

# Partners Through Giving

NEWS FROM YALE'S OFFICE OF PLANNED GIVING

Fall 2011 | Volume 5 | Issue 1



## A Note From the Director



L to r: Laura J. Becker, Mary Beth Congdon, Betsy D. Gorecki, Eileen B. Donahue, and Carrie M. Lovelace

the important role each of you has played in reaching this historic milestone. Your support has helped to permanently strengthen the University.

You have made gifts to endow scholarships for Yale undergraduates and provide financial aid for students in our Graduate School of Arts and Sciences and across our professional schools of Architecture, Art, Divinity, Drama, Engineering, Forestry & Environmental Studies, Law, Management, Medicine, Music, Nursing, and Public Health.

In addition, you have made plans to endow professorships, establish international travel fellowships, support innovative scientific and medical research, expand the curatorial staffs of our museums, galleries and libraries, and enhance programs in many specific areas including the arts, athletics, and the environment.

It continues to be immensely gratifying for me and my planned giving colleagues to work with you to create gift plans that fulfill your personal, financial, and philanthropic goals. We are inspired by your vision and foresight. And we celebrate your strong sense of what Yale means to each of you. As Yale Legacy Partner Dr. Richard A. Ya Deau '53 wrote: "Yale remains 'that special place' because it reaches so far beyond an education—it prepares one for a lifetime of encounters with all of the elements that make us humane, thoughtful, sentient, hopeful, and fulfilled for the future."

Thank you for helping build the future of this special place, and for allowing us an opportunity to thank you, our Yale Legacy Partners, for your generous and loyal support of Yale Tomorrow.

With warm regards,

Eileen B. Donahue

University Director of Planned Giving

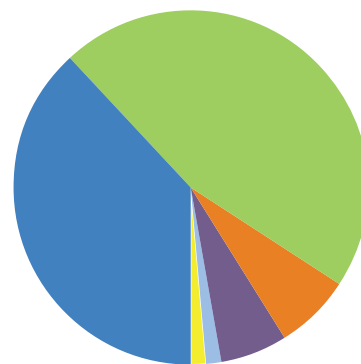
My colleagues and I extend our warmest thanks to all who, as Yale Legacy Partners, have supported every priority of the Yale Tomorrow campaign: Yale College, the Arts, the Sciences, and the World.

Bequests and other planned gifts of \$707 million comprised nearly 20 percent of the Campaign's extraordinary \$3.886 billion achievement. We deeply appreciate

## Total Planned Giving Contributions During the Yale Tomorrow Campaign

Yale concluded the largest and most successful campaign in its history on June 30, 2011. An extraordinary \$3.886 billion was raised, with nearly twenty percent, or more than \$707 million, in the form of bequests and other planned gifts.

YALE TOMORROW TOTAL PLANNED GIVING CONTRIBUTIONS



■ BEQUEST INTENTIONS:	\$327,800,943
■ REALIZED BEQUESTS:	\$269,800,881
■ LIFE INCOME GIFTS:	\$48,165,931
■ DONOR ADVISED FUNDS:	\$42,954,131
■ CHARITABLE IRA ROLLOVERS:	\$9,254,792
■ OTHER PLANNED GIFTS:	\$9,818,157

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# Class of '61 Yale Legacy Partners Boost 50th Reunion Gift



“ As Yale Legacy Partners, you deserve not simply our applause, but a standing ovation for your extraordinary commitments to the University through planned gifts and bequests. Your gifts have prepared Yale for a great tomorrow. All of us are deeply grateful. ”

—Inge T. Reichenbach, Vice President for Development, addressing the Yale Legacy Partners luncheon attendees

The year is 1961—John F. Kennedy is sworn in as the 35th president of the United States; Alan B. Shepard becomes the first American in space; *West Side Story* wins the Academy Award for Best Picture; and Ray Charles and Patsy Cline fill the radio waves. The football team, one of the greatest in Yale’s proud history, is undefeated.

They were called by *The New Yorker* magazine “the brightest ever” to enter Yale. Fifty years later, in celebration of their reunion in June 2011, more than 540 members of the Class of 1961 contributed an impressive \$11.8 million to the University. Of that total, 54 percent, nearly \$6.4 million, was in the form of planned gifts. These gifts, from more than forty classmates, included bequest intentions and life income gifts such as charitable gift annuities, charitable remainder trusts, and contributions to pooled income funds. In addition, twenty classmates took advantage of the extension of the charitable IRA rollover and made distributions directly from their IRAs to Yale.

Just before their reunion, several planned gift donors from the Class met at the annual Yale Legacy Partners luncheon in May. Although they chose a variety of different planned gifts, these Yale Legacy Partners share a deep connection to their class, and a common goal to “give back” to the University that contributed so much to their lives.

**Ronald O’Connor, M.D.** documented his intention to include Yale College, the School of Forestry & Environmental Studies, and Yale Crew in his estate plans.

**Reunion Gift Chair Vincent Teti** made a direct transfer from his IRA to support three specific projects: the Class of 1961 Yale Cancer Center Initiative to help advance cancer research and enhance patient care; the Class documentary, *1000 Voices—1961, The Movie*; and the Friends of International Security Studies Fund.

**Allen Young**, a new Yale Legacy Partner, attended the luncheon celebration for the first time. To commemorate his 50th reunion, he informed the University that he has remembered Yale in his will.

To mark his milestone reunion, **Alan Blanchard** told Yale that he has planned an unrestricted bequest for the University. He also established two charitable gift annuities which make fixed quarterly payments to him for his lifetime. Alan directed the first to Berkeley Divinity School and the second to the Yale Cancer Center.

In addition to his outright gift to the Alumni Fund for the Nathan Hale Associates scholarship program, **Robert F. Marvin, M.D.** also made a bequest intention on the occasion of his 50th reunion.

These enthusiastic and generous Yale Legacy Partners, together with so many others, not only provided a significant boost to the Class of 1961’s 50th reunion effort, but also contributed to the Yale Tomorrow campaign’s momentum during the final “push to the finish.”

Above: Class of 1961 Yale Legacy Partners who attended the annual luncheon at the Greenberg Center (l to r): Ronald O’Connor, M.D., Vincent Teti, Allen Young, Alan Blanchard, Robert Marvin, M.D.

## Gift Links Scholars Across Generations

Two young scholars arrived at Yale. Both studied literature and classical languages; both played musical instruments. Both were avid runners and loved the works of James Joyce. Both hailed from Litchfield County, CT, and both were the first in their family to attend college. Despite these striking similarities, the two never met. The first, Francis J. Glasheen, from Torrington, graduated from Yale College in 1933 and went on to earn his doctorate in English at Yale in 1940. The other, Bethlehem native Justin Hudak, expects to graduate from Yale in the spring of 2012.

Though separated by time, these scholars are united by an act of generosity. Frank Glasheen went on to become a beloved professor of English at various universities, leaving behind a distinguished legacy when he passed away in 2006. Joan Kerelejza, a professor of English and Frank's former student and



Joan Kerelejza and Justin Hudak '12

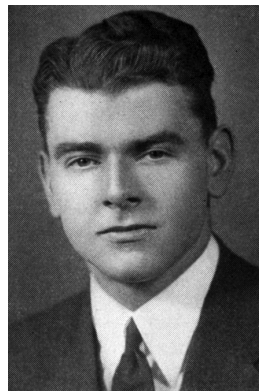
close friend, chose to honor his memory by establishing the Francis J. Glasheen Scholarship Fund. Joan gave real estate and distributions from her individual retirement accounts to Yale to endow the scholarship. "I wanted to make it possible for deserving students to attend Yale, as Frank did, by receiving a scholarship," said Joan. In addition, she has made the scholarship fund a beneficiary of her estate.

Justin Hudak '12, a senior residing in Morse College, is the inaugural recipient of the scholarship, which he has held since his freshman year. A classics major, Justin enjoys his studies in English, linguistics, Greek, Latin, and other languages. He hopes to follow his baccalaureate studies with a doctoral program in classical philology and, like Frank, become a university professor.

Joan and Justin correspond and have met on several occasions during Justin's years in New Haven. In Joan's eyes, Justin is an outstanding Glasheen scholar. She comments, "Justin is certainly representative of the multitalented Yale student body. It has been my pleasure to get to know him."

Frank and Justin may not have had the opportunity to meet and become friends at Yale, but their lives are profoundly intertwined. Thanks to Joan's generosity, Frank's legacy lives on. And, thanks to the Francis J. Glasheen Scholarship Fund, Justin's legacy has just begun.

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Frank Glasheen '40 PH.D.



Medical student Leonard Edokpolo '12 M.D. examines a patient at HAVEN

### *Fund for HAVEN Free Clinic Advances Community Collaboration*

John Allen Jones '58E, '59 M.S., has a keen interest in nurturing programs that strengthen Yale's relationship with the larger New Haven community.

Since 2009, John has been an enthusiastic supporter of the HAVEN (Healthcare, Advocacy, Volunteerism, Education, Neighborhood) Free Clinic, a collaborative project of Yale and the Fair Haven Community Center. HAVEN's model is unique, in that it includes students from all of the Yale health disciplines: medicine, nursing, physician associates, and public health.

At the HAVEN Clinic, underserved New Haven residents receive access to medical care, while students have the opportunity to broaden their clinical education by volunteering at a community-based facility. Its programs are completely free, and are supported entirely by donations of time and services.

Emily Thomas comments "My role as the education co-director has been a defining experience. As a Yale medical student, I memorized facts about how the body works, but as a volunteer at HAVEN, I see these facts take shape in a dynamic and complex person."

Through gift annuities that he previously established with Yale, John has created an endowed fund which will ensure long term funding for the student run clinic. John requested that the fund be named in honor and memory of Dr. John B. Goetsch, a longtime urological surgeon in New Haven and assistant professor of surgery at Yale School of Medicine, who was a loving and wise mentor to John in his youth. Their friendship lasted thirty years, filled with many shared times and fond memories.

John noted, "It's hard to overstate my joy at learning that a small gift annuity, given years ago, had become a substantial sum that could now be used to support the work of the HAVEN Free Clinic, a project that brings enormous benefits to everyone it touches—both at the University and in the city of New Haven."

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## Charitable IRA Rollover: A Window Is Still Open



During the course of the Yale Tomorrow campaign, nearly 500 alumni and friends transferred more than \$9.2 million in charitable IRA rollover gifts to Yale.

Whether IRA rollover contributions were directed to the Alumni Fund, to financial aid, to a specific program in the Graduate School of Arts and Sciences, or to one of Yale's professional schools, all had an immediate impact on the University.

Through December 31, 2011, individuals age 70½ and older can still make charitable gifts directly from individual retirement accounts. Donations of up to \$100,000 per year are not taxable and can satisfy minimum distribution requirements. To take advantage of the opportunity to make gifts directly from your IRA, please contact us at 800.445.6086 or [development.plannedgiving@yale.edu](mailto:development.plannedgiving@yale.edu), or visit us at [www.yale.planyourlegacy.org](http://www.yale.planyourlegacy.org).

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