



Osher Lifelong Learning Institute
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The Osher Lifelong Learning Institute at West Virginia University, known as OLLI at WVU, provides programs and educational opportunities designed for adults 50 and over.

OLLI at WVU is a membership organization within the WVU School of Public Health that emphasizes the sharing of ideas through peer learning, member participation and collaborative leadership.

olliatwvu.org

West Virginia University is an Equal Opportunity/Affirmative Action Institution. The WVU Board of Governors is the governing body of WVU. The Higher Education Policy Commission in West Virginia is responsible for developing, establishing and overseeing the implementation of a public policy agenda for the state's four-year colleges and universities. (314082)

**WHAT
WILL
YOUR
LEGACY
BE?**



Lifelong learners value education — for themselves and others. Osher Lifelong Learning Institute (OLLI) at WVU exists because of the unique experiences, capabilities and wisdom of mature members of the community.



Daily, we see the educational and social impact OLLI has on members. Funded through membership fees, donations and grants, OLLI benefits from the generosity of like-minded lifelong learners. Each gift allows meaningful work that would not have happened otherwise.

Your consideration of a gift today or in the future for OLLI at WVU will benefit the programs and help secure your OLLI legacy.

Every gift has an impact.

GIVING TODAY.

- ✓ Give an **IRA gift**. Giving directly from your IRA, i.e., “charitable IRA rollover,” to OLLI is considered part of your required minimum distribution (RMD), yet is not reported as income for tax purposes nor do you receive a charitable income tax deduction.
- ✓ Donate **securities**, i.e., stocks. You avoid capital gains taxes on the increased value.
- ✓ Give a gift that provides income to you. By **giving an asset away**, it is possible to receive payments for your lifetime with a higher rate of return than you may be receiving now.
- ✓ Of course, **cash** is always an option.
- ✓ Give from a **donor advised fund**. Gifts from these funds can also benefit OLLI at WVU.

WHAT OUR MEMBERS SAY ABOUT OLLI

“Being a member of OLLI has introduced me to a whole new group of friends ... ”

“OLLI membership has opened a whole new world for me and has given me a challenging and very rewarding activity for my retirement years.”

“A wonderful opportunity for we retirees.”

GIVING TOMORROW.

- ✓ Provide a gift in your **will** (bequest), **trust** or **estate plan**.
 1. Consider **what** you would like to give, e.g., a specific dollar amount, a percentage or all of your estate.
 2. Next, decide **what purpose** you would like your legacy to accomplish, e.g., greatest priority needs or a specific purpose, such as lecture, scholarship or technology enhancement.
 3. Finally, determine **how** you would like this to occur, i.e., a permanent or a non-permanent fund.
- SAMPLE BEQUEST LANGUAGE**

I give to the West Virginia University Foundation, Inc. (FEIN 55-6017181), a non-profit, charitable educational corporation in Morgantown, West Virginia, **(1. what)**, for **(2. what purpose)** through **(3. how)**.
- ✓ Provide a gift through your **retirement account**, including IRA/Roth IRA or pension plan. List OLLI at WVU as a beneficiary or contingent beneficiary on plan documents.
- ✓ Donate a **life insurance** or annuity policy by listing OLLI at WVU as a beneficiary or as owner and beneficiary on plan documents.

RECOGNITION

Including OLLI in your estate plan entitles you to membership in the Irvin Stewart Society. More information is available at the OLLI website or at wvuf.org/content/irvin-stewart-society.