



ESTATE AGREEMENT

JOHN & JANE DOE FAMILY SCHOLARSHIP ENDOWMENT

THIS ESTATE AGREEMENT is made by John & Jane Doe and the UW-Whitewater Foundation, Inc., (Foundation) a not for profit and non-stock Wisconsin Corporation.

WHEREAS, the donor(s) wishes to start a fund with the Foundation to be called the John & Jane Doe Scholarship for the purpose of enhancing the College of Letters and Sciences by aiding UW-Whitewater students pursuing a major in the College of Letters and Sciences, who have an interest in a teaching career.

WHEREAS, the donor(s) wish to fund this scholarship through any and all proceeds from their estate.

WHEREAS, the fund is to be managed and invested by the Foundation as a permanent endowment fund in accord with the Foundation's policy and procedures regarding endowment investments and distributions which may exist and be altered from time to time;

THEREFORE, the Foundation agrees to receive, hold, invest, reinvest, administer and distribute any and all monies received for the described Fund in accord with the following terms and conditions.

1. Each year the Foundation will advise the scholarship committee of the College of Letters and Sciences of the total amounts of support available for distribution in support of the Fund's objectives.
2. The College of L&S shall use annual distributions as specified by the donor(s).
3. All monies distributed from the named endowed Fund shall be described as having been made available by the Fund along with any other stipulations agreed to with the donor(s) in advising awardees information concerning the reasons the donor(s) created the Fund.

4. Added contributions to the Fund by the donor(s), or any others, whether by gift, devise, trust or bequest, may be accepted at any time with Foundation approval.
5. During the lifetime of the donor(s), the donor(s) have the right to alter the purpose and/or terms of the Fund created by this agreement with the understanding that the change(s) made will fit the use and mission of the University of Wisconsin-Whitewater or any of its Colleges, Departments, Divisions or Offices.

In making this gift it is the intent of the donor(s) to supplement those activities that would normally be construed as the province and responsibility of the State of Wisconsin and its agencies. The support distributed by the Foundation is intended to be incremental in nature in order to provide a standard of excellence in support of the goals and objectives noted in this agreement.

Executed this _____ day of _____, _____

APPROVAL BY:

Name

Name

UW-Whitewater Foundation, Inc.

BY:

Jonathan C. Enslin
President