SUPPORTING SCHOLARSHIPS THROUGH PLANNED GIFTS

Drs. Jane and Peter Brazy—Investing in Future Leaders

Washington University in St. Louis
McDonnell Challenge to Help Reach $500 Million for Scholarships

An extraordinary commitment of $20 million from Washington University Life Trustee John F. McDonnell provides an opportunity to achieve a total of $500 million for scholarships and fellowships to benefit all undergraduate, graduate and professional students at Washington University. The McDonnell Scholarship Challenge will match all new and increased scholarship gifts that are made by June 30, 2018, the end of the Leading Together campaign.

Scholarship gifts and commitments qualifying for the McDonnell Scholarship Challenge include:

- All outright gifts received by June 30, 2018,
- Multiyear pledges payable through June 30, 2023. Multiyear pledges will count toward the campaign total.
- Gifts made through family foundations and donor-advised funds,
- Select planned gifts.

Please Note: Donors may direct their gifts to their school of choice. Matching funds from corporations or other entities will count toward the donor’s contribution. Matching funds from the McDonnell Challenge will support the McDonnell Scholars program in the McDonnell International Scholars Academy.

Which planned gifts will qualify for the challenge?

New or increased estate gifts and life income gifts of $100,000 or more from donors age 60 or older that are established by June 30, 2018, will qualify for a fifty cent match for every dollar contributed, including:

- Bequests through wills and trusts
- Beneficiary designations on retirement accounts, life insurance and commercial annuities
- Payable on death/transfer on death accounts including bank and brokerage accounts
- Charitable gift annuities
- Charitable remainder trusts

How can my estate commitment or life income gift qualify for the challenge?

Your estate or life income gift will qualify if it meets the following criteria:

- The donor is age 60 or older by June 30, 2018
- The value of the gift is $100,000 or more
- The gift is designated to scholarship support

My estate gift qualifies for the challenge, but I want to remain anonymous. Why is it important to share the details of my estate gift with the university?

We understand and respect donors’ decisions to remain anonymous. If you wish to remain anonymous, the details of your gift will remain confidential and your name will not appear in any university honor rolls or other recognition communications.

Sharing the language from your will or living trust that names the university as a beneficiary will ensure that your future gift is used for the purpose you intend. The Planned Giving staff will assist with appropriate language to include in your will or living trust and supporting documentation that will provide direction on how the gift is to be used. Any information that you share will be held in confidence and is not legally binding on your estate.

If you have designated a gift through your will, living trust or other planned gift, we would like to recognize your gift in the Leading Together campaign and welcome you as a member of the Robert S. Brookings Partners. For information on the McDonnell Scholarship Challenge or to notify the university of a gift in your will or trust, please contact the Office of Planned Giving at 800-835-3503 or 314-935-5373 or email plannedgiving@wustl.edu.
Sharing the Gift
of Scholarship

As one of 15 women in her medical school class, Jane Brazy, MD ’72, recognized that Washington University was a special place. “Female medical school enrollment nationally in 1968 was less than ten percent,” Jane recalls. “WashU was willing to admit more women. Our class was 15 percent women and very diverse from a racial, socioeconomic and geographic perspective, which was unusual for the times.” Jane and husband, Peter, MD ’72, met at Washington University and eventually married. “We also were one of four marriages in the class,” Jane adds, with a laugh.

After earning their medical degrees, the Brazys remained in St. Louis where Jane completed her residency in pediatrics at St. Louis Children’s Hospital and Peter completed his in internal medicine at Barnes Hospital. Both studied under prominent faculty members whose influence had a significant impact on the couple’s career choices. “Jane and I were drawn to academic medicine because it provided opportunities to teach and practice clinical work,” Peter says. “Neal Bricker, MD, director of the renal division at the time, inspired me to pursue a specialty in nephrology. The opportunity to do an eight-week research rotation with Saulo Klahr, MD, was another important component of my medical school experience,” says Peter. “David Kipnis, MD, was chairman of the Department of Medicine during my residency. He provided guidance on options for continuing my post-graduate research education.” Jane’s mentors included Philip Dodge, MD, co-creator of the Washington University Department of Pediatric Neurology and a major contributor to modern pediatric neurology, and James Keating, MD, director of the pediatric residency program at St. Louis Children’s Hospital.

Jane and Peter completed fellowships in their respective specialties at Duke University School of Medicine, and they subsequently spent 14 years on faculty there. The couple also spent 14 years on faculty at the University of Wisconsin–Madison School of Medicine, where Jane was head of neonatology and Peter was head of nephrology. Both are now professors emeriti at the University of Wisconsin–Madison.

Jane and Peter are grateful for the scholarship support they received and passionate about giving back to provide gifted students the opportunity to experience the unique benefits of a Washington University education.

Their longstanding support includes two charitable gift annuities to fund the Drs. Peter and Jane Brazy Scholarship in the School of Medicine. “Jane and I want to provide an opportunity for talented and gifted students to interact with the exceptional faculty at Washington University School of Medicine,” says Peter. “It is our hope that qualified students will have these types of transformational experiences regardless of financial circumstances.”

Like the Brazys, you can establish a charitable gift annuity that provides payments to you or other beneficiaries, as well as significant tax benefits. To learn more, contact the Office of Planned Giving at (800) 835-3503.
An Exceptionally Powerful Gift

A scholarship gift benefits more than individual students. Every person and community touched by the students’ work and service multiplies the impact of your gifts.

Planned giving provides many strategies that may allow you to support students in ways that may not be possible through current gifts. Consider the impact that planned gifts continue to make at Washington University:

The Jackson Johnson Scholarship, established in 1930 through the estate of Jackson Johnson, has benefited more than 700 medical students, including a Nobel laureate, Washington University department chairs and faculty, and outstanding physicians and researchers throughout the world.

Emma R. Showman was a dedicated teacher. The Emma Showman Memorial Scholarship, established in 2005 through the estate of Winfred Showman, MD '21, and Emma R. Showman, honors her memory by providing support for students majoring in education in the College of Arts & Sciences. To date, 25 Showman scholars have benefited from this generous bequest.

The Norvell C. Brasch Memorial Scholarship, established in 1974 by Jerome F. Brasch, BS ’44, MS ’47, and Rosalie Brasch in memory of Mr. Brasch’s brother, is one of seven founding scholarships in the School of Engineering & Applied Science. Endowed through the assets of a charitable life income plan, the scholarship will continue to benefit engineering students for generations to come.
There are various ways to establish an annual or endowed scholarship through current gifts, planned or deferred gifts, or a combination thereof. All scholarship gifts, regardless of size, may be designated to the school of your choice.

Current Gifts
You may designate your annual gift to support the general scholarship fund (no minimum) or an annual scholarship with a gift of $5,000 or more. A full-tuition endowed scholarship can be established for $1 million, or a gift of $100,000 or more can fund a partial-tuition scholarship.

Planned Gifts
Planned giving provides a number of creative strategies that allow you to support scholarships in ways that may not be possible through current gifts. You can establish an annual or endowed scholarship through your estate plan, a life income plan or another planned gift that provides attractive financial and tax benefits.

Estate Gifts
A gift through your will, trust, qualified retirement plan or life insurance is a simple, yet significant way to support scholarships and maintain the flexibility to meet ongoing personal and family needs. Estate gifts enable you to:

- Provide for the needs of family and loved ones
- Retain control of your assets during your lifetime
- Reduce estate taxes on your passing

Life Income Plans
Charitable Gift Annuity
- Establish a charitable gift annuity with $5,000 or more in cash or appreciated securities and receive fixed lifetime payments (see current rate chart), a charitable income tax deduction and estate tax benefits
- Reduce capital gain tax when you fund your gift annuity with appreciated securities
- Enjoy partial tax-free payments

Charitable Remainder Unitrust
- Fund a charitable remainder unitrust with $50,000 or more in cash, appreciated securities or real estate and receive lifetime payments, a charitable tax deduction and estate tax benefits
- Washington University will draft and manage the trust and serve as trustee at no cost to you
- Reduce capital gain tax when you fund the unitrust with appreciated assets such as securities or real estate
- Enjoy tax-free principal growth

Gifts of Appreciated Assets and Real Estate
One of the most tax-efficient ways to give is through gifts of appreciated assets (owned for more than one year) such as real estate or publicly traded securities. Benefits of contributing appreciated assets to the university include:

- A charitable income tax deduction based on the current value of the property
- Capital gain tax savings
- An opportunity to use these assets to fund select life income plans

For additional information on these and other planned giving strategies, please contact the Office of Planned Giving at 800-835-3503 or 314-935-5373 or via email at plannedgiving@wustl.edu.
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* Includes undergraduate, graduate and professional students. All figures are current as of FY16.

Scholarship

The Jackson Johnson Scholarship

The Norvell C. Brasch Memorial Scholarship

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Gift Annuity Sample Payment Rates*

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[Table with payment rates for one and two lives]
The Robert S. Brookings Partners recognizes individuals who have chosen to support Washington University through estate gifts, life income plans or other planned gifts. The generosity of these donors helps ensure the continued excellence of the university for generations to come. For information or to notify us of a gift in your will, trust or other planned gift, please contact the Office of Planned Giving at 800-835-3503 or 314-935-5373.
What’s inside:

Sharing the Gift of Scholarship

Dedicated supporters of the School of Medicine, Jane Brazy, MD ’72 and Peter Brazy, MD ’72 are passionate about giving back to provide gifted students the opportunity to experience the unique benefits of a Washington University education. See page 1.

An Exceptionally Powerful Gift

Scholarship gifts benefit more than individual students. Every person and community touched by students’ work and service multiplies the impact of your gifts. Planned giving provides creative strategies that can significantly increase that impact. See pages 2 and 3.

McDonnell Challenge to Help Reach $500 Million for Scholarship

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$500 Million
By June 30, 2018

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