Stephen Wotman, DDS, could be called a dental pioneer: Long before others considered the positive role that dentistry and dental education could play in the community, he championed public health initiatives as a faculty member and former dean of the School of Dental Medicine at Case Western Reserve University. Wotman was instrumental in creating the university’s Master of Public Health degree program and was an advocate for closing disparities in oral care practices among societal groups. He was also founder and principal investigator of the Community Research Oral Wellness Network, which studies preventive practices in dental care.

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Retirement assets will keep public health initiatives working

Giving Retirement Assets

How does it work?

Retirement plans—such as deferred-compensation, profit-sharing, IRA, 401(k), 403(b) and 403(b) plans—permit you to designate one or more beneficiaries to receive all or a portion of the assets in the plan upon your death.

You can designate Case Western Reserve University as a beneficiary for all or part of your retirement plan assets, and, as with other will commitments, these gifts can be structured to ensure that both your family and the university benefit from the gift.

Your retirement assets will not be subject to estate tax or income tax upon receipt by the university as they would if they went to your heirs, allowing you the option of directing less-taxed assets to your loved ones while securing a lasting legacy at the university.

To learn more about giving a gift of retirement assets to Case Western Reserve, please contact Susan St. Onge, John Shelley and the other estate-planning professionals at 877.477.1143 or giftplan@cwru.edu, or visit cwru.edu/giving/planned. Financial Spotlight

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