



Thursday, February 19, 2004

Seminar explores estate planning

By **Dawn Pauli**, contributing writer

To help faculty, staff and donors better understand planned philanthropic giving, the **Oakland University Foundation** is hosting an estate planning seminar.

The seminar introduces a process that examines the issues surrounding planned giving and the importance of connecting estate plans with personal values.

"This seminar is unique because it makes participants really think about estate planning and what's driving their decisions," said Dennis Sheridan, director of planned giving. "It takes into account your history, values, attitudes and preferences regarding your wealth."

The two-hour seminar will be presented by John Dankovich, senior adviser for the Estate Strategic Group.

Planned giving helps ensure the long-term growth of OU while helping donors with their estate, financial or tax-planning needs. This type of donation requires a third party, such as an attorney, accountant, investment or financial planner, or a professional within the charity, such as Sheridan.

"I often meet with people who are interested in planned giving but are concerned about finances," Sheridan said. "They are facing kids in college, retirement and a troubling economy. This seminar helps people determine their goals and consider potential assets they may have overlooked, such as stock that they are hesitant to sell because of capital gains tax."

The first-ever gift made at Oakland University was a planned gift that established the university. Matilda Dodge Wilson left her residence, Meadow Brook Hall, the estate's 1,500 acres and \$2 million to found what would eventually become OU.

"Mrs. Wilson had the foresight to plan," Sheridan said. "As a result, she could control how her assets were allocated and how her estate is preserved."

The seminar will not solicit for any charitable donations. However, Sheridan points out that OU soon will undertake its largest capital fund-raising endeavor in its 40-year history.

"We're hoping employees and donors will take the time to carefully consider what is important to them and how they can turn this into their own unique legacy," Sheridan said. "We're hoping the seminar will give them insight into some issues they may have considered in the past."

The seminar will be offered three days:

Wednesday, Feb. 25

9-11 a.m., Oakland Center Rooms 128-130

Please RSVP by Friday, Feb. 20

Tuesday, March 2

11 a.m.-1 p.m., Meadow Brook Hall

Please RSVP by Wednesday, Feb. 25

Thursday, March 25

3:30- 5:30 p.m., Oakland Center Rooms 128-130

Please RSVP by Thursday, March 18

Refreshments will be served. RSVP by calling (248) 370-3700, ext. 1029. For more information on estate planning and giving to OU, visit the **Giving to OU** Web site.

SUMMARY

To help faculty, staff and donors better understand planned philanthropic giving, the Oakland University Foundation is hosting an estate planning seminar. The seminar introduces a process that examines the issues surrounding planned giving and the importance of connecting estate plans with personal values.

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