

AL AND KATHY WOODWARD: A Planned Giving Case Study

ABOUT PLANNED GIVING

Planned giving is a general term used to describe deferred donations made through securities, business interests, life insurance, personal property, real estate, retirement plans, and other methods.

Planned giving is a part of a donor's overall financial or estate planning and is often associated with tax benefits. Making a planned gift is a way to maximize a future donation to a cause you care about as you're taking care of your family and loved ones.

PROUD MEMBERS OF THE LIFEWORKS LEGACY CLUB

When Al Woodward first got involved with Lifeworks, it was mostly by accident. In the late 1970s, he agreed to join the Board of Directors and remained a member until 1986, later rejoining the board in the mid-2000s.

But even while he wasn't a member of the Board, Al and his wife Kathy regularly made financial contributions to Lifeworks. In fact, they've made a donation every year since 1978!

"It was always an organization that I felt was doing good work, so it was an easy choice," Al said. "Kathy and I adhere to the view that we've been blessed. And as a result, you have a duty to give back."

Since Al and Kathy first got married more than 50 years ago, they have made charitable giving a central focus of their lives, and many organizations have benefited from their generosity.

"We probably had about five organizations that we were involved in that we felt deserved financial support," Kathy said.

In recent years, Al and Kathy have considered additional ways to give to organizations that matter to them.

"We made a decision that we wanted a portion of our estate to go to charity," Al said. "We love Lifeworks. We love what they do. I think we feel we have a moral commitment just like we do to our church and to other organizations that we support because we feel strongly about what they're doing."

Thanks to the support of Al and Kathy and other generous members of the Lifeworks Legacy Club, Lifeworks will be able to provide high quality services to 2,500 individuals with disabilities and their families for years to come!

CONTACT US

To learn more about planned giving or joining the Lifeworks Legacy Club, please contact Suzanne Shute at sshute@lifeworks.org or 651-365-3743.

2965 Lone Oak Drive, Suite 160, Eagan, MN 55121 | p: 651-454-2732 f: 651-454-3174 | lifeworks.org

This information can be made available in an alternate format upon request. Our TTY phone number is 651-365-3736.

Lifeworks is an Equal Opportunity Employer

Lifeworks

A nonprofit serving
people with disabilities



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**AL WOODWARD,
LIFEWORKS LEGACY
CLUB MEMBER**