequences. Make your contribution by simply contacting your IRA plan administrator—the transfer is not included in your taxable income and is not tax deductible.

To be eligible, you must meet these guidelines:

- You are age 70½ or older.
- The gifts total \$100,000 or less.
- You complete the donation on or before December 31, 2007.
- You transfer funds directly from an IRA or Rollover IRA.
- You transfer the gifts outright to one or more public charities.

Please call us to find out more about this opportunity that enables you to witness the far-reaching benefits of your generosity.

Giving made easy

The best gift you can give yourself is to have an up-to-date will. The easiest way to support UWM is to include us in your will. For answers to your questions on wills, send for our FREE brochure by returning the enclosed reply card.

The Pension Protection Act of 2006 allows you to make direct transfers from your IRA to the UWM Foundation without tax complications. Take advantage of this unique opportunity now—before it expires!



THE UWM FOUNDATION A TRUSTWORTHY PARTNER FOR 33 YEARS

When the inaugural leadership of the UWM Foundation first created the organization in 1974, they did so with a confidence that philanthropic friends of higher education would come to see UWM as a trustworthy partner in addressing the issues donors feel are vital to our community. Today, with over \$119 million in total assets and growing, that theory has more than proven to be true. Alumni, faculty and staff, corporations and foundations, and other friends of UWM have given generously to help our institution create sustainable change for all who come here seeking to learn, research, create, innovate, and transform themselves and the world.

Some donors, such as the two we've profiled in this issue of *Visions*, choose to give unrestricted gifts to UWM's general fund or that of the library, athletics, or their favorite school or college. These gifts allow our chancellor, deans, and program directors to direct the funds to our most pressing needs. In some cases, these contributions are used for scholarships, research stipends, learning opportunities, or seed funds for a particular project.

Other donors have a specific area of interest in which they would like to make a difference. In past issues of *Visions*, we have profiled a number of generous UWM supporters who are partnering with us through estate gifts to establish program-specific funds. Endowed scholarships, either university-wide or in a chosen school or college, are a popular choice among UWM alumni donors. Other planned gifts establish funds to support research, professorships, capital improvements, foreign study and other programs.

It is the combination of UWM's dynamic student body, diverse educational pursuits, outstanding leadership, successful investments



If you have been contemplating a major or planned gift to the UWM Foundation, please call us or return the enclosed reply card for more information.

and vision for tomorrow that makes us a partner of choice for donors. They see that the opportunities to make a significant difference through a major or planned gift to the UWM Foundation are as vast as our university is diverse.

If you have been contemplating a major or planned gift to the UWM Foundation, please call one of our development professionals listed on the last page of this newsletter, or mail in your reply card today. We would be delighted to help translate your personal vision for the future and show you how UWM can help you achieve your goals.



♻️ Recycled paper

© University of Wisconsin—Milwaukee and The Stelter Company

The information in this publication is not intended as legal advice. For legal advice, please consult an attorney. Figures cited in examples are based on current rates at the time of printing and are subject to change.

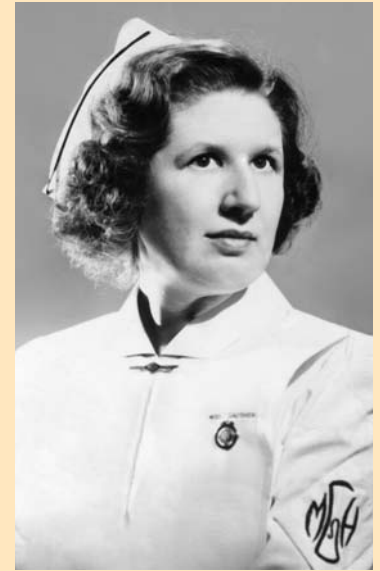
References to estate and income tax include federal taxes only; individual state taxes may further impact results.

RETIRED PROFESSOR LEAVES \$300,000 BEQUEST TO COLLEGE OF NURSING

Claire Gauthier was born in Winnipeg, Canada, in 1913. She came to the United States in the 1950s to attend college—first at the School of Public Health at the University of Minnesota in St. Paul and later at Milwaukee’s Marquette University, where she earned her master’s degree in teaching. She later became an American citizen.

Claire worked as a nurse at St. Mary’s Hospital and eventually came to be a professor of nursing at UWM. Her colleagues and students universally liked and respected her. Former College of Nursing Dean Norma Lang says, “Claire Gauthier was a most thoughtful and scholarly person. Often after much discussion in a group, Claire would offer the most clear and succinct explanation or proposal. And everyone listened carefully to her quiet but eloquent comment, which she could deliver in English or French.”

Claire retired in 1977. She lived for many years in Wauwatosa and spent her final years as a resident of St. Camillus Health Care Center. She passed away peacefully on March 2, 2006. It was only upon her passing that the college learned that she had included a significant, unrestricted bequest to the College of Nursing in her estate plans.



Claire Gauthier

Make a difference in our future by including the UWM Foundation in your estate plans today.

Call us for more information.

Directors of Major and Planned Giving

Stephanie Ackerman
(414) 229-3018
ackerman@uwm.edu

Anne Panter
(414) 229-3296
anpanter@uwm.edu

Eric Anderson
(414) 229-3016
eric@uwm.edu

Jennifer Clearwater
(414) 229-3175
jenwater@uwm.edu



Office of Development
Hester Conference Center
3271 N. Lake Drive
Milwaukee, WI 53211
Fax: (414) 229-6930
www4.uwm.edu/giving