Planned Giving at Marquette

Have you included Marquette in your estate plan? The gifts we receive each year from individual estates help make all that we do possible. We hope you will consider including us in your will or estate plan.

If Marquette is already in your estate plan but you have not yet informed the university, please let us know so we can welcome you to our Legacy Society and express our gratitude for your generosity.

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Planned Giving

The St. Ignatius Legacy Society was established to recognize and honor benefactors who have created personal legacies at Marquette through an estate provision or planned gift. These individuals have demonstrated their commitment to the future of the university through gifts that preserve the tradition of excellence at Marquette.

The generosity of St. Ignatius Legacy Society members makes an enduring impact on the university and serves as a powerful tool of influence for Marquette’s reputation as an educational leader. Making planned gifts to Marquette

A planned gift presents an extraordinary opportunity to honor a loved one, an inspiring professor or a field of study that has made an impact on your life. You can create a legacy that takes into account your family needs, reflects your values and gives back to future generations.

Leaving a Legacy

For the Future

Through Innovation

From projects aimed at helping to ensure the safety of the world’s fresh water supply to reducing crime on Milwaukee’s Near West Side to building a technology transfer program at Marquette, the university’s new strategic innovation fund is spurring exciting problem-solving on campus and well beyond.

Marquette is committed to the research, collaboration and innovation that will turn new ideas into solutions for problems not only within the university but also throughout our increasingly complex global community. Ingrained in the university’s strategic plan and recently implemented in many ways across campus, Marquette’s focus on innovation has a champion in university President Dr. Michael R. Lovell: “We serve God by serving our neighbor. Marquette’s unique charge is to develop individuals intellectually and morally, empowering them to apply their ingenuity toward making a positive impact in our world.”

Launched in 2014, the university’s strategic innovation fund has mobilized students, faculty and staff across disciplines to pursue developing innovative solutions to
problems. The fund, led by 20 students, faculty and staff representing a cross-section of the university, is supported in large part through donations from alumni, parents, and individual, corporate and foundation friends. Applicants propose projects in one of seven categories: Academic Programs and Student Support, Advanced Manufacturing and Engineering, Community Collaboration and Outreach, Health and Well-being, Water and the Environment, Social Innovation, and University Infrastructure and Support. Projects are vetted and awarded through a competitive process. From 275 pre-proposals submitted last fall, 38 were awarded funding that totaled nearly $6 million. For the complete list of awarded projects, visit marquette.edu/innovation/sif-awardees-2015.php.

As a “seed” fund, the fund helps support the launch of new ventures, impacting the region’s economy by generating meaningful business development and nurturing a pipeline of creative, young talent. The university’s Kohler Center for Entrepreneurship has also been expanded to foster more collaboration and ventures between students from across the university. In addition, the innovation focus on campus has led to other funds at Marquette that support innovation and entrepreneurship:

The Dorm Fund, a student-led investment fund, supports early-stage undergraduate projects that are anticipated to develop ideas for larger-scale opportunities.

The Women’s Innovation Network promotes women as innovators and entrepreneurs by broadening access to resources. Planned gifts to Marquette’s strategic innovation fund, the Kohler Center for Entrepreneurship or the three new seed funds help ensure that the university continues to develop change agents who can launch new endeavors and explore high-impact ideas that can improve our campus, our community and our world. To help Marquette be a catalyst in transforming our region into a hub of innovation and entrepreneurship through a planned or estate gift, please contact Kathryn Hofman, managing director of planned giving, at 414.288.0396 or by emailing kathryn.hofman@marquette.edu.

For the Love of Art

“Giving back makes you feel so good ... you get so much when you give to others.” Jean Holmburg should know. She’s given back to her community in many ways over the years. She and her husband, Chuck, recently made a planned gift to Marquette that will help provide educational programs at the university’s Haggerty Museum of Art. Dr. Holmburg, a graduate of the University of Wisconsin Medical School, and Jean, a graduate of the Madison General Hospital School of Nursing, are self-proclaimed Badger fans. They are also fans of Marquette and of the Haggerty in particular.

“Our daughter Ann Keiper graduated from Marquette (Arts ’02) and met her husband, Jamie, there,” says Jean. Jean raised three daughters with Chuck, a physician, and spent many years with the Milwaukee Symphony Orchestra League, serving as president and leading many fundraising events. It was in 2005, when she was invited to join the Haggerty board, that the couple became enthusiastic supporters of Marquette’s “jewel.”

Art has always been near and dear to their hearts. “We have been to lots of art museums,” explains Chuck. “But we didn’t hear about the Haggerty until Jean got involved with the board. I was amazed at the quality and variety of art in the museum.”

Jean says she learned to appreciate all kinds of art through the Haggerty, and “when I became president of the Board, I really enjoyed working with the Friends of the Haggerty. I’m very impressed by our new director, Susan Longhery, who is moving us in the right direction.”

Jean is a cochair of the effort to renovate the aging 30-year-old museum to create more space for exhibiting works of art and to accommodate the tremendous increase of its educational programming — not only for Marquette students but for students from nearby colleges, high schools and elementary schools.

“Educational programs are at the heart of the Haggerty,” explains Jean. “Through our planned giving, we want to support the future of Marquette for our children and grandkids. Dr. Lovell is moving us forward and, along with Susan leading the museum, it will have a bright future.”

Making Your Gift from a Donor-advised Fund

A growing number of Marquette donors are using a donor-advised fund to make a charitable gift to the university. A DAF is an account established by a donor who receives an immediate tax benefit. The donor can then recommend when funds, or grants, should be taken from the DAF and made to Marquette.

Many of the institutions that help donors set up DAFs (called the account’s custodian) are the charitable arm of a for-profit financial services institution. Others are independent sponsoring organizations that are not affiliated with a particular financial institution or charity such as the National Philanthropic Trust. A DAF is an increasingly common way to give to a charity; a recent report by the National Philanthropic Trust noted that grants from donor-advised funds to qualified charities such as Marquette reached $12.49 billion in 2014.

Donors can choose the fund name, such as “the Mary Jones Scholarship Fund.” Minimal funding is required to start a DAF with some accounts having a threshold starting at $5,000 dollars. Administration and investment is handled by the DAF custodian, for a fee. The majority of DAF donations nationwide in 2014 came in the form of highly appreciated securities and other complex assets. This is because appreciated stocks receive a tax deduction based on the full market value of the stocks at the time the stocks are transferred to the DAF custodian. Donors can also make arrangements for estate gifts through their DAF by notifying their DAF custodian to recommend that any funds remaining in their account after their death be allocated to Marquette. This ensures that your estate gift honors