

## LEGACY CIRCLE MEMBERS: FRANK AND JUDY WILHELME



Frank Wilhelme has a suggestion for people struggling to balance what may at first appear to be conflicting goals: Leave a financial legacy for their children and also for non-profit organizations they have supported for many years.

“Let’s say a couple has three children and they think of their charitable interests as a fourth child,” he says. “Instead of splitting what they will eventually leave behind after their deaths three ways, they could choose to split it four ways. This addresses both of their goals in an equitable way.”

For Frank and his wife, Judy, making an estate provision now ensures that their support of important charitable causes will continue in perpetuity.

“People always think they’ll get to it tomorrow,” she says of their estate planning. “And too often they just don’t get to it.”

When that happens, a desire to continue supporting non-profit organizations meaningful to them during their lives may not be fulfilled.

The Ann Arbor and Torch Lake couple practice what they preach: Frank and Judy Wilhelme are the newest members of the Legacy Circle of the Historical Society of Michigan. That means they have remembered the Society in their estate plan and notified the Society of their intent.

“We’ve been through an evolving process to put together a list of the organizations that we’ve cared about over the years,” says Frank Wilhelme, who was the executive director of the Historical Society of Michigan from 1971 to 1980, who then raised money to support the Ross School of Business at the University of Michigan for nearly 30 years before retiring in 2009. He currently serves as a volunteer member of the Historical Society of Michigan’s Board of Trustees.

“My time as executive director of the Historical Society of Michigan was a pivotal time for me, so it seemed appropriate to add the HSM to our list of bequest organizations,” he said. “The Society has a key role to play. We want the HSM to be here another 100 years on top of its nearly 200 years of existence already.”

Why is that so important to the Wilhelmes?

“Understanding your historical roots is a bedrock part of one’s identity. We are concerned about people’s lack of understanding of their own historical roots – where they’re from and how that place evolved and why it is the way it is today.”

The Wilhelms have decided they would like their gift to become part of the Society’s growing endowment fund, which will support its activities permanently. Their gift cannot be spent, but the earnings it generates will be available to support the Society in the future.

“We’re excited by what’s happened in the last 15 to 20 years” with expansion and increased stability of the Society’s programs and services, Frank says, and the couple wants to help keep that momentum going. “The endowment is kind of a ballast in your ship as you chart the course for the future of a non-profit organization.”

This approach allowed them to not be too specific with their bequest because “who knows what will change over the years?” Frank says.

One thing we do know is that their generosity today will provide those who lead the Historical Society of Michigan tomorrow and for years to come with the resources to navigate those changes in a way that continues its mission of history education.