Helping Students Focus on Their Passions, Not Their Loan Debt

“It feel so strongly about what an incredible education Minnesota Law is.”

The Future is Bright for Minnesota Law. For nearly 135 years, Minnesota Law has been educating future generations of lawyer-leaders, supporting groundbreaking research and training, and providing transformative contributions to the legal community and the public. Through scholarships we ease the burden of debt on students who are preparing to face the challenges of a rapidly evolving world. Through faculty support, we nurture new ideas and theories that help develop and shape law. Through innovative programs and events, we elevate and lead in public engagement and intellectual discourse. We are tremendously grateful for the many alumni and friends who plan for the future of Minnesota Law by including the Law School in their estate plans. No matter your career path or your passions, we hope that you will consider a planned gift for the Law School that reflects your own powerful legacy. Together, we are building a bright future for our Law School.

Sincerely,

Garry W. Jenkins
Dean and William S. Pattee Professor of Law

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grappling with “gray areas.”

Everything clicked when she started studying tax law and pursued courses in her second and third years that better played to her strengths and interests. She enjoyed the remainder of law school, making many good friends along the way and working as a research assistant to Professor Karen Brown. Welder credits Brown for supporting her in many ways, most notably by encouraging her to consider a position with a large accounting firm to launch her career after graduation.

The advice proved invaluable. Over 25 years later, Welder is still with Deloitte and now serves as the tax leader for one of its three U.S. regions. She also works as a corporate tax adviser for many companies of all sizes—including members of the Fortune 500—in the technology, media, and entertainment industries. In her work, Welder is driven by the opportunity to help companies tackle operational challenges.

“I really love helping my clients fix problems,” she said. “I work with a lot of startup companies and a lot of inbound companies coming to the U.S. It’s exciting to be a part of their whole growth process from the start and to help them stand up a business in the U.S. and sometimes globally.”

Having found her niche, Welder is inspired to help future students do the same. She hopes her scholarship will reduce students’ dependence on student loans, and in doing so, free them to pursue the areas they are most passionate about, rather than the career that will just pay the bills.

“All gifts to the Law School can be designated to the area or program that is most meaningful to you. You may consider establishing a new named fund in honor of a loved one, or give to one of our existing funds for the Law School. To learn more about planned giving and ways you can achieve your philanthropic goals, contact David L. Jensen, Director of Advancement, at dljensen@umn.edu or (612) 625-2060. To give today, visit law.umn.edu/give/planned-giving.”

“Planned Giving for Future Generations of Lawyer-Leaders

**Planned gifts are as varied as the lawyer-leaders who make them.** By partnering with Minnesota Law, along with your family and trusted advisors, you can create a plan that reflects your charitable goals, maximizes potential tax benefits, provides financial security for you and your loved ones, and creates a lasting legacy for you that will help the Law School remain a leader worldwide.

**Did you know there are many ways you can support Minnesota Law?**

- **Continue your support of the Law School with a legacy gift.** With a gift in your will or trust, you can give a specific amount, or a percentage of what remains after you’ve provided for your loved ones.
- **Name the Law School as a beneficiary.** You can direct support to the Law School by naming the University of Minnesota Law School as a beneficiary of your retirement account, life insurance policy, bank or brokerage account for all or a portion of the proceeds.
- **Make a gift and receive income.** Several gift options provide you or others with income for life, with the remainder used to benefit the Law School. These gifts can also provide significant tax benefits, especially if you use appreciated assets to fund your gift. Some donors choose to defer the payments to provide for additional retirement income.
- **Give appreciated assets.** Giving securities that have increased in value, such as stocks, bonds or mutual funds, is a tax-efficient way to support the Law School. For securities held longer than one year, donors may deduct the full fair market value, subject to applicable limitations. Donors who do not itemize deductions may still benefit by avoiding capital gains tax that would otherwise be due at sale. There are similar tax benefits for donating other appreciated assets, such as real estate.

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To give today, visit law.umn.edu/give/planned-giving

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“The University of Minnesota Foundation is here to partner with the Law School to help you achieve your philanthropic goals.”

— Jane F. Godfrey ’91

Associate Vice President, Planned Giving & Estate Administration, University of Minnesota Foundation
Ensuring a Transformational Lecture Series Continues Well into the Future

In 2013, U.S. Vice President Walter Mondale ’56 was invited to return to Minnesota Law and give a special lecture. His visit inaugurated the Robert A. Stein Lecture Series, an ongoing event series that invites leaders of the bench and bar, as well as those in government, to speak on a topic of national or international interest.

The annual lecture series was created through an endowment from Robert Stein ’61, Everett Fraser Professor of Law, who previously served as dean as well as executive director and chief operating officer of the American Bar Association. The series has been a hit, with students, faculty, staff, and alumni snapping up thousands of seats within minutes of event registration opening.

“The Stein Lecture series has become a hallmark of Minnesota Law, bringing extraordinary leaders to campus to enrich our entire community,” said Garry W. Jenkins, dean and William S. Pattee Professor of Law. “Thanks to the generous support of Bob and Sandy [Stein], five incredible U.S. Supreme Court Justices and Vice President Mondale have shared their valuable insights with the Law School, University, and legal community. The Stein Lectures enable the Law School to continue to host marquee events for the community, bring a deeper understanding of the law to a broader audience, and inspire students to leadership through engagement with transformational public leaders.”

Recently, Stein ensured these popular lectures can continue to benefit the Law School community for generations to come by establishing a planned gift designed, in part, to support them.

“I want the law school curriculum to be enriched, and the law school experience to be more fulfilling on into the future,” he said. “The lectures are an opportunity for students to learn about the justices as individuals and about their values.”

In addition to helping the annual lecture program thrive, Stein’s planned gift will bolster a scholarship established in his name—the Stein Scholars program, created by a collection of lawyers in 1994 as a tribute to his leadership and service as dean. More than 30 students have received the scholarship, which covers all three years of law school since its inception. Stein maintains a connection with these recipients not just while they are in school, but throughout their careers, meeting with them twice a year.

Stein’s experiences as a student, faculty member, dean, and donor at Minnesota Law have given him many vantage points on the ways the law school has evolved over the years. Advances in technology have brought students new ways to interact with course materials, he noted, while new areas of study have enhanced the curriculum. For these reasons and more, Stein believes it’s a great time to be part of Minnesota Law right now.

“The Law School has been certainly part of my life since my days as a student,” he said. “It’s a joy to be able to support it and to make provisions to enrich the curriculum for the students, both in scholarships and in programming, going on into the future.”

Make a Gift and Save on Taxes

Naming the University of Minnesota Law School as a beneficiary of your retirement account is both a meaningful and tax-efficient way to support future generations of law students. Distributions to individuals from tax-deferred retirement plans are subject to tax. However, these assets aren’t taxed when given to charitable organizations like the U of M. That’s why many donors choose to give tax-deferred assets to benefit the Law School, and other assets to loved ones. You can make changes to your retirement beneficiary designations by using the form provided by the plan administrator.
Join the 1888 Society with a Legacy Gift

The 1888 Society celebrates the founding of the University of Minnesota Law School in 1888 and the future of the Law School made possible by the generous individuals who have created a lasting legacy by including the Law School in their estate or financial plans. The Law School will recognize your planned gift through enrollment in our 1888 Society, the University of Minnesota’s Heritage Society, and recognition at the Law School and in various published materials.

For further information on planned giving, contact:
David L. Jensen
Director of Advancement
University of Minnesota Law School
dljensen@umn.edu or (612) 625-2060

My spouse and I included the Law School in our estate plan because earning a law degree created possibilities in our lives. No one should be denied a similar experience because of lack of funding — scholarships can change people’s options and in turn positively impact the world.

—MEREDITH McQUAID ’91
Associate Vice President and Dean of International Programs, University of Minnesota