



WILL AND ESTATE GIVING CHECKLIST

- Fill out and return a Letter of Intent to UW-Whitewater Foundation, Inc. (Foundation)
 - If you already have a will, direct your attorney or estate planner to add a codicil outlining your decision to support the Foundation.
 - If you are just beginning to create a will, provide your attorney or estate planner with your goals in supporting the Foundation.
 - Provide a copy of the specific provisions of your will or estate plan to benefit the Foundation. There is no requirement that you provide the entire will or estate plan.

- Contact a staff member from the Foundation to answer any questions you may have to ensure that your specific philanthropic goals are achieved.
 - Your gift will support the University's highest needs or priorities.
 - If you choose to direct your gift to a specific scholarship or program, complete a Gift Agreement.
 - We can assist you in detailing exactly how your gift is to be utilized in a Gift Agreement. This document provides a pathway for how UW-Whitewater implements your donation. This is especially important if you decide for your gift to support a scholarship, program or a specific use. It is also beneficial when you wish to create a named endowed fund.
 - Once signed by you and the Foundation, Gift Agreements may be altered without having to consult an attorney to revise your will or codicil.

- Consider adding UW-Whitewater Foundation, Inc. directly to your beneficiary designation for your retirement fund (IRA, Roth-IRA, 403B, etc.).

- Provide information on any Life Insurance policies that you wish to be directed to UW-Whitewater Foundation, Inc.
 - A donor may make an irrevocable gift of an existing policy that is fully paid for.
 - Donors may make the gift of a policy that requires additional annual premiums.
 - UW-Whitewater Foundation, Inc. may simply be named as a beneficiary of a policy that the donor continues to own and pay for.

Please Note:

Our full legal name is: UW-Whitewater Foundation, Inc. Our federal EIN number is 39-6081189. The UW-Whitewater Foundation, Inc. is a 501(c)(3) organization.