



Planned Giving

You can establish planned gifts at all ages and stages of life. Planned gifts help donors meet current philanthropic goals and extend their generosity well into the future. There are many options available to support the PTF, some of which provide tax benefits today.

Bequest in Your Will or Trust

A bequest in your will or trust is one of the most powerful and versatile ways to help support the PTF. These gifts:

- Won't affect your assets or income during your lifetime.
- Are easy to arrange.
- Offer flexibility to address your changing needs.

Gift of Retirement Assets

Naming the PTF as a beneficiary of a retirement account, such as an IRA or 401(k), is a tax-savvy way to make a difference. Here's why: While these assets are heavily taxed when left to heirs, when they're left to a charitable organization like the PTF, these same assets pass tax free.

A gift of retirement assets is simple to arrange and easy to adjust should your plans change. Include the following information on a beneficiary designation form and return it to your plan administrator.

Legal Name: Paper Technology Foundation, Inc.
Federal Tax ID Number: 38-1691181

Charitable Gift Annuity

A charitable gift annuity (CGA) between you and WMU is a gift that gives back.

- You make an irrevocable gift of cash or appreciated securities. WMU will make fixed annual payments for life.
- You receive an immediate tax deduction, and if you use appreciated securities to fund your gift annuity, you could save capital gains tax, too.
- Your gift will benefit you now and paper engineering Broncos for years to come.

Your support ignites potential and can transform the lives of future paper engineers at Western Michigan University. Let us help you explore the many ways to leave a lasting Bronco legacy through the PTF.

Note: As you consider any charitable gift plan, please consult with your tax or financial advisor to determine the tax/financial implications for you and your family. The Western Michigan University Foundation does not provide legal or tax advice.

For more information or a personal CGA illustration, please contact:

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Help Us Engineer a Brighter Future for Paper Engineering Broncos



"Thank you so much for investing in my future so I can do the same one day for other students."

—Julia Burk, B.S.'21, Paper Engineering



WESTERN MICHIGAN UNIVERSITY
Paper Technology Foundation

From Pulp to Possibility: Nurturing What Comes Next



Is it any wonder that WMU’s College of Engineering and Applied Sciences boasts the nation’s premier paper engineering program? After all, Western Michigan University first debuted a school for Paper Technology in 1948, and in Kalamazoo County, the paper industry has played a vital role for more than 150 years.

With a global reputation of excellence, the Department of Chemical and Paper Engineering at WMU remains a pioneer in industry innovation and talent development. Under the guidance of renowned paper engineering researcher, Dr. Kecheng Li, the department offers students pursuing this dynamic field a world-class education—an experience that incorporates an outstanding curriculum, industry internships and hands-on learning in our state-of-the-art pilot facilities. These opportunities, both inside and outside of the classroom, enable Broncos to graduate with the knowledge, skills and confidence needed to make immediate and meaningful contributions to their employers.

Entering its 65th year, the Paper Technology Foundation (PTF) at WMU has supported our paper engineering program through curriculum oversight and enhancement, instruction, equipment provisioning, and most importantly, student scholarships. These critical investments empower us to not only continue attracting exceptional students and faculty, but also drive cutting-edge discoveries.

As we grow to meet rising enrollment and industry demand, we rely on the generosity of corporate partners, trustees, and alumni and friends like you. Your gifts make a powerful difference for WMU, for our students and for the ever-evolving field of paper engineering.

While change is inevitable, tomorrow shines with possibility. Will you join us in nurturing what comes next? Together, we can engineer an even brighter future for paper engineering Broncos and a better world for all.

Many Ways to Give, One Profound Difference

Annual Giving

Gifts from our alumni and friends help the PTF continue to offer an unprecedented scholarship program at WMU. This critical funding enables our students to pursue their purpose, succeed both inside and outside of the classroom, and thrive in the paper industry.

There are many ways you can make tax-efficient annual gifts, ensuring a steady source of resources to support our talented students, faculty innovations and research.

Gifts of Cash

It’s easy to show your support and make an immediate impact by giving online, mailing a check or sending a wire transfer.



Tip:

“Bunching” multiple years of charitable gifts into one year might allow you to itemize deductions if the total exceeds the standard deduction.

Appreciated Assets

Giving appreciated stock can be a tax-wise way to support the PTF. By giving appreciated securities that have been held for more than a year, you can avoid capital gains tax and receive a charitable income-tax deduction for the full fair market value.



Tip:

Vested RSOs held over one year or stock received upon NSO exercise held over one year also offer giving options!

Qualified Charitable Distributions from an IRA

Making a qualified charitable distribution (QCD) is a win-win for you and WMU. A QCD is a direct gift from an IRA to an eligible charity like the PTF. If you’re 70½ or older, you can direct up to \$100,000 per year tax free from your IRAs to operating charities through QCDs—regardless of whether you itemize deductions or claim the standard deduction. When you are 73, doing so will count toward your RMD.

Broncos By the Numbers 2023

Salary Average.....	\$78,077
Sign On Average.....	\$6,350
Relocation Average.....	\$6,000
Bonus Average.....	\$4,425

Graduates of the Department of Chemical and Paper Engineering at WMU are more than just marketable—100% of them are hired after they turn the tassel!