

**HELPING  
STUDENTS  
TAKE CHARGE  
OF THEIR  
FUTURE**



**Southwest Wisconsin  
TECHNICAL COLLEGE**

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**FOUNDATION**

The Southwest Tech Foundation was incorporated in 1980 to identify, solicit, and manage alternative sources of funding to support the **COMMITMENT TO EXCELLENCE** of Southwest Tech. The Foundation was established as a non-profit organization, 501(c)3; therefore, all gifts to the Foundation are tax deductible to the limits of the law.

The Foundation is **DEDICATED** to providing alternative financial support for Southwest Tech's programs, students and staff. The Foundation accepts in-kind gifts of equipment, supplies, and resources to assist Southwest Tech in providing the greatest educational opportunities possible.

That is how we **CHANGE LIVES** – one opportunity and **ONE PERSON AT A TIME.**

## **SUPPORTING STUDENTS**

The Southwest Tech Foundation believes in supporting current and future students in achieving their educational goals. These students are our friends and neighbors. By providing educational and training experiences, we help provide individuals with the opportunity to gain skills and employment so our friends and neighbors can earn a living, raise their families and thrive here. Your planned gift to the Southwest Tech Foundation continues a tradition of investing in the future of our region.

## **SUPPORTING COMMUNITIES**

The Southwest Tech Foundation believes in supporting the organizations and businesses that are vital to the communities in this region. With state-of-the-art facilities, grant opportunities, training and more, area employers have resources at their disposal that encourages them to move to Southwest Wisconsin, stay here and grow with us! Your planned gift to the Southwest Tech Foundation can help provide opportunities for current and future employers and a well trained workforce.

## **SUPPORTING THE FUTURE**

Your planned gift is YOUR opportunity to change a life. Your gift is your opportunity to help lay the foundation for the next 50 years of technical education provided by Southwest Tech. When you create or make a planned gift to the Southwest Tech Foundation, you are creating a better tomorrow for us all.



## **GIFT PLANNING**

Giving through your estate can be a great way to leave your legacy without impacting your daily life, and it may reduce estate taxes and income taxes for your heirs. Consult with your attorney or tax professional to discuss how a planned gift could work for you.

# **YOU CAN SUPPORT**

## **BEQUEST BY WILL**

You can make a charitable gift by designating a percentage or a specific dollar amount of your estate. This type of gift qualifies for charitable tax deduction.

## **BENEFICIARY DESIGNATIONS**

Financial accounts, CDs, mutual funds, annuities, and life insurance policies allow you to make a charitable gift using beneficiary designations.

## **APPRECIATED PROPERTY**

Gifts of stocks, bonds, mutual funds, and real property qualify for charitable income tax deduction. You can avoid capital gains taxes and reduce potential estate taxes.



In all options, donors are welcome to designate a gift for specific fund(s) by submitting a Gift of Tomorrow/Planned Gift Commitment Form and providing the page of the estate document that identifies the gift or benefits.

# THE FUTURE TODAY!

## RETIREMENT PLANS

You can make a charitable gift using the beneficiary designation of your IRA, 401k, or other retirement plan. This type of gift avoids estate and income taxation on the assets accumulated tax-free during your lifetime.

## GIFTS OF LIFE INSURANCE

Life insurance offers flexible ways to make a charitable gift of an existing or new policy.

## GIFTS THAT PROVIDE INCOME

You can make a gift now, get immediate tax benefits, ensure that you or a loved one receives income payments for life, and make a future charitable gift.

# WHAT DOES IT MEAN TO BE A VISIONARY CIRCLE MEMBER?

## VISIONARY CIRCLE MEMBERS HAVE:

- Made a gift from their estate to the Southwest Tech Foundation, or
- Named the Southwest Tech Foundation in their will, or
- Established a charitable trust benefiting Southwest Tech, or
- Made a gift of insurance or any other similar deferred gift,

And, documented their charitable intent with the Southwest Tech Foundation.

As soon as you inform the Southwest Tech Foundation of your plans to make a future gift to benefit Southwest Tech, you become a member of the Visionary Circle.

To ensure that our records accurately reflect your intentions, please contact the Southwest Tech Foundation to communicate your plans.

With permission, the names of our Visionary Circle members are published each year in our annual report. All Circle members are invited to attend and be recognized at our annual donor reception and will be recognized on our donor wall.

**PLEASE FILL OUT THE BELOW FORM  
AND RETURN TO:**

Southwest Tech Foundation  
1800 Bronson Boulevard, Fennimore, WI 53809

\_\_\_\_\_ Yes, I have included the Southwest Tech Foundation in my estate plans and am excited to join the Visionary Circle!

\_\_\_\_\_ I would like more information about contributing to the Southwest Tech Foundation and how I can help provide opportunities for success.

\_\_\_\_\_ Please contact me about contributing to the Southwest Tech Foundation and joining the Visionary Circle.

Please contact me by

\_\_\_\_\_ phone; best time to call \_\_\_\_\_ a.m. / p.m.

\_\_\_\_\_ email

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Please visit [www.swtc.edu/GiftOfTomorrow](http://www.swtc.edu/GiftOfTomorrow) to fill out our Gift of Tomorrow/Planned Gift Commitment form.



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**FOUNDATION**

# VISION

“We change lives by providing opportunities for success!”

# MISSION

Promote learning through funding and activities that enables Southwest Tech to provide opportunities for success.

If you are interested in exploring ways in which you can help change lives in Southwest Wisconsin through the Southwest Tech Foundation, please contact:

## **Holly Clendenen**

Executive Director, Foundation and Real Estate Foundation  
608-822-2362 | email [hclendenen@swtc.edu](mailto:hclendenen@swtc.edu)

## **Kim Schmelz**

Director of External Relations and Alumni Development  
608-822-2379 | email [kschmelz@swtc.edu](mailto:kschmelz@swtc.edu)  
(tdd: 608-822-2072)

All inquiries are kept strictly confidential.



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toll free 800.362.3322 | 608.822.2362 | [swtc.edu/foundation](http://swtc.edu/foundation)