



ONE UNIVERSITY.
Many Lasting Legacies.



UNIVERSITY
OF MANITOBA

| Planned Giving

There is nothing more important to the development of our increasingly global world than a solid education. When you give a gift to the University of Manitoba it has a lifelong impact. Each gift has the power to make a difference and provide our students and faculty with an environment that encourages innovation, leadership and excellence. Your support resonates through the outstanding students we graduate, the ground-breaking research we conduct and the state-of-the art facilities we construct.

The University of Manitoba received its first donation in 1885 through a bequest from Alexander Kennedy Isbister. He was one of the first Canadians to recognize the power of a planned charitable gift in opening doors to education. His example is intertwined with our commitment to being a leading university, open to all who wish to learn.

Planned Giving at the University of Manitoba

The purpose of this publication is to offer general information, not to render professional advice. We strongly encourage you to consult your lawyer, accountant, estate planner or financial advisor when planning a charitable gift.

Please see the Donors' Bill of Rights at
www.umanitoba.ca/admin/dev_adv/donors_rights/index.html

“It was a very easy decision to give back to the University.”

*- Emil Hain [BSc (CE)/59]
founder of the Bereziuk-Kushniryk
Archival Endowment Fund*



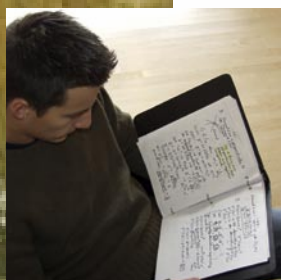
Leaving Your Legacy

The University of Manitoba is grateful for all that our donors make possible through their generosity. Your gift can be unrestricted, allowing us to direct it where support is needed most, or designated to benefit student awards, research or a specific department, school or faculty.

Where Your Gift Can Help

Student awards

Financial assistance helps our students attend university. By supporting student awards, you may play a role in encouraging a life-saving surgeon, award-winning novelist or great humanitarian. Awards come in many forms — scholarships, bursaries or prizes. Awards can be named in honour of a family member, professor or colleague and often encourage students in the same field as the person being honoured. When you establish a student award, your legacy lives on through the students who take with them the knowledge gained through their education.



Teaching opportunities

The quality of our faculty is critical to the quality of the university. By recruiting outstanding professors, we can attract exceptional students. Chairs and professorships are one way to help attract and retain top researchers and instructors.

You may also establish a legacy to help invite distinguished speakers, leaders, scholars or knowledgeable experts to share their perspective with students and faculty. In today's global culture, it is essential to expose students to a wide range of knowledge. Our students put the knowledge they gain at the University of Manitoba to use when they enter the global community.

Faculty-specific endowment funds

These funds provide an extra source of financial support which allow the faculties to stay competitive with other institutions by purchasing new equipment, teaching aids and other tools needed for a top-quality education.

Research

With more than 35 research centres and institutes, the University of Manitoba is home to researchers who have won international acclaim for their work on HIV/AIDS, Rh disease and climate change, to name just a few. As the only research-intensive and doctoral university in Manitoba, funding for research is necessary for us to effect positive change in the world.



Faculties and Schools:

- Faculty of Agricultural and Food Sciences
- School of Agriculture
- Faculty of Architecture
- School of Art
- Faculty of Arts
- Clayton H. Riddell Faculty of Environment, Earth, and Resources
- School of Dental Hygiene
- Faculty of Dentistry
- Faculty of Education
- Faculty of Engineering
- Extended Education
- Faculty of Graduate Studies
- Faculty of Human Ecology
- I.H. Asper School of Business
- Faculty of Kinesiology and Recreation Management
- Faculty of Law
- Marcel A. Desautels Faculty of Music
- School of Medical Rehabilitation
- Faculty of Medicine
- Faculty of Nursing
- Faculty of Pharmacy
- Faculty of Science
- Faculty of Social Work
- University 1



Libraries

Libraries, essential to the mission of the University of Manitoba, provide access to knowledge and support the university's teaching, research and community service programs. Your gift can help us continue to provide more texts as well as the most up-to-date information services essential to the pursuit of knowledge for everyone at the university.

Capital projects

More than a century ago, all that made up the University of Manitoba stood on a patch of land alongside Winnipeg's famous Red River. Today, our campus has grown to include floating laboratories in the Arctic, community outreach programs that help people in all corners of the province, and buildings all over Winnipeg. In order for the university to continue expanding as needed, it is crucial that we upgrade our facilities and build modern teaching and research space for our faculty, students and staff. Naming opportunities allow the university to recognize you or someone you would like to honour.

Endowment funds

When you make a legacy gift, you can often invest it as an endowment fund in the University Investment Trust (UIT). Gifts to the university are invested in perpetuity, and a portion of the income earned on these investments is allocated on an annual basis to support the designated purpose.

Endowment funds are an integral part of the university in funding long-term priorities.



Bequests

The University of Manitoba has benefited from the generosity of many individuals who have left gifts in their wills. Bequests can be directed to an area of your choice, or left unrestricted to allow the university to apply them to the area of most need. Your estate will benefit from a tax receipt equal to the amount of any gifts to charity. Up to 100% of your net income can be claimed in charitable donations in the year of death and the preceding year.

“It’s just so pleasant to know that I can help somehow.”

– Alison Philips, who with her late husband Stephen, is founder of the Stephen and Alison Philips Bursary in Environmental Studies.

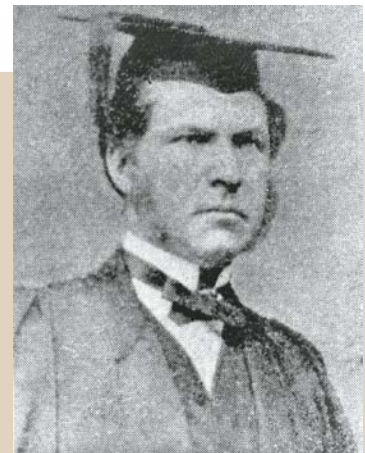
Sample Will Clause, Unrestricted Bequest

I direct my Executor or Trustee to pay or transfer (the whole of my Estate; the residue of my Estate; ____ percentage (%) of my Estate; or the sum of \$____) to The University of Manitoba at Winnipeg, Manitoba, Canada for the general use and purpose of The University of Manitoba in its absolute discretion. The Receipt of the Comptroller or other designated officer of The University of Manitoba shall be a good and sufficient discharge to my Executor or Trustee.

Sample Will Clause, Restricted Bequest

I direct my Executor or Trustee to pay or transfer (the whole of my Estate; the residue of my Estate; ____ percentage (%) of my Estate; or the sum of \$____) to The University of Manitoba at Winnipeg, Manitoba, Canada for the general use and purpose of _____ in its absolute discretion. The Receipt of the Comptroller or other designated officer of The University of Manitoba shall be a good and sufficient discharge to my Executor or Trustee.

The University of Manitoba received its first bequest in 1885 from Alexander Kennedy Isbister. A Metis man, Isbister was born in the Red River District in 1822. He left in 1842 to study education and law at Aberdeen and Edinburgh universities in Scotland, because there were no opportunities for university education in the Red River District at that time. Isbister never returned to Canada, but he never forgot his birth country. When he died, he left \$83,000 and over 4,000 books to the new University of Manitoba, Western Canada’s first university. What was particularly striking was the condition of his bequest: the gift was to be used for scholarships and prizes for those who merited them, regardless of sex, race, creed, language, or nationality, a visionary statement at the time. Today, Isbister Undergraduate Scholarships are still awarded to deserving students.



Securities

Publicly Listed Securities

Stocks, bonds, and mutual funds are a great way to provide a gift to the University of Manitoba while avoiding the tax on capital gains which may otherwise be applicable on these items. The University of Manitoba can accept both electronic and certificate shares. The university can also accept donations of private securities and flow-through shares.

You can donate shares during your lifetime or in a will. Charitable tax receipts are issued for the end-of-day trading value on the date of the transfer of ownership.

For testamentary gifts of shares, the charitable tax receipt is based on the value of the shares at the date of death.

“I would like to thank all donors that give money to us university students. We really appreciate it and hope that one day we can return the favour to future students.”

*– Krister Toews,
scholarship recipient*



John Bingham's gratitude for his education prompted his \$1 million gift.

“Warm Feeling” Triggers Gift of Stock

The Bingham Chair in Gastroenterology was named for the generosity of John Bingham who graduated from the Faculty of Medicine in 1940. Bingham donated \$1 million worth of stock to the university when he was 90. Bingham says the donation comes as a form of repayment for the education he received. “I feel that any graduate who has gone on to success is indebted to the university for their education,” he says. “I always felt a warm feeling towards Manitoba.”



U of M Retiree Supports Child Development

A University of Manitoba expert in child development has donated a legacy gift of life insurance to the university, but she has also started her legacy now by providing \$2,000 a year annually toward the support of graduate students who research child development.

Lois Brockman started the Graduate Thesis Award in the Area of Child Development. She hopes more students will choose to dedicate their research to this field, equipping them with the tools they need to better understand development in the vital early years of a child's life.

"I would like to see that graduate students who become the future teachers of child development have support for their theses research," she says, adding it is difficult at the graduate student level to obtain funding.

"This scholarship has really made a difference for me, not just for paying tuition, but it also really boosted my confidence and motivates me to do even better. Thank you!"

- Janet Yuen, scholarship recipient

Life Insurance

Not only can life insurance help ensure a family's financial security after a death, it can be used as part of a financial plan to accomplish a substantial gift to the University of Manitoba while preserving the value of your estate for your family.

There are three common options available to benefit your estate planning while helping to achieve philanthropic goals: donation of an existing policy, purchase of a new policy, or designating the university as the beneficiary of an existing policy.

Donated life insurance policies are eligible for charitable tax receipts based on the fair market value of the policy. Tax receipts are also issued for ongoing premium payments on donated policies.

Real Estate

Creative planning can make a gift of real estate an attractive option for a philanthropic person. There are various ways to donate real property: an outright gift, by way of the residual interest, as a gift in a will or to fund a charitable remainder trust.

With limited exceptions, gifts of property to the university will be sold. The proceeds of the sale, less any costs incurred by the university in undertaking the gift, will be directed toward the use agreed upon between the donor and the university.

For outright gifts of real estate, charitable tax receipts are issued based on the appraised fair market value of the donated property.

“At the University of Manitoba, I can obtain a master’s degree in Community Health Sciences and specialize in Aboriginal Health. This would help me become the best doctor I can be and help my community in the best way possible.”

– Ashley Blais, a U of M medical student of Metis heritage, says the University of Manitoba is a place where Aboriginal students can achieve educational success.



“Coming from a rural area, I know the challenges one faces when going to university.”

– Dr. John Downey

Grad Gives the Gift of His Roots

John A. Downey [MD, BSc (Med)/54] who grew up near Nokomis, Saskatchewan, has left his family’s farm to the University of Manitoba in his will as a way of showing his gratitude for the medical education he received at the university.

“My roots are on that farm, and by giving this gift I’m transferring that over to the University of Manitoba which will then transfer it to the students,” says Downey. “This is financially advantageous as well because I expect that the land will only improve in price and it allows me to give something of value that I don’t have in cash.”

This gift, once realized, will add to a \$90,445.93 endowment fund – set up by Downey with contributions from family and friends – for the Victoria and J. Stuart Downey Entrance Scholarship in Medicine in honour of his parents. The scholarship will support Aboriginal students entering the Faculty of Medicine.

Trusts

An individual may create a trust in which all or a part of their assets are left to the university when the trust terminates. Trusts can be established using cash, bonds, securities, real estate or other appreciable assets. You or your family may receive the income from the trust until it terminates.

Charitable Remainder Trusts receive a charitable tax receipt upon their creation based on the future value of the amount to be left to the university when the trust terminates. Other trusts receive tax receipts when the assets are received by the university.

Trusting in education

John Bernard Watson was born in Williamsburg, Ontario, the eldest of six children. In 1908, he earned a teaching certificate and taught on and off for the next 15 years. He also worked as a farmer, accountant, entrepreneur, and storekeeper. Watson understood the importance of higher education and was dedicated to helping those in need.

Watson created a trust in his will to assist his nephews and nieces with tuition costs for their university educations. When the trust terminated, part of the remaining funds were transferred to the University of Manitoba and used to create the John Bernard Watson Loan Fund. His will stipulated that the money be used to assist students in need of "...financial aid in order to take or complete any university course leading to a professional degree."



The John Bernard Watson Loan Fund will be a valuable resource for students in need of emergency funds.

Pension Funds

It is possible, easy and can help preserve your estate value to make donations through beneficiary designations on your RRSP or RRIF savings. You will receive a charitable tax receipt for the value of your gift to be used on your final tax return. Also, naming a beneficiary other than your estate removes these assets from probate and executor fees.



Upon his retirement, DeLloyd J. Guth, professor of law and legal history at the University of Manitoba, and his family created a substantial endowment to establish the first ever visiting lectureship in the Faculty of Law.

The DeLloyd J. Guth Visting Lectureship in Legal History will bring one visiting scholar to the university annually to give a university lecture and participate in educational programs with faculty members and graduate students.

"I want the outsider to bring fresh ideas that will enrich the work of students and colleagues," says Guth. "These new ideas will contribute historical and comparative perspectives to our law school's open, intellectual culture."

Gifts In Kind

A gift in kind is a non-cash donation and usually includes items such as personal effects, archival materials, artwork and equipment. The University of Manitoba will accept gifts in kind that can be used on campus. When possible, a tax receipt will be issued for the fair market value of the gift.

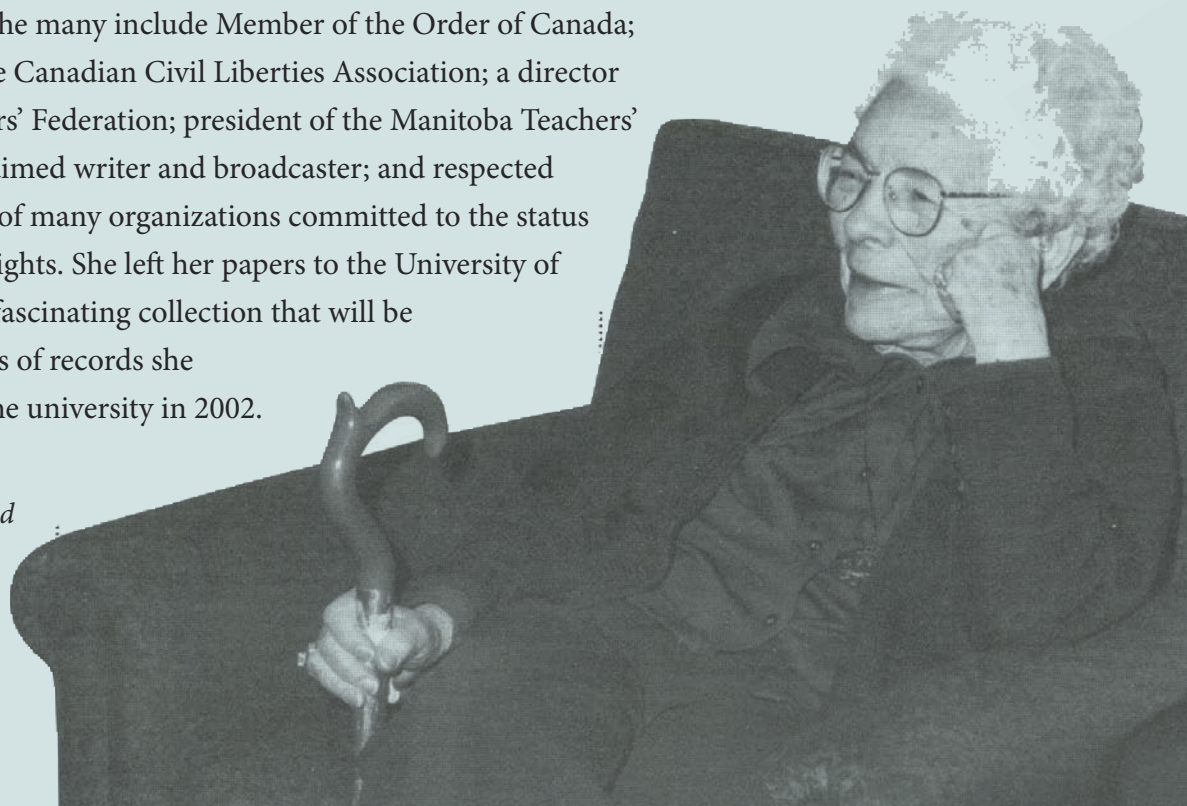


“It’s a treasure trove because of who she was. Anyone interested in education, women’s rights, the Jewish community in Winnipeg or any of the activities Sybil Shack was involved in will be able to use these records.”

– Shelley Sweeney, head of Archives and Special Collections at the University of Manitoba

In her 92 years, the late Sybil Shack [BA/29, BEd/45, MEd/46, LLD/69] amassed an extraordinary list of achievements and accolades. A few of particular note among the many include Member of the Order of Canada; national president of the Canadian Civil Liberties Association; a director of the Canadian Teachers’ Federation; president of the Manitoba Teachers’ Society; nationally acclaimed writer and broadcaster; and respected member and supporter of many organizations committed to the status of women and human rights. She left her papers to the University of Manitoba in her will, a fascinating collection that will be added to the four metres of records she previously donated to the university in 2002.

Sybil Shack’s contributions to Canadian Society earned her the Order of Canada.



When he was 90 years old, the late John Hennesey [BSc(EE)/37] decided to make a contribution to the University of Manitoba through a gift annuity.

“I liked the idea,” said Hennesey.

What made an annuity attractive to Hennesey was that the university would retain \$5,000 of his \$20,000 investment for immediate use, while the remaining \$15,000 went to purchase an annuity on his behalf. Hennesey received a tax receipt for the \$5,000, which in turn gave him a tax credit of \$2,320.

Due to Hennesey’s advanced age at the time of purchase, he was given a phenomenally high interest rate of 18.5% on his investment, which in turn gave him a monthly payment of \$307.85.



“I’ve got enough to live on, so I could give a bit away.”

- John Hennesey

Annuities

A charitable gift annuity is an arrangement under which you make a contribution to the university and receive guaranteed payments for life. When the contribution is made to the university, we will retain a portion of it, either for present use or to build a future endowment – depending on your wishes - and a charitable tax receipt will be issued to you for the retained amount. The balance will be used to purchase (through a licensed insurance company) an annuity that pays the agreed rate of return to you. The payments, which may be tax-free depending on your age, can be made to you on a monthly, quarterly, semi-annual or annual basis.

Outright Gifts

Cash

Those who choose to give gifts of cash by personal cheque or credit card will receive a tax receipt for their gift. The entire amount of your donation will support your designated fund, or you may give an unrestricted gift which will go to the area of greatest need within the university.

Donor-advised funds

Donor-advised funds are available through financial advisors or some community foundations and can provide flexibility to donors in their charitable giving. You may choose to direct your donor-advised fund's annual disbursement to the university.

“We always think that if you belong [to] Manitoba, that you should support Manitoba.”

– Barbara McGregor

Students in the Faculty of Science will be seeing things more clearly now, thanks to a gift from the late Vernon McGregor [BSc(EE)/50] and his wife Barbara.

The couple purchased five Nikon Eclipse E100 Brightfield microscopes for the second-year labs, and two Nikon Eclipse E100 Phase Contrast microscopes for the third-year labs. The superior optics on the new microscopes will assist students studying live and color-enhanced specimens.

The McGregors made the generous gift in honour of their granddaughter Katelyn Roehl, while she was a student in the Faculty of Science. The gift comes on the heels of a previous gift they made to the Faculty of Engineering to honour their grandson Scott Roehl who graduated in 2008.



The couple is happy that one of their three children and two of their four grandchildren have attended the University of Manitoba. “The whole family’s involved,” Vernon said proudly.

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The McGregors’ granddaughter, Katelyn Roehl, at work with one of the microscopes her grandparents purchased.

In Her Father's Honour

The late Leslie Buggey graduated from the Faculty of Pharmacy in 1925, and shortly thereafter moved his family to Minneapolis for a job opportunity. Even though he moved to the United States, he never forgot the University of Manitoba and credited his career to his *alma mater*.

So when his daughter, Joanne Buggey, who also lives in Minnesota, decided to honour her father she turned to the University of Manitoba, and eventually came up with the idea of setting up the Leslie F. Buggey Graduate Scholarship in the Faculty of Pharmacy. Each year the scholarship provides up to \$10,000 for a deserving student.

Scholarships are often set up in memory of a loved one after they pass away, but Buggey decided to establish hers while her father was still alive so that he could see the process. "The first recipient really bonded with my father. It really meant a lot to my dad and provided him with a wonderful activity in the last four years of his life," says Buggey.

After her father passed away, Buggey kept up the tradition of getting to know each recipient personally, something that has been going strong for many years.

Buggey believes so strongly in the University of Manitoba and its students that she is going one step further and is helping to set up a Chair in Pharmacy to support the salary and research of a faculty position. She plans to leave the funds necessary to complete the funding in her will.



Joanne Buggey, left, with her aunt Elizabeth Buggey.

"I just hope that people will see that an average person can make a significant difference. This whole experience has been wonderful and I couldn't have asked for anything better."

– Joanne Buggey

International Gifts

The University of Manitoba is fortunate to have many friends and alumni from the United States and abroad. If you are living out of the country, there are several ways for you to support the university and to keep in touch.

Under the Canada–United States Income Tax Convention, a citizen of the U.S. is entitled to a charitable deduction for gifts to a Canadian university, provided he, she or a family member is or was enrolled at U of M. A family member includes spouse, child, grandchild, parent or sibling. Charitable gifts may include gifts of cash, stock, various planned-gift types or gifts in a will.

For alumni and friends who are living outside of Canada please contact us at planned_giving@umanitoba.ca for information.

Type of Gift	Advantages
Bequest	<ul style="list-style-type: none"> • Charitable deduction for taxable estates • Allows you to make a large gift at no immediate cost to you
Life Insurance	<ul style="list-style-type: none"> • Allows you to make a large gift at little cost to you
Real Estate	<ul style="list-style-type: none"> • Provides a tax credit to offset capital gains taxes accrued on property during lifetime
Charitable Remainder Trust	<ul style="list-style-type: none"> • Current income tax deduction • No capital gain recognition on appreciated assets • Diversification of investments • Payments for life or term of years
RRSPs/RRIFs	<ul style="list-style-type: none"> • Removes these assets from probate/executor fees • Allows you to make a large gift at no immediate cost to you
Gifts of tangible personal property	<ul style="list-style-type: none"> • Opportunity for valuable property to be protected and displayed by an educational and research facility
Charitable Gift Annuity	<ul style="list-style-type: none"> • Fixed and predictable payments • Guaranteed income for life • Current income tax deduction • Portion of payments may be tax-free
Outright gift of cash	<ul style="list-style-type: none"> • Current income tax deduction • See gift in operation during your lifetime
Donor-Advised Funds	<ul style="list-style-type: none"> • Allows you control over how your charitable gift is spent • See gift in operation during your lifetime



“The reason I had these opportunities is because people that have come before me have created them... I felt it was my duty to start creating those opportunities for other people.”

*- Taren Gesell [BComm(Hons)/08],
former President of the Commerce Students’ Association,
spearheaded a campaign to encourage classmates to support the
I.H. Asper School of Business after graduation.*



The Isbister Legacy Society Luncheon is an opportunity for the U of M to thank its legacy donors in person.

The Isbister Legacy Society

The Isbister Legacy Society was established in 1999 and represents hundreds of living and deceased individuals who have made a gift in their will or have established another type of legacy gift benefiting the University of Manitoba. The society allows the university to recognize individuals for their thoughtful gifts and to celebrate the successes of the University of Manitoba with them.

Too often the university has become aware of these special gifts only after the benefactor has passed away. At these times, proper gratitude cannot be expressed personally. Through the Isbister Legacy Society, the university can show its appreciation.

This society is named after our first benefactor, Alexander Kennedy Isbister, in honour of his vision for the university.





For More Information

The University of Manitoba is grateful for all that our donors, friends, alumni and supporters continue to do for us. The Planned Giving staff is available to answer any questions you may have. We would be pleased to put together a personalized and detailed information package highlighting tax benefits in making charitable gifts to the university along with customized will wording if you would like to leave a bequest. We can also provide you with information on various areas, initiatives or projects that you may wish to support.

For further information about planned giving at the university, or the Isbister Legacy Society, please contact:



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