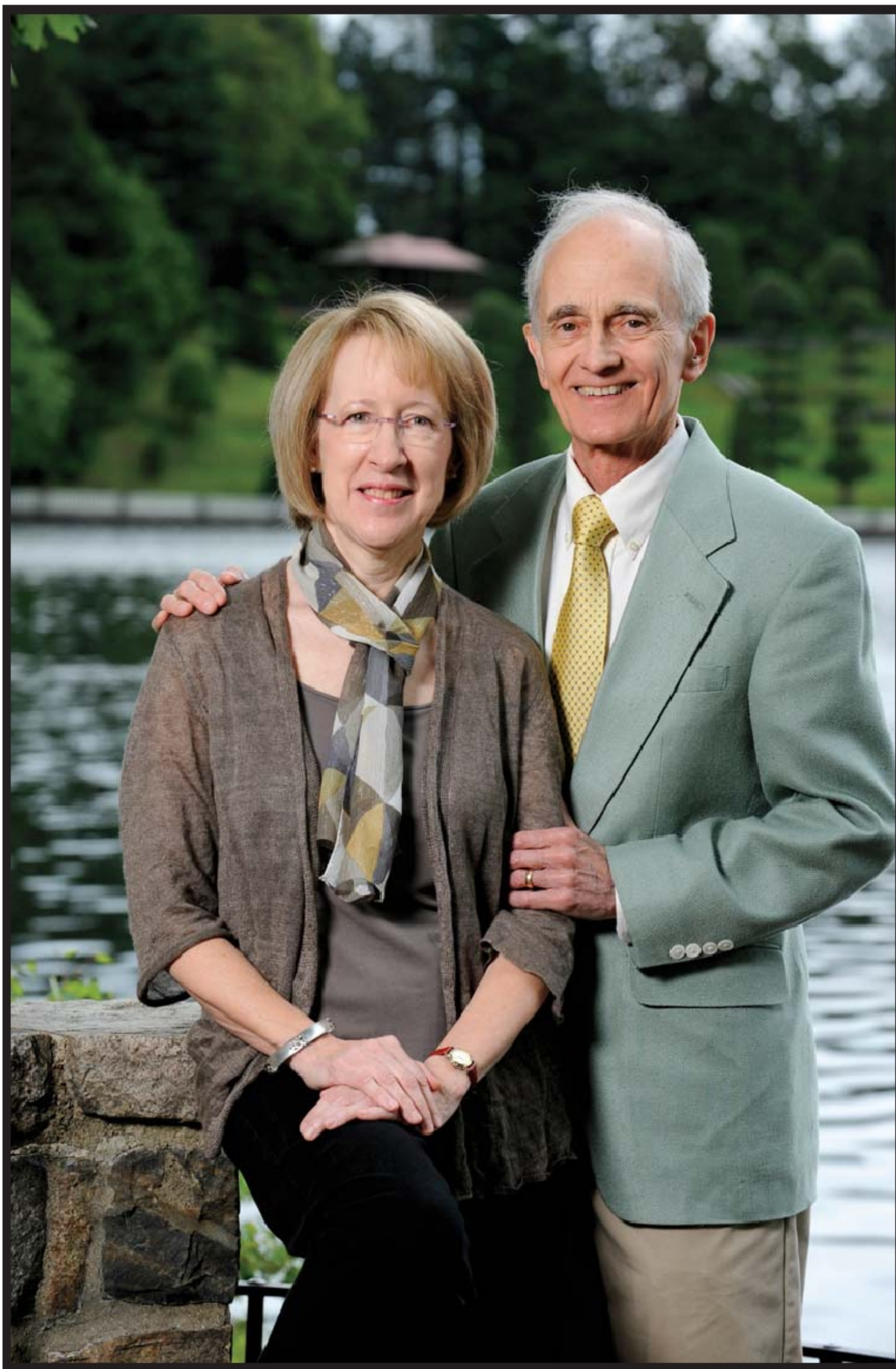


In addition to having been a math professor at Wellesley, I occasionally worked with the Planned Giving Office. Having learned of many ways over the years to make a gift to the College while providing income to a donor or beneficiary, it occurred to me that I could make Wellesley a beneficiary of a portion of my retirement funds, with the understanding that these funds would be used to provide a Charitable Gift Annuity for my wife, should she survive me. This turned out to be a simple plan to put in place and will guarantee Karen a life income, with Wellesley receiving the remainder value at her death. Though this was an unusual plan, help from the Planned Giving Office made this seem easy. All I had to do was adjust the beneficiary form for my retirement account, and they handled the rest.

Howard Wilcox



Karen and Howard Wilcox, of South Natick, Mass., are now both retired from Wellesley College: Howard, after 37 years as a mathematics professor, and Karen, after 13 years as associate director of financial aid. The couple met while singing with the Boston Symphony's Tanglewood Festival Chorus. They now enjoy travel, tennis, and singing with various choral groups.



For a financial proposal tailored to your circumstances, please contact Patricia Galindo, Director, Office of Planned Giving, 800.253.8916.