



An Introduction to Including a Gift for the UW-Platteville Foundation in Your Estate Plan

The value and far-reaching effects of planned gifts can never be underestimated. Few honors are greater to the UW-Platteville Foundation than the inclusion of the Foundation in your estate plan. This type of future support will help ensure that the UW-Platteville will be able to provide students with an innovative education of the highest quality for years to come. The following information offers a brief introduction to making a gift through your will or revocable trust.

Sample language to share with your attorney:

- *I give, devise, and bequeath to the UW-Platteville Foundation (Federal tax ID #39-6051705), a nonprofit Wisconsin charity, located at 1 University Plaza, Platteville, Wisconsin, the sum of \$_____ (or _____ percent of my estate or _____ percent of the residue of my estate) to be used for such purposes as the Foundation Board determines at the time this bequest becomes effective.*

Will or trust provisions may be designated for a specific purpose—such as scholarship funds, faculty development, or support for specific academic departments.

Donors who wish to restrict or designate a use for their gifts are encouraged to contact the UW-Platteville Foundation Development Office to ensure that the university understands the donor's wishes.

In the case of a restricted bequest, we suggest additional language that would give the university flexibility to use the bequest for some other purpose in the event that the project or purpose designated by the donor is no longer needed or obsolete when the estate plan is realized. Adding the following sentence to the end of the bequest provision would provide this flexibility:

- *If, at any time after this bequest becomes effective, the funds are not needed or cannot be used for this purpose, then the Foundation Board may direct the funds to be used for a purpose as closely related as possible to the original purpose described in this provision.*

If you have any questions or would like more information about including the UW-Platteville Foundation in your estate plan, please contact Joshua Boots, Executive Director at UW-Platteville, 1 University Plaza Platteville, Wisconsin 53818. Josh's direct line is 608.342.3961. His e-mail is bootsj@uwplatt.edu.