



Estate planning seminar.

[Madison, Wisconsin]: [s.n.], [s.d.]

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From The University of Wisconsin-Madison / University News and Publications Service, Bascom Hall, Madison 53706 / Telephone: (608) 262-3571

Release: Immediately

11/10/75 mt

MADISON--The 12th semiannual Family Financial and Estate Planning Seminar of the University of Wisconsin Foundation will be held from 8:15 a.m. to 3 p.m. Dec. 6 at the Wisconsin Center, 702 Langdon st.

Scheduled on a Saturday to encourage attendance by husband and wife as a team, the seminar features authorities in investments, basic family financial planning, law and taxation pertaining to estate planning, and charitable giving.

George H. Austin, executive director of the State Investment Board, will discuss investment considerations. Other speakers include Prof. Louise A. Young, UW-Madison School of Family Resources and Consumer Sciences, and Prof. Richard A. Kabaker, of the Law School.

At the seminar luncheon, Prof. Ordean G. Ness, chairman of the department of communication arts, will talk on "Communication--A Gift with Strings Attached."

Also addressing the participants will be Robert B. Rennebohm, Foundation executive director, and Theodore W. Zillman, associate director for deferred giving and estate planning and chairman of the seminar.

Reservations may be made through the UW Foundation, telephone 263-4545. The cost of the seminar is \$8.00 per person, which includes lunch and coffee hour.

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Release: **Immediately**

11/25/74 jag

ATTENTION: Business, Family Editors

UW FOUNDATION SEMINAR ON FAMILY FINANCIAL AND ESTATE PLANNING TO BE HELD DEC. 7

MADISON--Home canning--the risk to family health and safety, will be one of the topics to be discussed by Prof. Edwin M. Foster at the University of Wisconsin Foundation Family Financial and Estate Planning Seminar Saturday, Dec. 7th.

Prof. Foster is the Director of the UW's Food Research Institute and will be the featured luncheon speaker. His professional activities and expertise in the field of food safety and nutrition have brought him and Wisconsin international acclaim.

Additional instructors include: Home management Prof. Louise A. Young, income tax, social security, record keeping, and insurance; Law School Prof. Richard Z. Kabaker, legal and tax considerations; Theodore W. Zillman, associate director of the Foundation, charitable giving; Richard B. Nigbor, Investment Director, State of Wisconsin Investment Board, investment considerations.

Sessions will be held in the Wisconsin Center and the Alumni House, 702 Langdon st., on the Madison campus beginning at 8:50 a.m. Married couples are especially welcome. The seminar is open to both men and women with question-and-answer periods following the formal presentation.

A \$7.50 fee covers seminar expenses, early coffee and the noon luncheon. Reservations can be made thru the University of Wisconsin Foundation, 702 Langdon st., Madison 53706. Checks should be made payable to the Foundation. For further information call 608-263-4545.

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NEWS

FROM UWF

UNIVERSITY OF WISCONSIN FOUNDATION

702 Langdon Street • Madison, Wisconsin 53706 • Phone 608/257-3616

*Institute
estate planning*

Immediately

3/20/74 jag

ATTN: Business, Family Editors

UW FOUNDATION SEMINAR ON FAMILY FINANCIAL AND ESTATE PLANNING SLATED APRIL 20

MADISON--Inflation's effect on individual investments and trust funds will be among the topics of the annual University of Wisconsin Foundation Family Financial and Estate Planning Seminar Saturday, April 20.

Sessions will be held in the Wisconsin Center and the Alumni House, 702 Langdon st., on the Madison campus beginning at 8:50 a.m. UW-Madison faculty members in law, business, and home management will share knowledge of personal finances. Married couples are especially welcome and the seminar is open to both men and women.

Speakers and interest areas include: Home management Prof. Louise A. Young, income tax, social security, record keeping, and insurance; Law School Prof. Richard Z. Kabaker, legal and tax considerations; Theodore W. Zillman, associate director of the Foundation, charitable giving; George H. Austin, executive director of the State of Wisconsin Investment Board, investment considerations.

Emeritus Prof. H. B. McCarty, known for his pioneering work with the UW Extension station WHA, will be the luncheon speaker. McCarty will discuss "Campus Characters I've Known."

A \$7.50 fee covers seminar expenses and the noon luncheon. Reservations can be made at the University of Wisconsin Foundation, 702 Langdon st., Madison 53706. Checks should be made payable to the Foundation. For further information, phone Theodore W. Zillman, 608-263-4545.

*Initiates
State
Planning*

Release:

Immediately

11/5/73 jb

MADISON--Experts on wills, taxes, investments, and record-keeping will discuss their special fields at the second annual Family Financial and Estate Planning Seminar in the University of Wisconsin-Madison Center Dec. 1.

Sponsored by the UW Foundation, the program is designed for couples interested in comprehensive financial planning for the family. It will begin at 8:50 a.m.

Dr. John R. Pike, Madison, director of the Wisconsin Investment Board, will cover investment considerations. UW Family Resources and Consumer Sciences Prof. Louise A. Young will present basic family financial management trends and procedures, including insurance and record-keeping. UW Law Prof. Richard Z. Kabaker's presentation will outline the advantages of having a will, how to aid an attorney in preparing a will, and how gift taxes affect the planning.

Theodore W. Zillman, associate director of deferred giving and estate planning for the foundation, will discuss charitable gifts.

UW System Regent Walter F. Renk, Sun Prairie, will report on his recent tour of Russia at the luncheon session.

Additional information and registration forms are available at the UW Foundation office, 702 Langdon st., Madison 53706, or by calling (608) 263-4545. The fee is \$7.50 per person, this including coffee at 8:15 a.m. and lunch.

uw news

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Release: Immediately

3/13/73 jb

*Institutes
Estate
Planning*

MADISON--Experts on investments, home management, and taxes will headline the fifth annual Wisconsin Women's Estate Planning Seminar at the University of Wisconsin-Madison Center April 16.

Speakers will include Prof. Louise A. Young, School of Family Resources and Consumer Sciences, on "Financial Aspects of Home Management"; Prof. Richard J. Kabaker, Law School, "Legal and Tax Consideration: Wills, Trusts, Forms of Ownership, Estate and Gift Taxes; and Dr. John R. Pike, executive director of the State Investment Board, "Investment Considerations."

A question and answer period will follow each presentation.

The featured luncheon speaker will be Prof. Martin B. Loeb, director of the UW-Madison School of Social Work. His topic will be "Retirement-Challenges and Opportunities."

Sponsored by the UW Foundation, the seminar is open to all Wisconsin women, not only UW alumnae. It will begin with registration and a coffee hour in the center's Blue Lounge at 8 a.m., followed by orientation and welcome by Robert B. Rennebohm, foundation executive director, at 8:50 a.m.

Fee for the session is \$6, this including the coffee hour and luncheon. Women may make reservations by writing to the UW Foundation, Wisconsin Center, 702 Langdon st., Madison 53706.

Theodore W. Zillman, the foundation's associate director for deferred giving and estate planning, is program chairman.

uw news

From The University of Wisconsin-Madison / University News and Publications Service, Bascom Hall, Madison 53706 / Telephone (608) 262-3571

Release:

Immediately

11/30/72 mcg

*Institutes -
Estate Planning*

MADISON--Men and women attending the annual Seminar on Family Financial and Estate Planning Saturday in the Wisconsin Center will be given ample time to ask questions of the experts on investments, insurance, taxes, and retirement who are scheduled to speak.

The seminar is sponsored by the University of Wisconsin Foundation and directed by Theodore W. Zillman, associate director.

Speakers and topics for the morning sessions beginning at 9 a.m. are UW business Prof. Stephen L. Hawk, "Investment and Insurance Considerations," and law Prof. Stuart G. Gullickson, who will discuss legal and tax considerations in wills and trusts, as well as estate and gift taxes. Both have allotted 25 minutes for questions following their prepared statements.

The afternoon session with Anita Burr of the School of Social Work as featured speaker will be devoted to "Challenges and Opportunities of Retirement." Well-acquainted with the problems of aging, Miss Burr was a nurse for 11 years before joining the faculty here as a clinical instructor. She is a member of the executive committee of the Madison Committee on Aging and author of a study on "Social Service Guidelines for Health Facilities." A half-hour question period will follow her talk, with adjournment scheduled for 3 p.m.

Applications for the seminar are still being accepted at the Center, 702 Langdon st., at \$7.50 for singles and \$14 for married couples. The fee includes morning coffee and noon luncheon.

Robert B. Rennebohm, executive director of the foundation, will welcome those attending at 8:50 a.m.

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Release:

Immediately

11/24/72 mcg

*Instituted
Estate
Planning
Plan*

MADISON--Prof. Stephen L. Hawk, specialist in securities and investments for the University of Wisconsin-Madison School of Business, will launch the annual Seminar on Family Financial and Estate Planning in the Wisconsin Center Dec. 2.

He will discuss investments as well as insurance, beginning at 9 a.m. and answer questions from his audience following his prepared address.

Prof. Hawk teaches the unique class in Applied Security Analysis and Investment Management, the only college course in the nation with \$100,000 for students to invest. The money was given in 1970 by the Brittingham Foundation "to finance a course providing practical experience in the field of investments and a realistic exposure to the problems and subtleties of the market."

Students enrolled must show an annual profit to pass the course. Profits are returned to the fund, which will be used for scholarships when it reaches \$500,000. Last year's class earned \$18,850.

Prof. Hawk holds three degrees from Wisconsin, including the 1969 Ph.D. For the past three years he has been named "best teacher" by graduating seniors. Last May he won the \$1,000 Standard Oil Teaching Award. In demand as lecturer off-campus, he speaks annually to many investment clubs.

Other seminar speakers are law Prof. Stuart G. Gullickson, whose topic includes wills, trusts, and estate and gift taxes; and Anita Burr, clinical instructor in social work, who will discuss the challenges and opportunities of retirement.

Registrations are being accepted at the Wisconsin Center, 702 Langdon st., at \$7.50 for singles, \$14 for husband and wife. The fee includes the noon luncheon.

The seminar is sponsored by the UW Foundation. Theodore W. Zillman is chairman.

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The seminar is sponsored by the UW Foundation. Theodore W. Zillman is chairman.

Release: **Immediately**

*Institutes
Exhibit
Forward*
11/13/72 mcg

MADISON--Experts in business, law, and social work of the University of Wisconsin-Madison will be featured speakers for the annual Family Financial and Estate Planning Seminar at the Wisconsin Center Dec. 2.

The sponsoring UW Foundation selected a Saturday date so that interested husbands and wives can take part together this year.

Business Prof. Stephen L. Hawk will begin discussion at 9 a.m. with "Investment and Insurance Considerations." For the past three years he has been named "best teacher" by graduating seniors in business for his "thorough preparation, careful organization, and clear and logical presentation." Last May he was voted the \$1,000 Standard Oil Teaching Award.

He will be followed by Prof. Stuart G. Gullickson, Law School, explaining "Legal and Tax Considerations." A veteran of 17 years of law practice in Merrill and Wausau, he joined the faculty in 1967 to direct the general practice and trial advocacy courses. He holds the Smongeski Research Professorship of Law, named for the late Stevens Point attorney.

Anita M. Burr, clinical instructor in social work, will be the afternoon speaker, discussing "Your Retirement--Challenges and Opportunities." She was a nurse for 11 years before earning her UW master's degree in social work in 1963. Well-acquainted with problems of the aging, she has published a study titled "Social Service Guidelines for Health Facilities," and is a member of the executive committee of the Madison Committee on Aging.

There will be a question and answer period following each prepared address.

Interested persons may register for the seminar at the Wisconsin Center, 702 Langdon st. The fee of \$7.50 for one, \$14 for husband and wife, includes morning coffee and noon luncheon.

Release:

Immediately

10/24/72 mcg

*Institutes -
Estate
Planning
Seminar*

MADISON--So that husbands and wives can take part together in the annual Family Financial and Estate Planning Seminar sponsored by the University of Wisconsin Foundation, the date this year has been set for Saturday Dec. 2, in the Wisconsin Center.

Theodore W. Zillman, associate director of the foundation and chairman of the all-day event, explains that "single persons or those unaccompanied by their spouses are equally welcome."

The program begins with registration and coffee at 8:15 a.m. in the Center Blue Lounge and moves to the auditorium for morning sessions. Speakers are Prof. Stephen L. Hawk, UW Graduate School of Business, on "Investment and Insurance Considerations," and Prof. Stuart G. Gullickson, UW Law School, "Legal and Tax Considerations: Wills, Trusts, Forms of Ownership, and Estate and Gift Taxes."

Following luncheon in the center dining room, Prof. Anita Burr of the School of Social Work will discuss "Your Retirement-Challenges and Opportunities."

All speakers will answer questions following their prepared lectures.

Reservations may be made through the center, 702 Langdon st., at \$7.50 each or \$14 for husband and wife.

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Release: p.m.'s Monday, April 24

4/21/72 vh

Institute
State
Community

MADISON--Private funds created the University of Wisconsin Elvehjem Art Center and private support still remains vital to advancement of the University's art collection and programs held there, the director of EAC declared Monday.

Millard F. Rogers spoke at the luncheon for state women enrolled in a one-day seminar on family financial and estate planning. UW Profs. Stephen Hawk, business, Louise Young, home management, and Gordon Baldwin, law, served as faculty for the day of instruction in keeping the family's financial "house" in order.

Rogers pointed out that the same University of Wisconsin Foundation which was sponsoring the Monday learning sessions for women had raised \$3.5 million from donors--including an initial \$1 million from the Brittingham Trust--to create EAC. The result has been one of the finest facilities for art history instruction in the country, rating among the top three university art museums in the nation.

Today state funds pay salaries for the art history and center staffs, Rogers continued, but funds and art given by private sources remain the only means by which the center can expand the art collection, mount exhibitions, and put out various publications.

Establishment of the long-awaited art center less than two years ago has done much to stimulate that support and interest, Rogers indicated, and pointed to organizations such as the Friends of the Elvehjem Art Center with a membership nearing 500, and the EAC Docents. Docents (women from the Madison and University community) serve as volunteer guides for tours of the center, some arranged for school children, others for adults.

Add one--Rogers speech

He also said that while it took some 82 years since the University's art collection was begun in 1885 to acquire 1,200 art objects, it has taken less than the past five years to advance that number to 2,000.

Even so, Rogers declared, the collection as a vital instrument for teaching art history has many blank spots. It will take many more donors to fill those gaps, he said, and to bring the collection up to a rank among American campus art collections equal to the very high rank which EAC as a modern art-oriented physical plant holds among other American university art museums.

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From The University of Wisconsin-Madison / University News and Publications Service, Bascom Hall, Madison 53706 / Telephone (608) 262-3571

Release:

Immediately

3/8/72 vh

*Family Planning
Estate Planning
Seminar*

MADISON--A family and estate planning seminar, planned especially for Wisconsin women, will be presented at the University of Wisconsin-Madison April 24.

Sponsored by the UW Foundation, the seminar will provide instruction by experts toward getting one's financial house in order. Not only UW alumnae, but any woman in need of such help may register.

Basic considerations such as record keeping, income tax returns, Social Security, and insurance are among subjects to be explored. Investments, wills, forms of ownership, trusts, and estate and gift taxes will also be covered.

The seminar fee of \$6 provides for luncheon and a coffee hour at the Wisconsin Center. The center and adjacent Alumni House are the sites for all seminar sessions.

Reservations, accompanied by checks payable to the UW Foundation, should be sent to the Wisconsin Center, 702 Langdon st., Madison 53706.

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uw news

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Release:

Immediately

4/11/72 vh

*Institute -
Estate
Planning
Seminar*

MADISON--Millard F. Rogers, director of the Elvehjem Art Center, will be guest speaker at the luncheon for enrollees in the Women's Family Financial and Estate Planning Seminar on the University of Wisconsin-Madison campus April 24.

Women from all areas of Wisconsin are expected to attend the one-day program stressing family finances.

Sponsored annually by the UW Foundation, the seminar borrows its faculty from campus experts in the fields of law, business, and home management.

Rogers, who directs one of the nation's finest campus art centers, third largest in the country, will tell his audience what it means to the University and general public to have so fine a hub of art, how the superb physical plant has served to expand University holdings, and how vital private funds have been in fostering both the center and the collections it holds.

The former curator at the Toledo Museum of Art returned recently from London where he carried out research for a new publication on 19th century American painter J.R. Stearns, and visited some 26 dealers located in this great art center.

Enrollment in the seminar still is possible for any woman seeking instruction in keeping the family's financial affairs in order. Reservations should be made by letter to the Wisconsin Center, 702 Langdon st., Madison 53706, where all sessions will be held. The accompanying check of \$6, covering seminar fee and luncheon, should be made payable to the UW Foundation.

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*Institute
Estate
Planning*

Release:

Immediately

4/3/72 vh

MADISON--University of Wisconsin professors of business, law, and home management will become faculty for the Wisconsin Women's Family Financial and Estate Planning Seminar scheduled for April 24.

The day of instruction for women in handling family finances is sponsored each year by the UW Foundation. Open to UW alumnae, it is also open to any woman in need of such help.

Sessions at the Wisconsin Center, Madison, will begin at 9 a.m. with Prof. Louise A. Young covering basic considerations such as record keeping, income tax returns, Social Security, and insurance. A member of the faculty since 1945, Prof. Young holds a superior service award from the U.S. Department of Agriculture for her contributions to family financial planning.

Prof. Stephen L. Hawk, Graduate School of Business, will teach the session in investments beginning at 10 a.m. Hawk is a specialist in corporation finance and security analysis. One of his courses currently receiving special attention is supplied with funds from the Brittingham Trust so that students may learn about investments by managing real money.

Prof. Gordon B. Baldwin of the Law School will cover wills, forms of ownership, trusts, and estate and gift taxes, beginning at 11:15. On the Madison campus staff since 1957, Baldwin holds a law degree from Cornell University. Author of a text on corporation law, he has also contributed to the field of international law and served a chair in this discipline at the U.S. Naval War College.

Add one--Women's Family Financial and Estate Planning Seminar

The seminar fee of \$6 also covers a 12:20 luncheon. Women can make reservations by writing to the Wisconsin Center, 702 Langdon st., Madison 53706. The accompanying check should be made payable to the UW Foundation. Theodore W. Zillman, associate director for deferred giving and estate planning, UW Foundation, said any further questions about the seminar should be directed to him at the above address.

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Release: Immediately

4/22/71 mcg

*Institute -
Estate
Planning
Seminar*

MADISON--More than 140 women around the state have signed up for the Women's Estate Planning Seminar sponsored by the University of Wisconsin Foundation on the Madison campus next Tuesday.

The seminar is being held for the third year under direction of Theodore W. Zillman, associate director of the foundation.

The timetable for the day is as follows:

8:15 a.m.--Registration, Wisconsin Center; coffee hour, Alumni House Lounge;

9 a.m.--Orientation and welcome by Robert B. Rennebohm, executive director of the foundation;

9:10 a.m.--"Building Your Estate Through Investments," Prof. Stephen L. Hawk, Graduate School of Business;

9:30 a.m.--Questions and answers on investments, Prof. Hawk;

10:10 a.m.--"Safeguarding Your Estate-Insurance, Record Keeping, Income Tax Returns," Prof. Louise A. Young, School of Family Resources and Consumer Sciences;

11 a.m.--"Disposition of Your Estate--Legal and Tax Considerations," Prof. August C. Eckhardt, Law School;

12:20 p.m.--Luncheon and speaker, Prof. Robert E. Gard, community arts and development, discussing lore and legends of Wisconsin;

2 p.m.--Discussion sections led by Prof. Arnon R. Allen, Law Extension; Prof. Stuart G. Gullickson, law; Prof. Richard M. Heins, business; Prof. Young; and Zillman.

4 p.m.--Adjournment.

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Release: **Immediately**

III *Institute*
3/23/71 mcg

MADISON--Prof. Robert E. Gard of the University of Wisconsin department of community arts development will reveal unpublished lore and legends of Wisconsin to state women attending the third *(Women's Estate Planning)* seminar at Madison April 27.

Sponsored by the UW Foundation for all Wisconsin women, the seminar will bring together UW experts on investments, taxes, and insurance.

Prof. Gard has been a member of the UW faculty since 1945, when he came to the campus after teaching at his alma mater, the University of Kansas, and Cornell University, where he earned the master's degree in 1938. In 1953 he surveyed the cultural arts in Great Britain and in 1961 he was U.S. delegate to the World Theatre Congress in Vienna.

Prof. Gard, who held the Fulbright professorship at the University of Helsinki in 1959-60, returned there as visiting professor in 1963. He was awarded the gold medal of honor of the Finnish National Theatre.

Among his many books are "Wisconsin Is My Doorstep"; "Grassroots Theatre"; "Cardiff Giant"; "Wisconsin Lore"; "Scotty's More"; "The Big One"; and "University Madison USA," his latest.

Other speakers and discussion leaders for the seminar are Prof. Louise A. Young, Family Resources and Consumer Sciences; Profs. Stephen L. Hawk and Richard M. Heins, Graduate School of Business; Profs. Stuart G. Gullickson and August C. Eckhardt, Law School; and Prof. Arnon R. Allen, Extension Law.

Women wishing to attend may make reservations at the Wisconsin Center, 702 Langdon st. The fee is \$5.

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HW

Institute
Estate
Planning

From The University of Wisconsin News and Publications Service, Bascom Hall, Madison 53706 • Telephone: (608) 262-3571

Release: **Immediately**

4/7/71 mcg

ATTENTION: WOMEN'S EDITOR

MADISON--Prof. Louise A. Young, expert in family economics and home management at the University of Wisconsin, will lead a discussion of the consumer movement during the Wisconsin Women's Estate Planning seminar on the Madison campus April 27.

The seminar in the Wisconsin Center is sponsored for the third year by the UW Foundation for all state women. Included are lectures by UW experts on law and business and a discussion of Wisconsin lore and legend by Prof. Robert E. Gard.

A member of the faculty here since 1945, Prof. Young received the 1958 superior service award from the U.S. Department of Agriculture for her contributions in family financial planning and direction of the Wisconsin Farm and Home Development Program.

Other discussion leaders:

Prof. Arnon R. Allen, Extension law, former Madison attorney, and director of institute for continuing legal education sponsored by the Wisconsin State Bar, UW, and Marquette University;

Prof. Stuart G. Gullickson, Law School, former attorney in Merrill and Wausau, past governor of the Wisconsin Bar Association, director of the general practice course in the Law School;

Prof. Richard M. Heins, insurance specialist in the School of Business, former teacher at UCLA and research associate on the Governor's Retirement Study Commission of Wisconsin.

Other sessions include "Building Your Estate With Investments," Prof. Stephen L. Hawk, business; "Safeguarding Your Estate-Insurance, Record Keeping, Income Tax Returns," Prof. Young; and "Disposition of Your Estate-Legal and Tax Considerations," Prof. August C. Eckhardt, Law School.

Reservations at \$5 each may be made through the Wisconsin Center, 702 Langdon st., Madison 53706. Out-of-town registrants will receive hotel information.

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Release:

Immediately

3/9/71 mcg

II
Institutes
Estate
Planning

MADISON--Prof. Stephen L. Hawk of the University of Wisconsin School of Business will launch the third annual Wisconsin Women's Estate Planning seminar in Madison April 27 with a discussion of "Building Your Estate Through Investments."

His talk in Wisconsin Center auditorium will be followed by a question and answer session. The investment segment of the all-day seminar has raised many questions in previous years.

The event sponsored by the UW Foundation is directed by Theodore W. Zillman for all state women. It follows by one week the annual Wisconsin Women's Day scheduled by the UW Alumni Association. Robert B. Rennebohm, executive director of the foundation, will welcome the more than 125 women expected to attend.

Prof. Hawk was born in Chicago and educated there and at Wisconsin, where he earned the bachelor of business administration degree in 1963, the master's in 1964, and the Ph.D. in 1969. He teaches courses in corporation finance and security analysis. Among the latter is one titled "Applied Security Analysis and Investment Management," in which students are using a large fund contributed by the Brittingham Trust to learn about investments.

Other morning speakers are Prof. Louise A. Young, School of Family Resources and Consumer Sciences, "Safeguarding Your Estate--Insurance, Record Keeping, and Income Tax Returns," and Prof. August C. Eckhardt, Law School, "Disposition of Your Estate--Legal and Tax Considerations."

After a break for lunch and a talk on Wisconsin lore by Prof. Robert E. Gard of UW Community Arts and Development, the group separates into discussion sections.

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uw news

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I 2/23/71 mcg

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Sponsored by the University of Wisconsin Foundation, the seminar follows by one week the annual Women's Day scheduled by the UW Alumni Association on the Madison campus.

Registration in the center and the coffee hour in Alumni House lounge will precede a 9 a.m. orientation session and welcome by Robert B. Rennebohm, executive director of the foundation, in the center auditorium.

Morning speakers include Prof. Stephen L. Hawk, School of Business, "Building Your Estate-Investments," followed by a question period; Prof. Louise A. Young, School of Family Resources and Consumer Sciences, "Safeguarding Your Estate--Insurance, Record Keeping, Income Tax Returns"; and "Disposition of Your Estate--Legal and Tax Considerations," Prof. August C. Eckhardt, Law School.

Featured speaker at the luncheon in the center will be Prof. Robert E. Gard, UW Community Arts and Development, who will discuss UW lore and legend, using material collected since the publication of his popular book on the University.

Discussion sessions from 2 to 4 p.m. will end the all-day seminar. Faculty discussion leaders are Profs. Arnon R. Allen, Extension Law; Stuart G. Gullickson, Law School; Richard M. Heins, business; Miss Young; and Theodore W. Zillman of the foundation, who planned the program.

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feature story

Institute of
Estate Planning
Seminar

From The University of Wisconsin News and Publications Service, Bascom Hall, Madison 53706 • Telephone: (608) 262-3571

Release: **Immediately**

5/13/70

Attention: Women's Editor

By HAZEL MC GRATH

MADISON--"How much cash can I give my daughter without gift tax?"

"What happens when parents who have named a guardian for their children by will are killed in an accident and the kids can't stand the guardian? Are they stuck with him?"

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The answers in order, are: Up to \$3,000 a year; not necessarily; and the lowest legal rate.

Questions like these were asked and answered during the recent spring Women's Estate Planning Seminar in the Wisconsin Center at the University of Wisconsin-Madison.

The day-long annual event is sponsored by the UW Foundation, which raids the law and business faculties to gather the experts. It is one in the series of seminars which bring thousands of adults to the campus each year because of the "Wisconsin Idea" that a university should educate all.

Many of the 117 women came because they professed to know nothing about the subjects discussed, and their questions during the afternoon sessions proved they had much to learn.

Others knew some of the lingo and posed such queries as "What are the merits and disadvantages of split-funded retirement programs for small businesses?" and "What can dissolve a joint tenancy?"

Add one--estate planning seminar

A surprising number were young mothers in their 20's and 30's. They were interested in discussing mortgage insurance and "What happens to their estate when husband and wife perish in the same accident?" and in security for their children.

Many women in their 40's and 50's asked questions about their legal rights as well as about gift taxes, estate taxes, and wills.

"If the husband gives money to the wife and she makes money on it in the stock market, is it HER money?" they asked.

"What proof is needed to show the contribution of each marriage partner to a large investment held jointly?" they wondered.

One middle-aged widow came "to get information so I won't make the same mistakes with money my husband made." One woman said her husband sent her. Another revealed: "My husband and I made wills when we were married 30 years ago and never changed them, though we now have four children. I want to learn all I can about wills and get ours changed, because he just won't do anything about it."

After welcoming remarks by Robert B. Rennebohm, executive director of the foundation, and Theodore E. Zillman, director in charge of estate planning, the seminar got under way with a lecture by Prof. George R. Currie of the Law School, former chief justice of the Wisconsin Supreme Court.

He defined "Legal Aspects of Estate Planning," including objectives, types of property, advantages of sole ownership, joint tenancy, and tenancy in common. "One of the co-owners of property can destroy the tenancy by conveying away his share," he warned.

He discussed types of trusts, life estates, what can be done with wills, how to go about making them. "Don't keep any secrets from your attorney that might influence his advice," he cautioned his audience.

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Add two--estate planning seminar

Because women own about 70 per cent of the assets in the United States, and control almost 100 per cent, "It is appropriate to speak to ladies who have such power," he began. He discussed ways to make substantial annual tax-free gifts to children and grandchildren; the best time of year, tax-wise, to make charitable gifts; relative size of estate taxes and gift taxes; and creating trusts.

Business Prof. Stephen L. Hawk ended the morning session with a lecture on life insurance estate planning.

The afternoon was devoted to three discussion sections--basic, intermediate, and advanced--chosen by each woman according to the extent of her knowledge. Questions and answers flowed freely until 3:30 p.m., when the seminar ended. Moderators were Law Prof. Stuart G. Gullickson; Extension Law Prof. Arnon R. Allen; and Business Profs. Richard M. Heins and Gordon H. Johnson.

Surfeited with facts, the women carried home bulging folders of materials on joint tenancy (boon or boomerang?), probating an estate, drafting of wills, and the federal gift tax. Included was the 40-page U.S. estate tax return. To get enough copies to go around, sponsors had to send out an S.O.S. to federal offices in three neighboring states.

Tucked into the pocket of the folder was a reminder that the foundation was set up to help the University with funds, and that anyone with extra cash could easily find a useful home for it in foundation projects.

Also included was a form enabling the women to state their reactions to the day, to tell sponsors what they'd liked most and least, and what they'd like changed. Their replies will give form and content to the 1971 version.

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uw news

From The University of Wisconsin News and Publications Service, Bascom Hall, Madison 53706 • Telephone: (608) 262-3571

Release: **Immediately**

*Institutes, Conferences,
etc.*
4/7/70 mcg

MADISON--Faculty experts in law and business will lead discussion sections geared to three levels of knowledge during afternoon sessions of the Women's Estate Planning Seminar on the University of Wisconsin Madison campus April 20.

Sponsored for the second year by the University of Wisconsin Foundation, the seminar precedes by one day the annual spring Women's Day on the campus. Many women will attend both events.

Discussion leaders are Prof. Stuart G. Gullickson, Law School; Prof. Arnon R. Allen, Extension law; and Profs. Richard M. Heins and Gordon H. Johnson, Graduate School of Business.

Women will choose one of three sections: Section A, for those with little or no legal, tax, insurance, or investment experience; Section B, for those who attended last year's campus seminar or a similar one elsewhere; and Section C, for women with first-hand acquaintance with estate planning and its problems. Sections begin at 1:40 p.m.

Prof. Gullickson, a member of the UW law faculty since 1967, holds the J.D. degree of Wisconsin. From 1950 to 1957 he practiced law in Merrill, then moved to Wausau in 1957. Currently director of the general practice course at the Law School, he is a former member of the Board of Governors of the Wisconsin Bar Association.

Add one--women's estate planning seminar

Allen is an associate professor of law in Extension who taught at the University of Illinois and practiced law in Madison before joining the faculty. He has been responsible for a number of programs of legal education for professional and lay groups.

Heins is professor of insurance, law, and accounting. He holds the B.B.A., M.B.A., LL.B., and Ph.D. degrees of Wisconsin. He served on the Governor's Retirement Study Commission and as special legal consultant to the U.S. Senate judiciary committee on insurance matters. He has written books and many articles on insurance and government, and risk management.

Johnson is assistant professor of law and accounting and holder of the B.B.A., LL.B., LL.M and J.D. degrees of Wisconsin. He has taught at the University of California at Berkeley and served two years on a Ford Foundation assignment at the University of Singapore.

The program begins in the Wisconsin Center at 8:15 a.m. with registration and coffee. At 9 a.m. the women are welcomed by Robert B. Rennebohm, executive director of the UW Foundation, and at 9:10 a.m. Prof. George R. Currie of the UW Law School, former chief justice of the Wisconsin Supreme Court, launches the day's learning activities with his discussion of "Legal Aspects of Estate Planning."

Other morning speakers are faculty members of the UW Graduate School of Business: Prof. J. Bruce Sefert, to discuss "Federal and State Taxes in Estate Planning," and Prof. Stephen L. Hawk, "What Insurance and Investment Counsellors Can Contribute to Estate Planning."

Luncheon will be served at 12:20 p.m. in the Wisconsin Center.

Reservations at \$5 each may be made at the Wisconsin Center, 702 Langdon st., Madison 53706.

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Release: **Immediately**

3/24/70 mcg

Institutes
Estate Planning
Seminar

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They are Prof. J. Bruce Sefert, who will discuss "Federal and State Taxes in Estate Planning" at 10:10 a.m.; and Prof. Stephen L. Hawk, whose topic is "What Insurance and Investment Counsellors Can Contribute to Estate Planning" at 11:10 a.m.

The seminar is conducted by the UW Foundation for the second year. It precedes the 10th annual Women's Day sponsored on the campus by the UW Alumni Association April 21. Many women have decided to attend both.

Prof. Sefert is a graduate of the University of Minnesota who holds the master's degree in business administration from Wisconsin, where he lectures on accounting and taxation. He gained his wide background in his specialty working as revenue agent, group supervisor, chief of the audit division for Minnesota, and director of the audit division for the U.S. Internal Revenue Service. His teaching experience includes assignments at the University of Minnesota and Macalester College.

Prof. Hawk, who teaches courses in corporation finance and security analysis, holds three UW degrees: the B.B.A. of 1963; the M.B.A. of 1964; and the Ph.D. acquired in 1969.

Add one--women's estate planning seminar

The day will include a discussion of "Legal Aspects of Estate Planning" by former Chief Justice George R. Currie of the Wisconsin Supreme Court who is now UW visiting professor of law; and afternoon sessions led by Profs. Arnon R. Allen, Extension law; Stuart G. Gullickson, Law School; and Richard M. Heins and Gordon H. Johnson, Graduate School of Business.

Registration for the day begins at 8:15 a.m. in the Wisconsin Center, with coffee served in Alumni House lounge. Robert B. Rennebohm, executive director of the foundation, will welcome the women at 9 a.m.

Reservations at \$5 each, including lunch and morning coffee, may be made at the Wisconsin Center, 702 Langdon st., Madison 53706. Registrants from other cities will be sent hotel information.

Theodore W. Zillman, associate director for deferred giving and estate planning of the foundation, is in charge of the seminar.

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UW news

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Release: **Immediately**

*Institutes, Etc.
Short Course,
Estate Planning
Seminar*
3/9/70 mcg

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Now visiting professor of law at Wisconsin, Prof. Currie will begin his discussion of "Legal Aspects of Estate Planning" at 9:10 a.m. Registration in the Wisconsin Center is at 8:15 a.m., and orientation and welcome by Robert B. Rennebohm, executive director of the foundation, is scheduled for 9 a.m.

Prof. Currie is a native of Wisconsin who attended Oshkosh State Teachers College, taught for three years, then entered the University to study law. As a student he was named editor-in-chief of the Wisconsin Law Review and inducted into Order of Coif, honorary society. He was awarded the LL.B. degree in 1925 and thereafter practiced law in Sheboygan for 26 years. He was appointed to the Wisconsin Supreme Court in 1951 and elected for a full 10-year term in 1957. He became chief justice in 1964 and retired in 1968.

- more -

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###

March 3, 1965

RICHARD M. HEINS
Professor of Commerce

Richard M. Heins, an insurance authority, has received four academic degrees from the University of Wisconsin.

Dr. Heins received his Bachelor of Business Administration degree in accounting (1949) and his Master of Business Administration degree in Insurance (1950), his Doctor of Philosophy in insurance, law, and accounting (1954), and the Bachelor of Laws degree (1957), all from UW. During 1954-55 he studied at the University of California at Los Angeles for the LL.B. degree.

From 1948-52 Dr. Heins was a graduate teaching assistant at UW and in 1952-53 he served as lecturer in insurance at UCLA and had charge of the insurance curriculum and its development. He then became Associate Professor of Insurance at UCLA from 1953-56.

He served as visiting lecturer at UW during the summer session of 1955, and became an Associate Professor in 1956, a Full Professor in 1961.

Professor Heins also has been active as a research associate on the Governor's Retirement Study Commission in Wisconsin, and has written and published a large number of research articles on insurance, risk and public policy.

He is a member of the American Finance Association, American Risk and Insurance Association, Society of Chartered Property and Casualty Underwriters, American Society of Insurance Management, and the Wisconsin Bar Association. In 1959-1961 he served as special legal consultant to the Anti-trust and Monopoly Subcommittee of the U.S. Senate Judiciary Committee conducting an investigation of state insurance supervision.

Dr. Heins has two books: Insurance and Government, McGraw-Hill, and coauthored Risk, Management and Insurance also by McGraw-Hill.

The professor is a native of Platteville, Wisconsin and married the former Ruth Esther Maurer in 1950. The couple has four daughters, Sheryl, Deborah, Suzanne, and Tammalyn.

feature story

Institute pt
Estate Plan
Seminar

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Release: **Immediately**

5/13/70

Attention: Women's Editor

By HAZEL MC GRATH

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*Institutes, etc.
Estate Planning*
4/17/70 mcg

MADISON--More than 125 women from many parts of the state will spend Monday in the Wisconsin Center on the University of Wisconsin campus learning from experts the important things to know about estate planning.

Launched last year by the UW Foundation, the Wisconsin Women's Estate Planning Seminar was scheduled again by popular demand one day before the annual Women's Day sponsored by the Alumni Association. Many women attend both events.

Topics to be discussed during morning sessions are "Legal Aspects of Estate Planning," Prof. George R. Currie, UW Law School, former chief justice, Wisconsin Supreme Court; "Federal and State Taxes in Estate Planning," Prof. J. Bruce Sefert, business; and "What Insurance and Investment Counsellors Can Contribute to Estate Planning," Prof. Stephen L. Hawk, business.

Following luncheon at 12:20 p.m., the women will separate into discussion sections geared to basic, intermediate, and advanced knowledge. Discussion leaders are Prof. Stuart G. Gullickson, Law School; Prof. Arnon R. Allen, Extension Law; and Profs. Richard M. Heins and Gordon H. Johnson, business.

Theodore W. Zillman, associate director for deferred giving and estate planning, is in charge for the foundation, this year marking its 25th anniversary.

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Release: Immediately

2/19/70 mcg

MADISON--The University of Wisconsin Foundation will sponsor the second annual Women's Estate Planning Seminar for all interested Wisconsin women April 20 on the Madison campus of the University.

Meetings in Wisconsin Center and Alumni House will present faculty experts in law and business to discuss all aspects of estate planning. Theodore W. Zillman, associate director for deferred giving and estate planning of the Foundation, is in charge of the program. It is followed the next day by the 10th annual Women's Day on the campus.

Visiting Law Prof. George R. Currie, former chief justice of the Wisconsin Supreme Court, will open the program at 9 a.m. with "Legal Aspects of Estate Planning." Other morning speakers are Profs. J. Bruce Sefert and Stephen L. Hawk of the UW Graduate School of Business.

Luncheon in the center will be followed by discussion sessions geared to three groups of women: those who lack basic legal, tax, insurance, or investment experience; those with some experience; and those with first-hand acquaintance with the problems.

Afternoon discussion leaders are Prof. Arnon R. Allen, Extension law; Prof. Stuart G. Gullickson, Law School; and business Profs. Richard M. Heins and Gordon H. Johnson.

Reservations at \$5 each may be made with the Wisconsin Center, 702 Langdon st., Madison 53706. Hotel information will be sent to those women interested in staying over for Women's Day.

UW news

II

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Release: **Immediately**

3/9/70 mcg

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