

# Pages of generosity: Wilson's literary legacy

## Why this story matters for advisors

Clients often inherit or manage niche collections like books, art, and memorabilia that are valuable but difficult to liquidate or donate. This story shows how a donor-advised fund can simplify that process, honor a family legacy, and create a meaningful planning moment that strengthens advisor relationships during an emotionally complex time.



## Situation

Lauren, recently widowed in Madison, Wisconsin, was navigating life without her husband, Wilson. He had spent decades building a remarkable collection of 20th-century literature — thousands of curated volumes, including a first-edition Hemingway. The couple had a long history of supporting local nonprofits, and Lauren wanted that spirit to continue. But she now faced a highly personal question: what to do with Wilson's \$1.7 million rare-book collection?

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### Solution

With guidance from her family and charitable partners, Lauren contributed the entire collection to a donor-advised fund. Ren supported the review, valuation, and sale of the books at auction — converting a specialized, illiquid collection into flexible philanthropic capital the family could steward over time. This approach reduced complexity, protected Lauren from logistical overwhelm, and created a structured way to continue giving.



### Impact

For the donor and family

- The collection sold for \$1.7 million, with proceeds directed to their DAF.
- Lauren honored Wilson's legacy in a meaningful, lasting way.
- The DAF now supports ongoing charitable grants aligned with their shared values.

For the advisor relationship

- Provided a clear solution during a sensitive estate transition.
- Demonstrated expertise with complex, emotionally charged assets.
- Opened doors to long-term, multi-generational philanthropic planning.



### Advisor takeaway

Collections are often overlooked charitable assets. When a client inherits or holds a specialized asset — rare books, art, antiques, or memorabilia — a DAF can be the simplest path for honoring intent, reducing administrative burden, and creating substantial charitable impact. Advisors who know this play can immediately differentiate themselves during estate and legacy conversations.

## Have clients with appreciated assets or complex holdings they want to use for good?

Have a client with a unique or complex asset?

Email [AskanExpert@reninc.com](mailto:AskanExpert@reninc.com) for a quick consult on next steps.

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