

“No one cares what group you come from or what age you are. We all just care about learning.”



Anne and Sandy Dolowitz are both Osher members. Anne joined first and began by taking classes in 2005. Sandy soon followed immediately after his retirement. “We don’t want to just stay home all day,” Anne says. “We need mental stimulation to stay smart!”

“No one cares what group you come from or what age you are. We all just care about learning,” Sandy says.

Anne and Sandy have met so many kind, interesting people through Osher over the years. They made deep friendships with four other couples and

have enjoyed many lunches, dinners, study groups and travels together. As Anne describes, “Everyone at Osher has something to share. It’s symbiotic. Our friends expand our interests.”

Interested in nearly everything, the couple exclaims, “We love Osher. We don’t know what we would do without it.” When it came time to review their will and estate planning, the Dolowitzes knew the Osher Lifelong Learning Institute at the University of Utah was a great fit for their wishes. They want to help others experience the benefits of Osher for many years to come.

Osher Lifelong Learning Institute
540 Arapeen Drive
Salt Lake City, UT 84108
www.continue.utah.edu/osher
801-585-5442

PLANNED GIVING AT THE OSHER INSTITUTE OF LIFELONG LEARNING AT THE UNIVERSITY OF UTAH

Grow a legacy with a gift for learning





THE POWER OF PLANNED GIVING

With Planned Giving, you can support the causes that mean the most to you, through a gift granted in your will, trust, or other planned arrangement. Assets you have worked for become the tools of charitable gift planning. Just a few sentences added to a will or trust document or a simple beneficiary change to an IRA or life insurance policy may be all that is required. Such charitable requests have no cost to you now, but enable you to make a meaningful gift at any point in the future.

Planned gifts provide a unique opportunity to create a lasting legacy, pass on your beliefs and values, and ensure that a vibrant Osher Lifelong Learning Institute (Osher) continues at the University of Utah far into the future, for generations to come. As people who love learning, we have the power to provide opportunities for those 50 and better to connect with a stimulating community of

peers and continue to learn about the world around us. If you appreciate the benefits Osher membership brings to your life, please consider including us in your planned giving.

MAKE A DIFFERENCE

When you make a planned gift to the Osher Lifelong Learning Institute at the University of Utah, you can truly make an impact. You can help sustain and improve our organization for the future. You can promote the benefits of lifelong learning and community engagement for Utah adults 50 and better. You can enrich your life and the lives of others who share a passion for intellectual inquiry and building rewarding friendships. The support of generous members helps Osher thrive and keeps us all young at heart.

Our Osher member donors have established scholarships to make our program more inclusive, given money to support specific Osher programs, provided funds for upgraded

technology, and granted unrestricted gifts to help keep our Osher Institute affordable. As in all Osher endeavors, we need the strong support of our members to succeed. Donors are extremely important to the success and quality of our mission. Your gift will make a meaningful difference.

CHOOSE THE GIFT THAT'S RIGHT FOR YOU

Everyone is invited to give. Often people think, “I don’t have an estate; I can’t make that kind of contribution.” However, people from all walks of life can make a planned gift. All gifts make a difference to our community of members, instructors and staff. We greatly appreciate every donation.

When most people think of making a gift, they think of writing a check or using a credit card. Planned gifts are usually made from people’s assets, such as cash, securities, real estate, business interests, artwork,

intellectual property, retirement plan assets, insurance policies, investment accounts, and oil, gas, or mineral interests. Planned giving offers you several options. You can make a gift of just about any type of asset you own.

HOW DO I MAKE A PLANNED GIFT?

There is no single way to make a planned gift. The approach you choose will depend on many factors, such as your goals and objectives, family situation, and stage in life. Types of Planned Gifts include:

- Bequest through a will or living trust
- Charitable Gift Annuity
- Charitable Retirement Account
- Charitable Remainder Trust
- Beneficiary designation on retirement plan assets, brokerage accounts, or donor advised funds
- Outright gift of or remainder interest in a personal residence or property

- Gift of a life insurance policy
- A single gift or a series of gifts throughout your lifetime
- A memorial contribution in the name of a beloved friend, family member, or colleague

THE NEXT STEP: TELL US ABOUT YOUR GIFT

We greatly appreciate receiving information from you in advance regarding the specific purposes of your planned gift. We want to insure that your gift will be used as you intend. Even if you wish to keep your planned gift anonymous, we encourage you to let us know of your plans on a confidential basis.

PLEASE CONTACT US

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