

FOREVER LEWIS

◆ SPRING 2017 ◆

GIFT AND ESTATE PLANNING IDEAS
FOR ALUMNI AND FRIENDS OF
LEWIS UNIVERSITY



Establishing Impactful Educational Opportunities

Estate Gifts Enhance the Student Experience at Lewis

Lewis University, a comprehensive, Catholic university dedicated to the development of the whole person, is tremendously grateful for two visionary gifts which enable the University to provide a unique and expansive gateway for the personal growth of its students, as well as the local community. These estate gifts led to the establishment of two lecture series: The **Vince Howard Memorial Lecture** and the **James P. '60 and Mary Clare Sczepaniak Lecture**.

Vince Howard, a beloved and respected History professor, served as the first African-American department chair at Lewis. Throughout his extraordinary academic career, Vince imbued so many of our students with a deep and abiding passion for the study of history. It is very meaningful to the Lewis community that Vince designated funds for the University in his will which, upon his passing

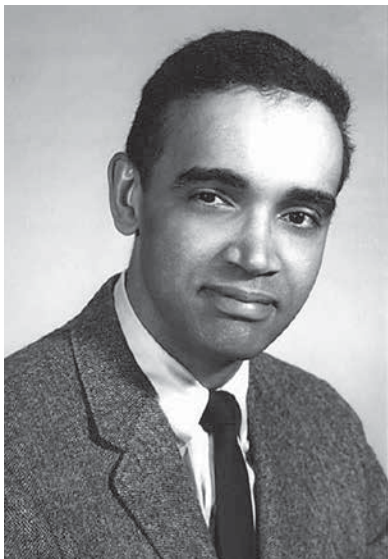
in 1989, were used to establish a popular annual history lecture. His amazing foresight has allowed the University, for decades now, to bring notable expertise to our campus and encourage students to engage in inspiring and thought-provoking discussions.

James (Jim) Sczepaniak '60 was also involved in education his entire professional career and spent many years teaching history at Romeoville High School. He was particularly passionate about exploring and preserving the rich and varied history of the Romeoville and Joliet area. It is thus only fitting that the recently launched James P. '60 and Mary Clare Sczepaniak Lecture Series, which was established with a portion of a generous gift from Jim's estate, will now bring prominent and nationally-recognized academic leaders to Lewis to examine our local and regional history within a national context.

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Vince Howard



Look for the Grand Opening of our new Student Center, named in honor of President Emeritus Brother James Gaffney, FSC, in the fall of 2018.

Your Will—Your Way

When it comes to writing your will, you can choose how—and to whom—you want your assets distributed after you are gone. The will is an extremely flexible instrument and there are a number of ways that you can designate your loved ones and charitable organizations to receive gifts.

Give “what’s left.” The residue of your estate is what remains after all other distributions have been made. After first providing for loved ones, you can devote all or a portion of the residue of your estate to Lewis University.

Give adjustable amounts. Leaving designated percentages of your estate allows you to give proportions rather than specific amounts. The amounts received are then automatically adjusted as the value of your estate changes.

Leave a fixed amount. Your will can specify a dollar amount to be given to Lewis University. This

option can make sense if you would like to ensure that a certain amount is received before leaving any remaining assets to others. Remember, however, that your financial situation may change over time. It is important to review your will and other plans from time to time. (See Page 4 for more details.)

Wills offer flexibility. You can also combine these methods in your will. For example, you might specify that certain amounts or properties go to certain people, then divide the remainder by percentages among Lewis University and other charitable organizations close to your heart.

Begin now

We will be happy to provide more information about including charitable gifts as part of your overall plans. Please contact us or your advisors for assistance.

...Educational Opportunities

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Our inaugural Sczepaniak Lecture in October of 2016 attracted 155 students, faculty, staff and community members. It featured Dr. Robert Sterling speaking on the old Joliet Prison. Fran Sczepaniak, Jim's second wife and surviving widow, paid us the greatest honor by saying, "This was really a 'Jim' event."

A quality education involves more than just classroom learning; it involves experiences and real-world opportunities. Gifts like Vince's and Jim's have truly made a huge impact on our students and left a vital legacy for our community.

Want to learn more about establishing an endowment or making an estate gift to Lewis University? Contact Robert A. Kanonik, J.D., Director of Planned Giving at (815) 836-5813 or kanoniro@lewisu.edu.



Jim Sczeganicek '60 graciously donated this bench in honor of the Christian Brothers.

Giving from the Heart

Most of us recall a priceless friendship that enriched our lives and inspired us in some significant way. Regardless of whether it was a spouse, parent, brother, sister, treasured friend or favorite teacher, chances are that person's influence still lives on today.

Why not share?

Sometimes words just aren't enough to convey appreciation for such strong and enduring relationships. What better way to honor the memory of a loved one than by furthering charitable interests you may have shared? Such thoughtfulness can also encourage others to make provisions for present and future needs.

Honor your loved ones

Remember, too, that a gift may be made in honor of a parent, friend or other loved one on Mother's Day, Father's Day, at the birth of a child or grandchild—virtually any time you wish to show how much you care.

All gifts are welcome

Is there someone you wish to honor in such a caring, lasting way? There are a variety of giving methods that can fit into existing financial and estate plans with ease.

We will be pleased to recommend creative memorial giving ideas that express your admiration in just the right way. Contact Robert Kanonik, Director of Planned Giving, at (815) 836-5813 or kanoniro@lewisu.edu.



Dr. Robert Sterling, Fran Naal Sczepaniak and Lois Geary (Jim Sczepaniak's sister)

How Do Your Plans Compare?

Most people find they need to make changes in their estate plans from time to time. Take this quiz to see how your existing plans compare to your current needs.

- 1. I have a will or other legal arrangements for distributing my property. True False
- 2. I have not retired from full-time employment since last reviewing my affairs. True False
- 3. My marital status has not changed since my last review. True False
- 4. No significant increases or decreases in wealth have occurred since my last review. True False

- 5. Children or grandchildren have not been born since my plans were last reviewed. True False
- 6. My friends and charitable interests are remembered as I wish in my plans. True False

If you answered FALSE to any question, you may want to meet with your professional advisor to be sure your plans reflect your wishes for the future. We will be happy to answer any questions you may have about the benefits of including charitable gifts to Lewis University as part of your plans.

Join the Harold E. White Legacy Society

The Harold E. White Legacy Society gratefully recognizes those thoughtful supporters who have included Lewis University in their estate plans. If you have included the University in your plans, please let us know so we may invite you to join this special group.

If you are considering including Lewis University in your will or other estate plans, you may want to provide your attorney with the following language:

"I give and bequeath _____% of my estate [or all the rest, residue and remainder of my estate] to Lewis University, Romeoville, Illinois, 60446, Tax I.D. #36-2167773, to be used for the general support of the University as its Trustees may deem appropriate."

MORE INFORMATION



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