

MEMBERSHIP



WHAT ARE THE BENEFITS OF MEMBERSHIP?

The Franciscan Circle Legacy Society members receive:

1. Regular communication from the university to keep members updated including a bi-annual newsletter from our president updating you on the state of the university.
2. End of the year brochure highlighting the impact our supporters have on our students helping them achieve their career goals.
3. An aerial photo of campus with an inscription indicating membership in the Franciscan Circle Legacy Society.
4. An invitation to events on campus like the Festival of Lights and Carols, or two tickets to a Fine Arts performance or an athletic event.



The **Franciscan Circle**, as a society was established to recognize thoughtful members of the Viterbo University community who have made bequests or other planned gifts to the university. Members of the Franciscan Circle join the Franciscan Sisters of Perpetual Adoration in furthering the knowledge and traditions of the university's mission—service to others—for future generations of Viterbo students. Planned gifts are an investment of faith in Viterbo University and the university is grateful and honored to be entrusted with it.



**Viterbo University
Advancement Office**
900 Viterbo Drive
La Crosse, WI 54601
(608) 796-3078
www.viterbolegacy.com

All gifts to Franciscan Circle shall comply with the prevailing guidelines of the Viterbo University Gift Acceptance policy.



**VITERBO
UNIVERSITY**



**Define Your
Legacy Today
through the
Franciscan Circle**

A planned gift is more than an act of generosity; it is a commitment that is created now for the future benefit of Viterbo University.

ALUMNUS



“My whole family started at Viterbo University. I have great memories of my time there. I even returned 25 years later for a master’s degree in servant leadership. I wanted to share something with students who come to Viterbo, and I would hope it would help them benefit from an education like I did. It framed my worldview and perception and challenged me to be the best version of myself that I could be.”

Scott Romane
Class of 1986 and 2013
Franciscan Circle Member

WAYS TO GIVE



GIFTS OF RETIREMENT ASSETS

By making a gift of your retirement plan to our organization, your estate will receive a 100% charitable deduction, thereby saving estate taxes, and will avoid the income taxes on those assets. By comparison, if your estate were subject to the estate tax, your retirement plan would be subject to estate taxes, and if you left your retirement plan to children or grandchildren, those assets would result in substantial income taxes. From a tax perspective, your retirement plan is a “good” asset to leave to a charitable organization like Viterbo.

WILLS/BEQUESTS

Make a gift for Viterbo University’s future that does not affect your cash flow or standard of living now. Bequests are a popular way to maximize your giving potential and define your legacy.

Consider This:

- If you know the specific amount that you would like to leave Viterbo University, you can do so through an outright bequest of cash, securities, or any type of property.
- If you wish to provide for your family and for Viterbo University, then the designation of a percentage of your estate to your family and a percentage to Viterbo University may be the best approach for you. This allows you to provide for both your family and the university in the proportion that best suits your needs.
- Or you can specify that after all bequests are satisfied, the remainder or a percentage of the remainder will go to Viterbo University.

* Sample bequest language to include Viterbo University in your will is available.

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WAYS TO GIVE



CHARITABLE REMAINDER TRUSTS

One of the best ways to reduce taxes and provide for your family is with a Charitable Remainder Unitrust. This trust benefits you and your loved ones in the following ways:

- You can transfer highly appreciated assets to the trust tax free.
- You can select an annual payout to benefit you and/or your heirs for life or a term of years.
- You can structure the trust so its payments are tax-advantaged.

Viterbo benefits from the remaining assets.

IRA ROLLOVER

If you are 72 or older, you have reached the milestone where you have to begin taking your annual required minimum distribution or RMD from your retirement account. Along with that distribution comes tax on your previously untaxed assets. A way to satisfy your RMD requirements while avoiding tax and supporting Viterbo University is to make an IRA charitable rollover gift. Simply notify your IRA account custodian you want to make a “qualified charitable distribution” to Viterbo. You can give up to \$100,000 per year without paying tax on the distribution to charity.

LIFE INSURANCE

Life insurance is a low-cost way to provide a large gift. You can name us as a primary or contingent beneficiary. If you name us as a contingent beneficiary, we will only benefit if your primary beneficiary predeceases you.

The material is included for educational purposes only and/or it is not intended to be construed as professional legal or tax advice.

MEMBERSHIP



I am interested in learning more about becoming a member of the Franciscan Circle.

Please send me additional information regarding:

- Retirement Plan Assets
- Wills/Bequests
- Charitable Remainder Trusts
- IRA Rollovers
- Life Insurance

Name _____

Address _____

City/State/Zip _____

Telephone Number _____

Email Address _____

PLEASE RETURN TO:

Viterbo University
Attn. Eric Schmidt
900 Viterbo Drive
La Crosse, WI 54601
(608) 796-3078
www.viterbolegacy.com