

# Financial Spotlight

## Retirement assets will keep public health initiatives working

**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.

“Steve’s vision, energy and commitment are largely responsible for the strong public-health orientation that is emblematic of our school today,” says Jerold S. Goldberg, DDS (DEN ’70) dean of the School of Dental Medicine.

Before his passing in October, Wotman committed some of his retirement assets to the School of Dental Medicine, ensuring that what he started at the school would last long into the future. His support will establish the Wotman Professorship for Public Health.

“This gift is one more addition to the gifts that Steve gave the school for 24 years. We benefited from his intellect, knowledge, experience and wisdom for a long time,” Goldberg says. “The ripples of his generosity will go beyond the walls of this university. This gift will make a difference in the lives of individuals, the school, the profession and society.”



**Shortly before his death, Stephen Wotman, DDS (front, right) celebrated his commitment to the dental school with his wife, Sara Rouse Wotman, PhD, Dean Jerold S. Goldberg, DDS, and President Barbara R. Snyder.**

## Giving Retirement Assets

### How does it work?

Retirement plans—such as deferred-compensation, profit-sharing, IRA, 401(k), 457 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](mailto:giftplan@cwru.edu), or visit [cwru.edu/giving/planned](http://cwru.edu/giving/planned).*



## About Turning Point

**Turning Point: Progress and Partnerships at Case Western Reserve University** celebrates the campus sculpture by world-renowned architect Philip Johnson. It serves as a metaphor for the power of education to change individual lives and the impact of philanthropy on our institution’s history.

**Turning Point** is published by the Office of University Marketing and Communications  
Case Western Reserve University  
10900 Euclid Avenue  
Cleveland, OH 44106-7017  
Phone: 216.368.4440

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