THREE ALUMNAE BUILDING THE FUTURE

LESLIE BENMARK (‘67, ’70)
Benmark once heard that a woman shouldn’t study engineering, which ignited her determination to succeed in the industrial engineering program at the University of Tennessee, Knoxville. Her highly decorated career with Dupont blazed trails for women in the field, and she’s extended her legacy through many charitable ventures, including estate gifts to UT.

“UT has given great financial planning advice, providing lists of estate planning resources and leading me through a property gift to the university.

Women have a unique viewpoint, and I’m glad to lend my voice at UT, from board memberships to financial support.”

LISA EDWARDS REED (‘86)
Reed and her husband, Greg (‘85, ’88), began giving back to the university early in their marriage. That support increased from generous annual gifts to a portion of their estate with the development of their successful careers. Reed believes in the importance of staying connected at UT, representing women’s perspectives in financial giving and board involvement.

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Consideration of different perspectives makes the university its strongest. UT is the foundation for all that Greg and I have achieved. We believe strongly in giving back as Volunteers, not only through our annual gifts and specific endowments, but also through our estate as a legacy that will make a difference for future students.”

MISSY WALLEN ('74)

Wallen’s first major gift to UT established the Faye Julian Professorship because Professor Julian took 17-year-old Wallen under her wing. Wallen has always made her UT philanthropy personal because she says she owes UT for her 52-year success in banking and financial services.

As many human obstacles as I faced, there were just as many people who helped me, like Faye. I want to be this kind of support to future generations. It’s my duty to help other women in the workplace and community, to pay it forward. The biggest legacy I can leave is not what I’ve accomplished but what I’ve helped others accomplish. That’s why it’s important to me to invest in UT and its students.”

YOU, TOO, CAN MAKE A DIFFERENCE

Consider using your estate plan to support the next generation of UT students. Your foresight could ignite the torch for ambitious Vols from all walks of life. Contact us at giftplanning@utk.edu or 865-974-2370 to start the conversation today.

OUR GIFT TO YOU

No matter your income, marital status, or life situation, estate planning is essential. Learn how a small amount of effort today can bring peace of mind to you and your loved ones in our FREE guide Five Estate Planning Steps for Women. Return the enclosed reply card to get yours today.
HAS YOUR LIFE CHANGED? THEN SO SHOULD YOUR ESTATE PLAN

Ever look at the calendar and marvel at what year it is? Has that much time really gone by?

With time’s passage comes change: Babies are born, and loved ones depart. We move to a new town or start a new job. Laws get revised. We discover a new passion, a new cause.

When changes happen, it’s important that your estate plan reflects them. Here are key categories to consider:

» **Timing:** Did you write your will prior to 2001? A lot has changed in the world of estate taxes. For example, the amount you can leave to heirs without paying federal tax rose from $675,000 to more than $12 million in 2022.

» **Relationship status:** A change in your marital or long-term relationship means you may want to alter your will and beneficiary designations.

» **Children:** Perhaps you now have children or grandchildren, and you want to ensure you have provided for them. Or, you created a will when the kids were young and they are now grown and financially stable.

» **Residence:** Legal requirements and taxes vary by state. If you’ve moved to a new state since creating your will, you’ll want to see what impact that may have.

» **Family and friends:** Our connections with people sometimes shift over time. You may want to increase or decrease the amount left to certain individuals or add and remove them from your will or beneficiary designations.

» **Charitable causes:** If you have formed connections with certain nonprofits and want to take your support to the next level, you can set up gifts in your estate plan to ensure your values endure after your lifetime.

When creating or updating your will and other parts of your estate plan, we hope you consider the role the University of Tennessee, Knoxville, has played in your life and how you can continue making a difference for years to come. **Contact us at giftplanning@utk.edu or 865-974-2370 today to discuss your giving options.**
CHANGE YOUR BENEFICIARY, CHANGE THE WORLD

Do you want to change the world?

It’s an easy question. Of course, you want to make a difference. Of course, you want to safeguard what matters most to you. The values that have shaped your life and given it rich meaning are the root of the legacy you’ll leave behind.

While the sentiment is easy to muster, it isn’t always easy to act upon. If you care deeply about UT and our students, how do you ensure your passion lasts far into the future?

Fortunately, there is a simple way to do this—and it’s easier than you think. A beneficiary designation gift is simple and does not cost you anything now. Instead, it allows you to take the savings you have accrued and put it to good use.

You can also specify percentages so that your loved ones are protected. You can designate beneficiaries for the following:

- Retirement plans
- Individual retirement accounts (IRAs)
- Life insurance policies
- Donor advised funds
- Bank or brokerage accounts

The legacy you leave behind can change the lives of our students. The options are as endless as your generosity.

To learn more about how your beneficiary designations can make a big difference for UT students, request our FREE guide, *The Four Easiest Ways to Leave Your Legacy*, using the enclosed reply card.

Don’t keep it a secret! Once you have created your gift, be sure to share the news with those you include. Most financial institutions assume no responsibility to inform or administer beneficiary gifts.