Gratitude today for a brighter tomorrow

From empowering top-tier students to funding cutting-edge innovations in virtually every field and industry, each and every bequest and planned gift made to McGill has an important impact on the lives of our students, our University, and on the communities we serve.

Bequests and other planned gifts may be focused on the future, but the University acknowledges those individuals who have informed us of these thoughtful and meaningful gifts today through membership in the McGill 1821 Society and Macdonald Legacy Society. As well, for those gifts that have been realized over time, their impact—and the gratitude of the many talented students whose lives are being transformed thanks to planned gifts—can be felt right now.

In this issue of the Estate Planning Newsletter, we pay tribute to those generous and distinguished individuals whose gifts will ensure a bright future for our University and our world, and gratefully acknowledge those who have passed away but whose gifts are helping McGill’s students today.

We Thank You!

We are proud to feature the voices and stories of some of the talented young people whose lives and futures have been transformed thanks to such legacy gifts.

“Mr. Sievers has not only supported me this year by keeping a roof over my head and food on the table, but has given a gift that I hope will benefit us all in the scientific collaboration to cure cognitive disease.”

Jennifer Goldman, BA’06
Neurology and Neurosurgery PhD candidate
Ann and Richard Sievers Award recipient

“The real reason that I have been able to remain a runner both literally and metaphorically throughout my time here at McGill is due to the financial support that the Greville Smith Scholarship has provided me.”

Sarah McCuaig, BSc’13
Greville Smith Entrance Scholarship recipient
McGill track and field and cross-country star

“Having this scholarship makes all the difference in the world.”

Marc-Olivier Vachon
Mining Engineering student
Ross Ritchie Family Scholarship recipient

Read on to learn how philanthropy is transforming the lives of these students.
Dear McGill Graduates and Friends,

It was with great enthusiasm and admiration that I watched as Suzanne Fortier, BSc’72, PhD’76, was installed last fall, as McGill’s 17th Principal and 13th Vice-Chancellor. Professor Fortier comes to the University with an extraordinary academic pedigree and a remarkable vision to move McGill forward with confidence in the rapidly shifting landscape of the 21st century.

Crucial to Professor Fortier’s ambitious plans for McGill is the extraordinary generosity of our alumni, friends, faculty and staff. Your steady support allows our University to have a profound impact on education, research, innovation and outreach not only here in Quebec, but across Canada and around the world. This issue of the Estate Planning Newsletter profiles several of our incredible benefactors, and reflects on the extraordinary impact such support has on our students. I trust you will take as much joy from their heartwarming stories as I do.

On behalf of the entire McGill community, thank you for your unwavering support.

Susan Reid
Director of Bequests and Planned Gifts

Marc Sievers, BSc(Hon)’69, was just four years old when he and his parents immigrated to Canada from Hamburg, Germany in 1952. The family soon settled in Montreal, and with the help of their newly made Canadian friends, gradually found a footing in their adopted homeland.

Years later, thanks in large part to his parents’ steady encouragement, Sievers became the first person in his family to attend university, earning a Bachelor of Science from McGill and a Master of Science from the Massachusetts Institute of Technology.

Sadly, his mother Ann passed away in 2000, while his father Richard died three years later following a lengthy battle with Parkinson’s disease. To celebrate their memory and support innovative brain research, Sievers made a generous gift to create the Ann and Richard Sievers Award in Neuroscience. The annual award, which will be included in Sievers’ estate plans, recognizes and supports exceptional PhD students in the Integrated Program in Neuroscience at The Montreal Neurological Institute and Hospital of McGill University – The Neuro.

“This is my way of honouring my parents and thanking them for helping me get through McGill,” Sievers says. “I also wanted the award to recognize excellence in research and provide students with the financial flexibility to complete their work.”

This year’s recipient, PhD candidate Jennifer Goldman, is doing just that. She is conducting research that will enhance the understanding of the molecular mechanisms instructing neural development during mitosis, cell migration, axon guidance, synaptogenesis, circuit plasticity, and homeostasis – all important processes that contribute to the proper function of the brain – and is using this knowledge to engineer better strategies to prevent neural degeneration.

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Marc Sievers, BSc’69

This year’s recipient, PhD candidate Jennifer Goldman, is doing just that. She is conducting research that will enhance the understanding of the molecular mechanisms instructing neural development during mitosis, cell migration, axon guidance, synaptogenesis, circuit plasticity, and homeostasis – all important processes that contribute to the proper function of the brain – and is using this knowledge to engineer better strategies to prevent neural degeneration.

“Funding science is without a doubt one of the most important and altruistic acts that a philanthropist can undertake,” says Goldman. “Mr. Sievers has not only supported me this year by keeping a roof over my head and food on the table, but has given a gift that I hope will benefit us all in the scientific collaboration to cure cognitive disease.”

For his part, Sievers is hopeful that his gift will lead to important new discoveries.

“While much of our attention is focused on diseases like dementia and Parkinson’s, neuroscience is a very broad and vibrant field of study full of unanswered questions,” he says. “There is tremendous potential to make a difference and have an impact on human life.”
Frances O’Brien, BA’51, wore many hats, but “McGill grad” was her proudest. From the equestrian ring to the boardroom, O’Brien has had an impact in a range of environments. But it’s through her generous giving to McGill that O’Brien is having the greatest impact of all.

O’Brien’s student experience at McGill came as the result of a long-standing family tradition. She, her three siblings, her father and grandfather all hold McGill degrees, and her grandmother, Eliza Cross, was among the University’s first female graduates, completing a Bachelor of Arts way back in 1888.

“I am forever grateful for my time at McGill,” O’Brien says. “I had a wonderful education and fabulous professors who really helped me to challenge myself.”

“My parents made a lot of sacrifices so I could have a good education and I’d like to do my part to help others. I can’t give a lot, but I am hopeful that what I give will make a difference.”

Frances O’Brien, BA’51

In addition to the obvious academic rewards she reaped, O’Brien also made treasured memories while attending Redmen football games with her father, George S. Currie, and developed several lifelong friendships through her participation with the Delta Gamma Fraternity. “Frances was a darn good student,” remembers her brother, George N.M. Currie, BEng’51. “She was very bright, conscientious and had an immense curiosity about life.”

After graduating in 1951 – during an era when most women were expected to be homemakers – O’Brien embarked on an administrative career, working with Stikeman Elliott LLP in Montreal, and internationally with leading companies such as British Petroleum and the J. Walter Thompson advertising agency. She also developed a passion for equestrianism and owned numerous show horses over the years, including partial proprietorships of world champion Big Ben and two participants in the Summer Olympic Games.

In 1962, she married J. Barry O’Brien, president of the Ottawa Roughriders football team, and the couple had a daughter two years later. Erin Lyons—now a mother herself—speaks admiringly of her mother, explaining that, despite her many obligations, O’Brien always found time to give back. “Volunteering has always been important to my Mum,” says Lyons. “Over the years she has contributed her time and creativity to many organizations, with a keen interest in the medical and literary fields.”

O’Brien credits McGill with having a profound impact on her life, and has shown her deep appreciation by giving back to the University loyally for over 50 years. She has also made plans for a bequest to support McGill’s Greatest Needs – an unrestricted gift that will allow the University to designate the funds where and when they will have the most impact on students.

“My parents made a lot of sacrifices so I could have a good education and I’d like to do my part to help others,” she says. “I can’t give a lot, but I am hopeful that what I give will make a difference.”

We’d like to hear from you

Have you been inspired by these stories of alumni and friends who have made a bequest or other planned gift to McGill? If so, please do not hesitate to contact us with any questions you may have about planned giving opportunities. If you return the enclosed Reply Card, you will receive our Personal Planner booklet, which is a very useful tool when organizing your estate affairs.

For those who have or are considering a bequest, we also invite you to complete the letter “My Gift for Future Generations” and return it to our office (found on our webpage http://aoc.mcgill.ca/give/ways-give/planned-gifts/bequests). This document will help identify where your gift is to be directed.
“It is important to lead by example. I could never ask somebody to do something that I am not ready to do myself. And at the end of the day, there is no better cause to support than students.”

Marvin Corber

For more than 40 years, Marvin Corber has put his time and talents to good use on McGill’s behalf. A master of the fine art of fundraising, he used his role as Chairman of the Bequests and Planned Gifts Campaign Committee to help secure over $68 million in realized planned gifts and another $106 million in planned gift commitments over the course of Campaign McGill. He’s also a Governor Emeritus and former Vice-Chair of the University’s Board of Governors.

“For fundraising is my second career, but most people would probably say it is my first,” says Corber, a former managing partner and current consultant with the Richter accounting firm. “I approach fundraising the same way that I approach putting on the green when I play golf: gently, carefully and respectfully.”

But Corber doesn’t just raise money; he practices what he preaches. Over the years, he has generously supported just about every facet of McGill, from Arts and Libraries to Music and Medicine. In 2008, he and his wife, Harriet, DipEd’53, made a generous gift to create the Harriet and Marvin Corber Family Fund for Student Support, which provides important professional development opportunities for students in the Desautels Faculty of Management. The gift is coupled with a charitable bequest intention to ensure the fund will continue in perpetuity.

“It is important to lead by example. I could never ask somebody to do something that I am not ready to do myself. And at the end of the day, there is no better cause to support than students,” he says.

Corber’s good work has earned him a number of honours over the years, including the McGill Alumni Association’s Award of Merit in 2011, appointment to the Order of Canada in 2002 and the prestigious Samuel Bronfman Medal in 1992.

Interestingly, Corber himself isn’t technically a McGill graduate. Though he studied commerce at the University, a summer internship at Richter (then called Richter, Usher & Vineberg) turned into a full-time career. However, since then, his son, Michael, BCom’85, DPA’86, and daughter, Deborah, BMus’81, have both earned McGill degrees, while his two granddaughters are currently honours students in the Faculty of Science.

“I don’t have the parchment, but I consider myself a McGill graduate in every other way,” he says. And McGill is lucky to have him.

From intention to impact: the process of realizing a bequest

Making a bequest to McGill is a meaningful way to have a lasting impression on future generations of students, professors and researchers. But what happens when a donor passes away and their gift is actually realized? We spoke to Estate Administration Officer Cynthia Gordon, who provided answers to two of your most common questions about what happens when an estate is realized.

“I’ve made a bequest to McGill: what happens when I pass away?”

The process of realizing a bequest can be an arduous and emotional time for all those involved. Therefore, McGill’s Bequests and Planned Gifts Office works to make the process as simple and thoughtful as possible. First, McGill reviews the Will or trust documents to ensure that McGill can accept the bequest and fulfill the wishes of the donor. Once this is completed, the University communicates with the liquidator, executor or estate trustee to acknowledge receipt of all relevant documents; processes the bequest payment; mails a receipt; and makes sure everything is completed and recorded in an appropriate manner. Throughout, respect and personal service are McGill’s guiding principles: “No two Wills are the same, and just a single word can often change a Will’s entire meaning,” Cynthia Gordon emphasizes. “Because of this, we have to treat each estate distinctly, with the utmost respect.”

“How can I be sure my bequest will support the areas I’ve designated?”

As with all donations it receives, McGill puts the highest possible priority on making sure that bequests are used in the manner in which the donor intended. Once a payment from an estate or trust has been received, the Bequests and Planned Gifts Office works closely with colleagues across the University as well as the liquidator (or executor or estate trustee), to ensure that the wishes of the donor are respected and carried out. “The job of a liquidator is to ensure that the assets of an estate are realized in a way to maximize the amounts available to beneficiaries and to ensure that the wishes of the deceased are carried out effectively,” explains Philip Greenberg, BCom’58, of Philmar Management Ltd.,
Teena Fazio, BEng’92 speaks fondly of her experience as a McGill student and the foundation that it laid for her and she hopes to extend that same opportunity to future deserving students.

It is one of the reasons why she’s made provisions in her Will to create a new scholarship for female students in the University’s Faculty of Engineering. “McGill fostered four great developmental years which have had a formative impact on my life,” she says. “When I prepared my Will, I felt this to be a worthwhile cause to support.”

During her own time as a McGill student, Fazio thrived in the classroom and in campus extracurricular activities, including the Civil Engineering Undergraduate Society and the Canadian Society for Civil Engineering.

She has since enjoyed an enviable engineering career. Recruited on campus by the Ministry of Transportation of Ontario, she spent the first six years of her career managing road and bridge construction and design projects, before moving to France to complete an MBA at the prestigious INSEAD business school. After returning to Montreal, she worked for an international management consulting firm and subsequently joined Rio Tinto Alcan.

Despite her success, Fazio has never forgotten about her McGill roots and has given back to her alma mater in important ways. She has volunteered with the McGill MBA Women’s Mentoring Program and participated in several initiatives for the Promoting Opportunities for Women in Engineering (POWE) student group, including acting as their keynote speaker at their 2013 conference for future women engineers.

Now, more than 20 years after her graduation, Fazio has accepted a position as the new Director of Administration for the Faculty of Engineering. She couldn’t be more excited to return to her old stomping grounds.

“I have come full circle,” she says. “It is wonderful to be back within these walls and contributing to this institution that has given me so much over the years. I feel right at home.”

Suggested Bequest Language

The following clauses can be tailored to suit your interests. As well, the Bequests and Planned Gifts Office suggests that you consult the appropriate tax and legal professionals before making such arrangements.

Suggestion A:

“I give and bequeath the sum of $_______ (or ____% of the residue of my estate) to McGill University at Montreal, Quebec, Canada to establish an endowment fund, the income of which is to be used by McGill University or by the Faculty/School of ________, for a ________ (insert designation; for example, fellowship, scholarship, bursary, loan, other award, or McGill University Libraries) in my name (or in memory of ________________),”

Suggestion B:

“I give and bequeath the sum of $_______ (or ____% of the residue of my estate) to McGill University at Montreal, Quebec, Canada for the general purposes of the University and its greatest needs OR to be used in the Faculty/School of ________ for its general purposes and greatest needs OR to be used in the Faculty/School of ________ designated to ________, (identify program or project).”

“Revised Purpose” Clause

Because McGill today is a far different place than it was in 1821 and will continue to evolve in the coming years, including the following text in a bequest ensures that your wishes will be respected if circumstances relating to the use of the gift change.

“If at any time, McGill University judges the designated use of this bequest no longer practical or appropriate, then the University shall use the annual income of the endowment or direct-spent fund to the best advantage of the University, for other purposes consonant with the spirit and intent of my gift.”
Reaching Out to Our Communities

New Members of the McGill 1821 Society and Macdonald Legacy Society

Upon his death in 1813, James McGill bequeathed his 46-acre estate and 10,000 pounds to establish a college. It is from that extraordinary gesture and on the footprint of his estate that McGill grew into the University it is today.

The McGill 1821 Society and Macdonald Legacy Society are pleased to build on this remarkable legacy by honouring donors who have chosen to remember the University in their estate plans or with another form of planned gift.

We are pleased to welcome to these two societies the following new members, who joined during our last fund year, which ran from May 1, 2012 to April 30, 2013:

E. Maureen Anderson
George Bleier
D. Norris Brown
Jeremy E. Clark
Joan (Allen) Cleather
Edward (Ted) G. Cleather
Margaret Davidson
A., Jean de Grandpré
Rosamond de Maret
Elvio D. Desimone
Jean M. de Temple
Tienna Fazio
Roxalie Goldwater, Genovese
Victoria Joel Gold
Christopher C. Hart
Bryan C. G. Haynes
Daniel Holland
Joan K. Jackson
Tommy J. Jellinek
Linda S. Kaplan
Leonard Katz
Alessandra Leopardi
Margaret (Ward) Levine
Michael P. Maxwell
Michael A. Meechens
Sandra C.G. Miller
Philip N. Neroutsos
Richard David Parker
Alfred and May Persson
Antony Ralling
Tom and Twink Rogers
Robert Rufolo
William A. Saunders
Cynthia M. Shewin
Valerie A. Sims
James D. Sullivan
Robert D. Tamila
Richard M. Tattersall
Ian N. Urquhart
Victor Virak
Douglas W. Wilson
Elizabeth (Masgrove)Wilson

Note: The above list includes members who have given McGill permission to publish their names.

Serenading the Senses

How do opera performers sing so loud? How do they carry notes that seem to last forever? And can their piercing voices really shatter glass?

McGill retirees had a unique chance to learn these trade secrets – and enjoy beautiful music – by attending this FREE Campus Community Committee event.

Honouring a Legacy of Generosity

McGill gratefully acknowledges those generous alumni and friends whose estate gifts to the University show that the future of McGill was close to their hearts. The following list represents bequests received during the last fiscal year ending April 30, 2013.

In Memoriam

Dr. Samuel Aber and Family Fund
Dr. Charles Joseph Adams
Delise Alison
Estate of Lucie Bisensang
Legs de Ljerka Putic Blume
Estate of Uriel Donald Budd
Estate of Sylvia Mary Burklinshaw
Estate of Anne V. Byers
Estate of Dr. George W. Clark
Estate of Dr. E. Catherine Cline
Betty Lou Cowper Charitable Trust
Estate of John L. Darby
Michael D’Avirro Estate
Estate of Gail de Belle
Estate of Mr. Arthur Leeuwin Dempster
Estate of Margaret O’Hanley Duffy
Dr. Thomas W.R. East
Estate of Elfriede Boettger Falk
Dr. John R. Fraser and Mrs. Clara M.
Fraser Memorial Trust
Estate of Mary Catherine Freeman
Estate of Charles Fugère
Estate of William H. (Bill) Fuller
Estate of Henry E. Golba
Estate of Ewa Gorwic
Estate of Mary Gower-Rees
John M. Hallward
Estate of Charronne Hartwell
Estate of Dr. Sue Hendler
Estate of Dr. James Harvey Bruce Hilton
Dr. Ruby G. Jackson
Patrick Jünger
Estate of Dr. Dorothy Karp
Estate of Robert E. Kirkpatrick
Estate of Dr. J.F. Williams Trust
Estate of Vivian Frances Wightman
Estate of Ross Alfred Ritchie
Estate of Bernadette, Jeanne D’Arc, Thérèse
Famille Emmanuel Prud’homme/ Bernadette, Jeanne D'Arc, Thérèse
Estate of Ross Alfred Ritchie
Estate of Christina Elizabeth Evelyn Tate
Estate of Maurice Théault
Succession Rose Durant Théault
Succession René Trudelle
Succession Rose Durant Théault
Succession René Trudelle
Estate of Beatrice and Jason Waller
Elsie May Weaver
Estate of Vivian Frances Wightman
Dr. J.F. Williams Trust
Estate of Dr. Stanley E. Willis II
Estate of Dr. James Harvey Bruce Hilton
Dr. Ruby G. Jackson
Patrick Jünger
Estate of Dr. Dorothy Karp
Estate of Robert E. Kirkpatrick
Estate of Dr. J.F. Williams Trust
Estate of Vivian Frances Wightman
Estate of Ross Alfred Ritchie
Estate of Bernadette, Jeanne D’Arc, Thérèse
Famille Emmanuel Prud’homme/ Bernadette, Jeanne D'Arc, Thérèse
Estate of Ross Alfred Ritchie
Estate of Christina Elizabeth Evelyn Tate
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Succession René Trudelle
Succession Rose Durant Théault
Succession René Trudelle
Estate of Beatrice and Jason Waller
Elsie May Weaver
Estate of Vivian Frances Wightman
Dr. J.F. Williams Trust
Estate of Dr. Stanley E. Willis II
Estate of Jean Elizabeth Yield Wright

Note: The above list includes those who have given McGill permission to publish their names.

Save Paper!

If you would like to receive future issues of this newsletter by email, please contact us at records.alumni@mcgill.ca
The Ross Ritchie Family Scholarship:
A hockey player’s generosity fulfills a student athlete’s dream

When Marc-Olivier Vachon learned he had won the inaugural Ross Ritchie Family Scholarship, the Mining Engineering student knew he had struck gold.

Born and raised in Thetford Mines, a small mining town in Quebec, Vachon hopes to follow his father and grandfather into the mining industry, and the scholarship will go a long way to helping him achieve this goal. The award also gives Vachon the flexibility to focus on his other passion: playing centre for the Redmen varsity hockey team.

“Between school and hockey, I don’t really have time for a part-time job so having this scholarship makes all the difference in the world,” says Vachon. “It gives me the chance to pay my rent, pay my bills, and most importantly, pay my tuition.”

Vachon’s success story unites past, present and future through an amazing continuum of family generosity. The scholarship he received was established and endowed through a generous bequest from the late Ross A. Ritchie, BEng’43, who passed away in 2011. His son John Ritchie, daughter Jennifer Ritchie Barrett, grandsons David Ritchie and Kellen Barrett, and granddaughter Taylor Barrett Michaud, BA’04, then chose to selflessly advance the bequest, creating the student award today rather than wait years for the funding to become available.

A loyal annual supporter for many years, Ross Ritchie never forgot the impact that McGill had on his life. As an engineering student, he received several bursaries that allowed him to pursue his studies and shine as the star goaltender for both the McGill Redmen and the Montreal Junior Royals. The University was also where Ritchie met his late wife, Joan Waterston, BA’43, and the couple remained inseparable until her death in 1991.

“My dad had a deep affection for McGill and he wanted to do something to not only honour Engineering and Athletics, but to also help the students who are following in his footsteps,” explains his son, John. “As a family, we felt it was important to ensure that these wishes were respected.”

Also crucial to the creation of the scholarship were Jay Feehely, Ross Ritchie’s lawyer, and family friend Ken Dryden, LLB’73, the legendary Montreal Canadiens goaltender.

“Ross Ritchie was proud to be a McGill grad, proud to be an engineer and proud to be a member of the Redmen hockey team,” says Dryden. “He grew up during a time when families dreamed their children could combine sports with a university education, so having been given the chance to achieve these goals mattered a lot to Ross.”

From past to present, and from one student-athlete to another, the Ritchie family’s generosity is a powerful example of how past successes can help shape future dreams.
The Recognition – Tea Time

Each year, the University hosts a special Tea with the Principal for members of the McGill 1821 Society and the Macdonald Legacy Society.

This year’s event was held on April 10, 2013 in the Main Ballroom of McGill’s Faculty Club. Former Principal and Vice-Chancellor Heather Munroe-Blum inducted the newest members of the two Societies: George Bleier, Teena Fazio, Michael Meighen, Sandra Miller, Tom and Twink Rogers, Robert Ruffolo and Robert Tamilia.

A highlight from this event was an inspirational speech from Sarah McCuaig, BSc’13, team captain for the McGill track and cross-country teams. McCuaig reflected on the many ways in which philanthropy eased her financial burden and allowed her to earn Academic All-Canadian status, make the Principal’s Student-Athlete Honour Roll and qualify for the Dean’s Honour List.

“When I am not chasing or being chased around the track, I suppose one could say I am chasing after knowledge and scientific discovery. I am easily swayed by passionate people and I have been so fortunate here at McGill to have been taught by countless professors whose passion for their subject matter is contagious.

But the real reason that I have been able to remain a runner both literally and metaphorically throughout my time here at McGill is due to the financial support that the Greville Smith Scholarship has provided me. Undergraduate research jobs are not the most lucrative, but one cannot even begin to put a monetary value on the learning experience. Instead of arriving home from a track meet and rushing off to a part-time job, I can spend my Sunday evenings cuddling premature babies in the neonatal intensive care unit at the Royal Victoria Hospital.

Myself and countless others have been the beneficiaries of not only H. Greville Smith’s hard work but of the hard work of each and every one of you in this room today and we are all indebted to you.”

Sarah McCuaig, BSc’13