

A photograph of the Washington and Lee University building, a large red brick structure with white columns and a central dome, set against a sunset sky. The building is surrounded by green lawns and trees.

W&L

Leading Lives  
of Consequence

The Campaign for  
Washington and Lee

*Your Legacy, Your Story*

**New Horizons**

**2026-2027**

# Your Legacy, Your Story

Plan for your future with Washington and Lee University

2026 – 2027

## New Horizons

*Supporting Washington and Lee University with a planned gift is an investment in the future, providing a world-class education to the next generation of leaders. Recent tax updates and emerging trends in planned giving are expanding avenues for philanthropy, making it easier than ever to strengthen your enduring legacy at W&L.*

### ROOTED IN HISTORY, FOCUSED ON THE FUTURE

Since 1749, generous and creative gifts have supported Washington and Lee students as they develop shared values of honor, integrity and service to the university and their communities.

A deep commitment to future generations fuels philanthropy, and planned giving is a forward-looking option to support W&L's consequential leaders.

### NAVIGATING THE 2026 PHILANTHROPIC LANDSCAPE

In response to recent tax updates and the new charitable deduction floor, donors are focusing more on strategic philanthropy, prioritizing giving through appreciated assets and multi-year or bundled commitments to maximize both tax benefits and the impact of their contributions.

### EMERGING TRENDS

As the financial and tax landscapes continue to evolve, W&L alumni and friends are increasingly turning to strategic charitable giving vehicles that allow them to align personal financial planning with their passion for the university.

**Donor-Advised Funds (DAFs)** have become a favorite tool for flexible, lifetime giving. However, donors are realizing that without a succession plan, assets remaining in their DAF are left to default

distributions dictated by the DAF sponsor's policies. By naming W&L as a full or partial successor beneficiary of your DAF, you ensure that your philanthropic priorities are honored, allowing you to support the university's mission for years to come.

For those seeking reliable income, **Charitable Gift Annuities (CGAs)** are experiencing a resurgence. Thanks to recent upward adjustments by the American Council on Gift Annuities, payout rates are at some of their highest levels in a decade. A CGA allows you to make a meaningful gift to W&L using cash or appreciated securities, receive a substantial income tax deduction and lock in attractive, fixed lifetime payments. It is a financial win-win that provides peace of mind today while fueling the university's future.

Another significant trend is **unrestricted giving**. These funds provide financial agility, allowing W&L to direct resources where they are needed most.

***We invite you to reach out to our Office of Gift Planning to discuss how to optimize your giving. Together, we can ensure that your legacy is one of resilience, impact and hope.***

# 50 Years of Leadership

## Reaching for the Summit

Hanrahan Planned Gift Establishes Outdoor Leadership Program



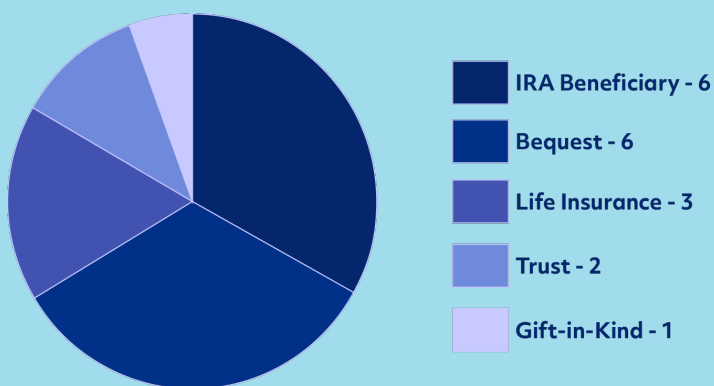
“For my 50th reunion gift, I wanted to do something that had a direct impact on students. So, working with Jacqueline Painter, the director of gift planning, and James Dick, the director of outdoor education and recreation, we crafted a four-year student outdoor leadership program. My hope is that exposing students to the outdoors will open horizons for them, and that they will get some real, practical skills they can take with them and use all their lives.”

Phil Hanrahan '76, '86L  
“Why I Give”

## Generating Success

Class of 1976 Reunion Impact

### Planned Giving Vehicles: Class of 1976



18 planned gifts from 17 classmates, representing 5 gift types. 10 of these planned gifts are unrestricted.

#### Spotlight: Giving Through Retirement Accounts

- 21 members of the Class of 1976 made QCDs from retirement accounts. Making a Qualified Charitable Distribution from your retirement account is a great way to support W&L and reduce taxable income!
- 12 of them are using QCDs to fulfill pledges or make outright gifts to W&L. Contact us or visit [plannedgiving.wlu.edu](https://plannedgiving.wlu.edu) to learn more.

# Keeping Your Future in Mind

*Planning for the future means considering how you want your assets distributed after you pass. There may be friends, relatives and charities such as Washington and Lee you want to support. Estate planning ensures that your assets are distributed according to your wishes.*



**Meet Jacqueline Painter,  
Director of Gift Planning**

*Jacqueline brings expertise in financial planning, banking and charitable strategies to help alumni and friends make informed decisions about their wealth and legacies. Jacqueline holds an M.S. in Financial Planning and is a Chartered Financial Consultant, Accredited Estate Planner and Chartered Advisor in Philanthropy.*

Charitable planning is wise financial planning. We are here to assist. If you have questions, please contact our Office of Gift Planning at 540-458-8429, or by sending an email to [jpainter@wlu.edu](mailto:jpainter@wlu.edu).

## **What happens to my assets without a will or trust?**

Without an estate plan, state law may determine how your assets are distributed — potentially in ways that differ from your intentions. Thoughtful planning can provide greater control, simplify administration and help ensure the people and causes you value are part of your legacy.

## **What are the most effective ways to transfer wealth?**

A well-designed estate plan may combine a will or living trust with beneficiary and payable-on-death designations. These tools can provide efficient transfer of retirement accounts, life insurance, securities and other assets while helping you align your financial objectives with your charitable priorities.

## **How can I include Washington and Lee in my plans?**

You can make a lasting impact by:

- Naming W&L in your will or trust through a percentage, specific amount or particular asset.
- Designating W&L as a beneficiary of a retirement account, life insurance policy, donor-advised fund or other eligible account.

Including W&L in your estate plans can help solidify your legacy and support the people, programs and priorities that are meaningful to you. Our Office of Gift Planning can provide sample language and collaborate with you and your professional advisors to help structure your gift according to your goals.

## ***Your legacy is worth planning.***

Explore our [Free Estate Planning Guide](#) for more information and insights that will help you begin estate planning conversations with your family and advisors.

Click the link above to access the guide and discover how thoughtful planning can turn your financial assets into a lasting legacy at Washington and Lee.

**Plan Your Future  
with W&L. Join the  
Doremus Society.**

Click **HERE** to inform us of your plans.

