



## *Join our Legacy Society*

**Join the Legacy Society** – by making a planned gift to help sustain Leadership Wisconsin & the future of leadership development.

*A planned gift provides for sound fiscal planning for you and Leadership Wisconsin. It's a way of bringing the present into the future.*

The Legacy Society is a special group that recognizes individuals who provide support for Leadership Wisconsin through planned gifts.

Planned giving is a win-win situation, benefitting both the giver and the receiver. A popular type of planned gift is a bequest, but there are many other options, including gifts that can minimize or eliminate federal estate and gift taxes. Planned giving is easier than you might think.

### ***Read why others have chosen to become a member of the Legacy Society***

Membership in the Legacy Society belongs to those who have made a planned gift to Leadership Wisconsin (or formerly Wisconsin Rural leadership Program) or have informed our office of the inclusion of a provision for LW/WRLP in their estate plans through one or more of the following examples: There are several types of planned gift options available to you. Learn more about some of these in [\*\*Answers to Frequently Asked Questions about Planned Giving.\*\*](#)

- Life insurance policy beneficiary designation.
- Retirement plan beneficiary designation.
- Bequest –provision in a will or revocable trust.
- Life income gift (charitable gift annuity, pooled income fund, charitable remainder trust or charitable lead trust).
- Life estate gift (remainder interest in real property).

**To become a member of the Legacy Society**, simply notify the Leadership Wisconsin office of your intentions. We will follow-up and meet with you, provide sample bequest language for inclusion in your will or trust that meets your philanthropic and financial goals.

# Join our Legacy Society

One optional benefit of membership is the listing of your name on the official Leadership Wisconsin Legacy Society Honor Roll, which is published from time to time in connection with special events and annual publications. Often this will spur other people to consider a planned gift, too. If you prefer to remain anonymous, we are happy to honor your wishes. Members of the Legacy Society share a strong common bond of generosity and visionary leadership, nourishing the Leadership Wisconsin (formerly Wisconsin Rural Leadership Program) continued success.

We welcome the opportunity to recognize those who are helping to make our future possible. To declare your intentions, fill out the **Legacy Society Declarations Form**. For more information regarding the Legacy Society, please contact Linda Murray by telephone at (608) 890-1026 or by email at [linda.murray@uwex.edu](mailto:linda.murray@uwex.edu)

## Bequests

When you decide to leave assets to charity in your will you are making a bequest. Your estate will receive a charitable estate tax deduction upon your death, when the gift is made to charity. There are several different kinds of bequests, including:

### Specific bequest

You can name **Leadership Wisconsin** as the direct beneficiary of a stated amount of money, a particular piece of property, or a stated percentage of your estate.

### Residuary bequest

You can designate Leadership Wisconsin to receive all or a portion of the remainder of your estate once all specific bequests (to family and friends) have been satisfied.

### Contingent bequest

Often, individuals provide that assets should go to family members or friends. However, it is important to provide for a contingent beneficiary to receive assets in case your named individual beneficiaries do not survive you.

### Sample bequest language

I hereby give, devise and bequeath to Leadership Wisconsin (formerly Wisconsin Rural Leadership Program) , a 501c3 non-profit, non-stock Wisconsin Corporation with its principal offices in Madison, Wisconsin, the sum of \$\_\_\_\_\_ dollars. It is understood that my gift will be deposited into the general fund of Leadership Wisconsin, whose purpose is to fund the programming and operation of Leadership Wisconsin.

## Legal Designation:

The proper legal name to be used when you include Leadership Wisconsin in your plan is:  
Leadership Wisconsin

UW- Extension

610 Langdon Street, Room 331

Madison, Wisconsin 53703