

GIFTS BY WILL

There are a number of ways in which an individual may choose to support the University, including gifts from their estate and/or a trust. The following are suggested language for some of these situations. You may always contact the gift planning staff at the University of Wisconsin Foundation for more specific situations. You may reach them in any of the following ways:

University of Wisconsin Foundation
Office of Gift Planning
1848 University Avenue
PO Box 8860
Madison, WI 53708-8860
Telephone: (608) 263-4545
Facsimile: (608) 263-0781
General email: uwf@uwfoundation.wisc.edu

GIFTS FOR UNRESTRICTED SUPPORT OF THE UNIVERSITY OF WISCONSIN – MADISON:

I hereby give, devise and bequeath to the University of Wisconsin Foundation, a non-profit, non-stock Wisconsin corporation with principal offices in Madison, Wisconsin _____ percent (_____%) of the rest, residue and remainder of my estate (or, alternately, the sum of \$ _____) for the unrestricted benefit of the University of Wisconsin-Madison.

GIFTS TO CREATE A PERMANENT ENDOWMENT FUND FOR UNRESTRICTED SUPPORT OF THE UNIVERSITY OF WISCONSIN – MADISON:

I hereby give, devise and bequeath to the University of Wisconsin Foundation, a non-profit, non-stock Wisconsin corporation with principal offices in Madison, Wisconsin _____ percent (_____%) of the rest, residue and remainder of my estate (or, alternately, the sum of \$ _____) to create a permanent endowment fund that should be invested and managed according to the Foundation's standard procedures for such funds. The fund should be named the _____ Endowment Fund and any distributable amounts from this fund should be used for the unrestricted benefit of the University of Wisconsin-Madison.

GIFTS TO CREATE A PERMANENT ENDOWMENT FUND FOR UNRESTRICTED SUPPORT OF A DIVISION OF THE UNIVERSITY OF WISCONSIN – MADISON:

I hereby give, devise and bequeath to the University of Wisconsin Foundation, a non-profit, non-stock Wisconsin corporation with principal offices in Madison, Wisconsin _____ percent (_____%) of the rest, residue and remainder of my estate (or, alternately, the sum of \$_____) to create a permanent endowment fund that should be invested and managed according to the Foundation's standard procedures for such funds. The fund should be named the _____ Endowment Fund and any distributable amounts from this fund should be used for the unrestricted benefit of the ____ (Insert the appropriate name of the College, School or Division) ____ at the University of Wisconsin-Madison. Should the purpose for which the Fund is instituted become impossible to perform or impractical to the extent that the Foundation is unable to use the support generated by the Fund under the existing terms for five (5) consecutive years, and if, at that time it is impossible or impractical to consult on a modification of the Fund terms with the Donors' surviving family members, the Foundation, through a resolution passed by its Board of Directors, may devote the Fund to other purposes as close to the Donors' original intent as it can at that time devise. In any such modification, the fund shall remain a permanent endowment fund and continue to use the name identified in this provision.

GIFTS TO CREATE A PERMANENT ENDOWMENT FUND FOR THE SUPPORT OF NEED BASED UNDERGRADUATE STUDENT SCHOLARSHIPS AT THE UNIVERSITY OF WISCONSIN – MADISON:

I hereby give, devise and bequeath to the University of Wisconsin Foundation, a non-profit, non-stock Wisconsin corporation with principal offices in Madison, Wisconsin _____ percent (_____%) of the rest, residue and remainder of my estate (or, alternately, the sum of \$_____) to create a permanent endowment fund that should be invested and managed according to the Foundation's standard procedures for such funds. The fund should be named the _____ Endowment Fund and any distributable amounts from this fund should be used to fund need-based scholarships for undergraduate students in any area of study at the University of Wisconsin-Madison. Should the purpose for which the Fund is instituted become impossible to perform or impractical to the extent that the Foundation is unable to use the support generated by the Fund under the existing terms for five (5) consecutive years, and if, at that time it is impossible or impractical to consult on a modification of the Fund terms with the Donors' surviving family members, the Foundation, through a resolution passed by its Board of Directors, may devote the Fund to other purposes as close to the Donors' original intent as it can at that time devise. In any such modification, the fund shall remain a permanent endowment fund and continue to use the name identified in this provision.

GIFTS TO CREATE A PERMANENT ENDOWMENT FUND FOR THE SUPPORT OF UNDERGRADUATE STUDENT SCHOLARSHIPS IN A PARTICULAR DIVISION OF THE UNIVERSITY OF WISCONSIN – MADISON:

I hereby give, devise and bequeath to the University of Wisconsin Foundation, a non-profit, non-stock Wisconsin corporation with principal offices in Madison, Wisconsin _____ percent (_____%) of the rest, residue and remainder of my estate (or, alternately, the sum of \$_____) to create a permanent endowment fund that should be invested and managed according to the Foundation's standard procedures for such funds. The fund should be named the _____ Endowment Fund and any distributable amounts from this fund should be used to fund scholarships for undergraduate students in the Department of _____ in the _____ (Insert the appropriate name of the College, School or Division) at the University of Wisconsin-Madison. Should the purpose for which the Fund is instituted become impossible to perform or impractical to the extent that the Foundation is unable to use the support generated by the Fund under the existing terms for five (5) consecutive years, and if, at that time it is impossible or impractical to consult on a modification of the Fund terms with the Donors' surviving family members, the Foundation, through a resolution passed by its Board of Directors, may devote the Fund to other purposes as close to the Donors' original intent as it can at that time devise. In any such modification, the fund shall remain a permanent endowment fund and continue to use the name identified in this provision.

GIFTS TO CREATE A PERMANENT ENDOWMENT FUND FOR THE SUPPORT OF GRADUATE STUDENT AWARDS AT THE UNIVERSITY OF WISCONSIN – MADISON:

I hereby give, devise and bequeath to the University of Wisconsin Foundation, a non-profit, non-stock Wisconsin corporation with principal offices in Madison, Wisconsin _____ percent (_____%) of the rest, residue and remainder of my estate (or, alternately, the sum of \$_____) to create a permanent endowment fund that should be invested and managed according to the Foundation's standard procedures for such funds. The fund should be named the _____ Endowment Fund and any distributable amounts from this fund should be used to fund financial assistance awards for graduate students in any area of study at the University of Wisconsin-Madison. Should the purpose for which the Fund is instituted become impossible to perform or impractical to the extent that the Foundation is unable to use the support generated by the Fund under the existing terms for five (5) consecutive years, and if, at that time it is impossible or impractical to consult on a modification of the Fund terms with the Donors' surviving family members, the Foundation, through a resolution passed by its Board of Directors, may devote the Fund to other purposes as close to the Donors' original intent as it can at that time devise. In any such modification, the fund shall remain a permanent endowment fund and continue to use the name identified in this provision.

GIFTS TO CREATE A PERMANENT ENDOWMENT FUND FOR THE SUPPORT OF GRADUATE STUDENT FINANCIAL AWARDS IN A PARTICULAR DIVISION OF THE UNIVERSITY OF WISCONSIN – MADISON:

I hereby give, devise and bequeath to the University of Wisconsin Foundation, a non-profit, non-stock Wisconsin corporation with principal offices in Madison, Wisconsin _____ percent (_____%) of the rest, residue and remainder of my estate (or, alternately, the sum of \$_____) to create a permanent endowment fund that should be invested and managed according to the Foundation's standard procedures for such funds. The fund should be named the _____ Endowment Fund and any distributable amounts from this fund should be used to fund financial awards for graduate students in the Department of _____ in the _____ (Insert the appropriate name of the College, School or Division) _____ at the University of Wisconsin-Madison. Should the purpose for which the Fund is instituted become impossible to perform or impractical to the extent that the Foundation is unable to use the support generated by the Fund under the existing terms for five (5) consecutive years, and if, at that time it is impossible or impractical to consult on a modification of the Fund terms with the Donors' surviving family members, the Foundation, through a resolution passed by its Board of Directors, may devote the Fund to other purposes as close to the Donors' original intent as it can at that time devise. In any such modification, the fund shall remain a permanent endowment fund and continue to use the name identified in this provision.

GIFTS TO CREATE A PERMANENT ENDOWMENT FUND FOR THE SUPPORT OF FACULTY (PROFESSORSHIPS AND/OR CHAIRS) IN A PARTICULAR DIVISION OF THE UNIVERSITY OF WISCONSIN – MADISON:

I hereby give, devise and bequeath to the University of Wisconsin Foundation, a non-profit, non-stock Wisconsin corporation with principal offices in Madison, Wisconsin _____ percent (_____%) of the rest, residue and remainder of my estate (or, alternately, the sum of \$_____) to create a permanent endowment fund that should be invested and managed according to the Foundation's standard procedures for such funds. The fund should be named the _____ Endowment Fund and any distributable amounts from this fund should be used to fund faculty support in the Department of _____ in the _____ (Insert the appropriate name of the College, School or Division) _____ at the University of Wisconsin-Madison. It is the intention that these funds should be used to recruit and retain the best and brightest faculty at the University and depending on the size of the gift, the awards may be referred to a faculty support funds, a professorship, or a chair. Appointments should be made by the usual process currently in place at the University at any given time. Should the purpose for which the Fund is instituted become impossible to perform or impractical to the extent that

the Foundation is unable to use the support generated by the Fund under the existing terms for five (5) consecutive years, and if, at that time it is impossible or impractical to consult on a modification of the Fund terms with the Donors' surviving family members, the Foundation, through a resolution passed by its Board of Directors, may devote the Fund to other purposes as close to the Donors' original intent as it can at that time devise. In any such modification, the fund shall remain a permanent endowment fund and continue to use the name identified in this provision.