THE GIFT OF A LIFETIME

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PLANNED GIVING... A LITTLE THOUGHT GOES A LONG WAY

The ripple effect of a planned gift

Drop a pebble in water and it will create a ripple that spreads across the surface. Philanthropy works much the same way; as illustrated below, each planned gift through McGill has a rippling effect, directly and indirectly empowering future generations of students, who in turn, will go on to transform thousands of lives through their own efforts.

The best part is that making preparations for a planned gift is almost as easy as tossing a pebble into water. Please remember that a little careful preparation on your part will go a long way towards making a transformative difference in the lives of our students.

Your thoughtful planned gift will have an impact on future generations of McGill students.
Top 10 Tips
When Making A Will

1. Plan early – you’re never too young to make a Will.
2. Seek the guidance and advice of qualified financial and legal advisors.
3. In consultation with your financial and legal advisors, be sure to effectively provide for an efficient disposition of your assets to all your intended beneficiaries, while maximizing tax benefits.
4. Choose an executor* wisely, since the executor will be acting on your behalf and carrying out your wishes after your death.
5. If you have minor children, carefully select a guardian/trustee.
6. Ensure the appropriate disposition of personal effects, especially those with sentimental value. In fact, you may wish to dispose of these items before death.
7. Clearly outline your funeral arrangements.
8. Inform someone (preferably the named executor) of the location of your Will and other important documents.
9. Consider McGill in your Will.
10. Review your Will regularly (every 3-5 years).

* In the province of Quebec, an “executor” is a “liquidator.” In the province of Ontario, an “executor” is an “estate trustee.”

A Dean’s Vision
Sets the Stage for Budding Musicians

Winning the Helmut Blume Memorial Scholarship has been music to Naomi Garrett’s ears. The McGill student, a violinst studying music education at the Schulich School of Music, is working towards becoming a teacher, and the award provides her with crucial funding to cover tuition, books and living costs.

“Because of this award, I can spend the academic year focusing on my studies and extracurricular activities, rather than having a part-time job,” she says. One of those activities includes teaching music on a volunteer basis at a local school, enabling her to offer a community service while gaining experience for her future profession.

(Continued on page 3)
Benefits of a Charitable Gift Annuity

A charitable gift annuity is an easy way to support McGill while generating future revenues that will ultimately support initiatives at McGill in perpetuity.

“The charitable gift annuity is really a win-win arrangement,” Frank explains. “It benefits us and it benefits McGill, so what’s not to like?”

Daphne agrees. “McGill has been such a large part of our lives, so donating was an easy decision,” she says, adding: “You have to give as much as you take in life, and McGill has given us a lot to be grateful for.”

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Helmut and Ljerka Blume

Empowering students like Garrett is what the late Ljerka Putic Blume had in mind when she established the scholarship through a generous bequest. The award honours her late husband, Helmut Blume, who served as McGill’s Dean of Music from 1963 to 1976. Mrs. Blume passed away on April 23, 2012.

Lawrence Reich, BSc’66, BCL’69, who served as curator of Mrs. Blume’s affairs, remembers her as, “A wonderful person and an excellent piano teacher.

She may have been tough on her pupils, but she was also compassionate, kind and nurturing – and they loved her for it.”

Professor Sean Ferguson, McGill’s current Dean of Music, says it is fitting for the Schulich School to have a scholarship that bears the name of one of its most important figures. “Dean Blume played a critical role in stewarding the Faculty of Music through one of its most difficult periods, initiating a period of growth and renewal that has led to the Schulich School of Music being recognized internationally as one of the world’s leading music schools,” he says. “This scholarship recognizes his legacy by continuing to build an exciting future for music at McGill.”

Making a planned gift: It’s as easy as... falling in love

Though it happened almost 70 years ago, Frank Trasler, BEng’48, Dipl. Management’58, still recalls the exact moment he met his wife, Daphne, BSc’48, MSc’54, PhD’58.

“The day was June 7, 1947,” he says confidently. “I was participating in a McGill Outdoors Club bicycle excursion near Knowlton, Quebec, and I spotted her cycling from afar.” The pair became practically inseparable for the rest of their McGill undergraduate experience, and married in October 1951.

The University that brought them together has since remained entwined with their lives. Daphne was a McGill biology professor for almost 25 years, while Frank was a member of the University’s Buildings and Grounds team for one year. He went on to pursue a career in engineering and later fulfilled his other passion as an artist. The couple even passed their passion for McGill down to their daughters, Tessa, BSc’81, MSc’87, and Jacquetta, MDCM’80, PhD’87, and granddaughter, Genevieve Genest, BSc’06, who all attended the University.

Motivated to give back, the Traslers have donated generously to McGill for over 50 years, and they recently elected to support McGill through a charitable gift annuity. This advantageous giving strategy provides the couple with steady, guaranteed, and in their case, tax-free income during their retirement, while generating future revenues that will ultimately support initiatives at McGill in perpetuity.

Frank explains. “It benefits us and it benefits McGill, so what’s not to like?”

Daphne agrees. “McGill has been such a large part of our lives, so donating was an easy decision,” she says, adding: “You have to give as much as you take in life, and McGill has given us a lot to be grateful for.”

A match made at McGill: Frank and Daphne Trasler

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Benefits of a Charitable Gift Annuity

A charitable gift annuity is an easy way to support McGill while sustaining a lifetime stream of fixed payments for you and/or your co-annuitant. This gifting option is best suited to donors 70 years and older, with a minimum contribution of $10,000.

The following chart is an example of an irrevocable contributed asset of $100,000 into an annuity. The rate of your gift annuity will depend on factors such as age, gender and interest rates.

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Dear McGill Graduates and Friends,

McGill has always offered students a world-class academic experience, but the University is now committed to doing even more. As part of Principal and Vice-Chancellor Suzanne Fortier’s vision for the future, McGill is working hard to ensure that every single student has the opportunity to participate in at least one out-of-the-classroom learning opportunity during their time here, such as an internship, academic exchange program, industry co-op or research project.

It’s an ambitious goal, and in this issue of the Estate Planning Newsletter, we showcase several graduates who have already made commitments to support McGill and its students, and we explore the various ways that you can make your own long-lasting pledge. I hope you find that the personal stories in this newsletter provide inspiration and bring to life the amazing impact that a planned gift can have on the lives of students for generations to come.

There is no time like the present to think about the future, and it has truly never been easier to make arrangements to include McGill in your estate plans. Whether through a bequest, charitable gift annuity, charitable remainder trust or donations of retirement plan assets and life insurance, there is no shortage of convenient planned giving methods for you to employ to positively influence McGill and the world.

All it takes is a little careful planning for you to have an impact – and to potentially secure significant tax benefits for yourself and your family. And by informing McGill of your bequest intentions, you enable the University to both plan ahead and to acknowledge you during your lifetime.

Please do not hesitate to contact the Bequests and Planned Gifts Office for assistance in achieving your philanthropic vision. Thank you for your invaluable support and dedication to McGill.

Susan Reid
Director of Bequests and Planned Gifts

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.

By returning the following 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, www.mcgill.ca/planned-giving). This document will help identify where your gift is to be directed.

In order to best assist you with your planning, please fill in this card and mail it in the enclosed self-addressed envelope to the address below. The staff of McGill’s Bequests and Planned Gifts Office will be pleased to contact you in response. All inquiries are kept strictly confidential.

□ I am considering a provision in my Will for McGill University. □ I have already made a provision in my Will for McGill University. □ Please send me information on bequests and other planned gifts. □ I wish to meet/speak with a Planned Gifts representative.

Name: ____________________________ Birth Date (Optional): ______________

Address: _____________________________________________________________________________

City: ____________________________ Province/State: ______________ Postal/ZIP Code: ______________

Faculty and Year of Graduation: ____________________________________________________________________________ Telephone: ____________________________

Fax: ____________________________ Email: ____________________________

Please return this card to:
Bequests and Planned Gifts Office | McGill University | 1430 Peel Street | Montreal, QC H3A 3T3
New Members of the McGill 1821 Society and Macdonald Legacy Society

The McGill 1821 Society and Macdonald Legacy Society recognize and honour all alumni and friends who have chosen to remember the University in their estate plans or through another type of planned gift. When joining one of these two societies, donors become part of an exclusive and treasured group of individuals who have helped to provide for generations of students and researchers to come.

The University is pleased to welcome to the McGill 1821 Society and Macdonald Legacy Society the following new members, who joined during our last fund year, which ran from May 1, 2013 to April 30, 2014:

Kevin H. Aucoin
E. Jane Aucoin
Richard Baxter
Jonathan Bishinsky
Joan Bradley and the late Keith T. Bradley
Frederick Albert Braman
Brian and Mary Crathern
Elizabeth J. Davidson
Theodore Davidson
Paul Andrew Dempsey
U. Paul F. Gareau
Virginia Gareau
Sandra Horowitz
Brian Leo Kelly
Stephen Louis Klincewicz
Barbara Pickering Koop
Christopher F. Lethbridge
Margaret (Parent) Maclaren
Mildred Maclean
Peter Dimaratos Negos
Steven Richards
Pamela D. Stewart
Hal Wilson

*Note: The lists on this page include those who have given McGill permission to publish their names.

Generous benefactors remembered

McGill is thankful for bequests, both large and small, that it has received over the years. The University depends on these forward-thinking donors to build a bridge to a brighter future for its students. Below is a list of bequests that the University received during the last fiscal year, which ended on April 30, 2014.

In Memoriam

Dr. Donald W. Baxter
John Alexander Belford
Estate of Elizabeth Gordon Edwards
Hess B. and Diana Finestone Foundation
Estate of Freda Fradkin in loving memory of her beloved nephew, Arnold Fradkin
Estate of Leonore Frohman
Late Dr. Stanley B. Frost
Estate of Emily T. Fulton
Estate of Bruce Lionel Funt
Estate of Dr. J.C. Humphreys
Estate of Bernard L. Isaacs
Estate of Catherine Kollar
Estate of Helen Elizabeth Lane
Legs de Hélène Linder
Zelda Litovsky
Estate of Joan Marshall
Estate of Joseph D. Martin, M.D.
Estate of John Arthur Neal
Dr. Doris Nunes Collins
Estate of Harold Penner PhD
Michael (Mike) Politis
Estate of Muriel Radcliffe (Lennard)
Legs de Mme Jemima Ritchie Goudreau
Estate of Leo Scherman
Estate of Marie F. Shimman
Stella and Adolf Ulman
David A.C. Walker
Estate of Prof. Roland James Wensley
Estate of Alan L. Wilkinson
Estate of Isabel Clarke Dickson Woodrow

Our Deepest Gratitude

From one planned gift, a beginning.
From many planned gifts, a future.
A Cup of Tea and a Cause to Celebrate

A bequest from Montreal merchant James McGill established McGill some 193 years ago, and the University today continues to rely on the generosity of supporters to maintain a standard of excellence beyond what public funding can provide.

To recognize and honour this generosity, McGill hosts an annual Tea with the Principal for members of the McGill 1821 Society and the Macdonald Legacy Society. This year’s event, held on May 13, 2014 at the Mount Royal Club, marked a special opportunity for members to meet Professor Suzanne Fortier, McGill’s new Principal and Vice-Chancellor.

Members also had a chance to hear from Lindsay Osso, BSc’14 (see speech excerpt below), a neuroscience student and recipient of a Greville Smith Scholarship. Osso spoke passionately about her McGill experience and the role that philanthropy has played in enabling her to focus on her studies and extracurricular activities, including participation in the Neuroscience Undergraduate Council and various intramural sports.

“Being a Greville Smith Scholar has provided me with opportunities that I would otherwise have been unable to financially pursue. Undergraduate research positions often require a large amount of work with little monetary compensation, but have been necessary to provide me with the experience required for acceptance into one of the world’s best neuroscience PhD programs and have allowed me to discover what I want to do for the rest of my life. And most notably, last winter I was able to spend an amazing semester on exchange in Auckland, New Zealand. It is to the philanthropy of donors that I owe my sincere thanks for many of these experiences.

On behalf of the many beneficiaries of the remarkable generosity of everyone in this room, I would like to sincerely thank all the donors who establish awards such as the Greville Smith Scholarships or provide other monetary contributions that directly affect the lives of countless students, like the Greville Smith Scholarship has for me. You have provided a unique and outstanding opportunity to incoming students at McGill who are driven to, and succeed at, doing amazing things with their lives. We are all indebted to you.

Thank you.”

Lindsay Osso, BSc’14
Greville Smith Scholarship Recipient