

Providing for Wittenberg's Future: Charitable Bequests

The present is the best time to think about your future. Proper planning is a way to preserve and emphasize your values through your will or estate plan, while ensuring that your family and loved ones are taken care of. Many donors report that planning can be a very rewarding experience.

There are many reasons why you might consider making a charitable gift as part of your legacy planning. A bequest is perhaps the easiest and most tangible way to leave a lasting impact on the people and places that are most meaningful to you, such as the work and academic mission of Wittenberg University. There is no better way to provide a perpetual legacy for you, your family, or someone you admire than by providing critical resources to support an institution that is important to you.

Wittenberg appreciates estate gifts that are unrestricted and allow the university to meet the university's current and evolving needs. Gifts to Wittenberg's endowment provide annual income that can permanently replace your annual support. Additionally, gifts can be made to specific areas of campus that are important to you – we can help you accomplish this.

THE DAVID HAWLEY ASSOCIATES LEGACY SOCIETY

In 1871, David Hawley made the first planned gift to the university, establishing a charitable annuity with Wittenberg. His gift transferred property on the northern edge of campus where the original fieldhouse and football stadium now sit.

The David Hawley Associates Legacy Society recognizes the many alumni and friends who have provided for Wittenberg as part of their estate plans. You are invited to join this prestigious society of committed investors and be included among the many others who have left a legacy at Wittenberg through their own legacy plans. We know that estate planning is a very personal endeavor and keep any revelations of estate gifts in the strictest confidence.

SAMPLE BEQUEST LANGUAGE

We have provided some basic bequest language to assist you and your attorney. If you have questions, need further information, or wish to establish an endowed fund through your legacy gift, please contact us so that we can support you in your planning.

1. Bequest of a specific dollar amount

"I hereby, give, devise and bequeath [\$Dollars] to Wittenberg University, a nonprofit organization located at P.O. Box 720, Springfield, OH 45501-0720, Federal Tax ID: 31-0537177, for Wittenberg University's general use and purposes."

2. Bequest of percentage of an estate

"I hereby, give, devise and bequeath [Percentage of Your Estate] to Wittenberg University, a nonprofit organization located at P.O. Box 720, Springfield, OH 45501-0720, Federal Tax ID: 31-0537177, for Wittenberg University's general use and purposes."

TYPES OF BEQUESTS

A bequest may be made in several ways:

- Gift of a dollar amount
- Gift of a percentage of your estate
- Naming Wittenberg the beneficiary of a retirement asset like an IRA or 401(k)
- Gift of a specific asset
- Gift of the residue of your estate

IS WITTENBERG ALREADY INCLUDED IN YOUR PLANS?

SHARING THIS INFORMATION WITH US WILL:

- Help secure Wittenberg's future
- Ensure that Wittenberg can properly execute your charitable interests, when the time comes
- Allow Wittenberg to clarify any questions or further documentation about your wishes
- Provide Wittenberg the opportunity to recognize your thoughtfulness
- Demonstrate alumni commitment to other Wittenberg stakeholders
- Inspire others to establish their own Wittenberg legacy

Wittenberg University (federal tax ID number 31-0537177) is an Ohio nonprofit corporation exempted from federal income tax as a 501(c)(3) publicly supported charity. Wittenberg University does not provide legal, tax, or financial advice. When considering planning matters, seek the advice of your own legal, tax, or financial professionals.

OFFICE OF PLANNED GIVING

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Physical Address: 234 W. Ward Street · Springfield, OH 45501

Campus Address: Bayley Alumni House