



# Planning Matters

January 2009

## Following his father's footsteps

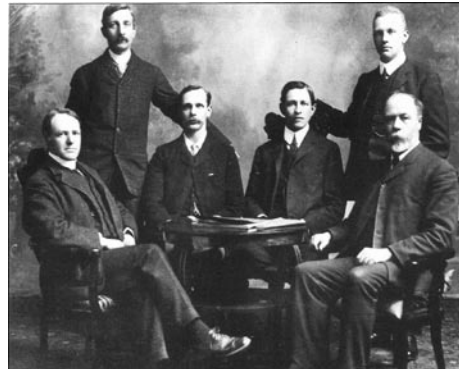
By Kathryn Kouk

It's good to remember your roots, and few people have roots at the University of Manitoba that go down as deep as the late John (Jack) Frank Allen [BA(Hon)/28]. His affiliations with the university go back to the early 20<sup>th</sup> century, and those ties led him to leave the institution a bequest of nearly \$1 million.

After graduating from the University of Manitoba in 1928, Jack Allen spent a year working with his father, Frank Allen – one of the original six professors the university hired when the Faculty of Science was formed in 1904.

Jack Allen followed his father's footsteps, pursuing a career as a scientist and professor.

His groundbreaking research in physics led him to be appointed as the Chair of Natural Philosophy (Physics) at the University of Saint Andrews in Fife, Scotland in 1947. He spent the rest of his career lead-



*L to R, Matthew Parker, Gordon Bell, A.H.R. Buller, Frank Allen, Swale Vincent, and R.R. Cochrance. Allen was the University of Manitoba's first head of Physics, and he was one of the original six professors in the Faculty of Science*

ing that university's physics department, as his father had done at the University of Manitoba years before.

In 1979 the University of Manitoba awarded Jack Allen an Honorary Doctorate of Science to recognize his achievements.

Jack Allen never forgot his roots and the start he got at the University of Manitoba, leaving a \$974,472.70 bequest to the university. He directed

the gift to the Dr. Frank Allen Family Library Fund, which supports "the acquisition of library materials in the fields of physics, architecture, home economics, art and design, and Winnipeg history."

Karen Adams, director of Libraries, is thrilled about the gift and says it will have a major impact because when the fund was established, it only had a balance of \$15,000. "That's a considerable change," she says.

The Dr. Frank Allen Family Library Fund will help the university acquire materials on Winnipeg's history, which will particularly benefit master's students in Archival Studies. Adams notes the University of Manitoba is currently one of only two institutions in Canada that offers this graduate program.

Jack Allen's legacy will continue through the many students and faculty that gain from the Libraries' resources.



### Save the Date!

### 2009 Isbister Legacy Society Luncheon

Thursday, September 10, 2009

We look forward to welcoming you to the University of Manitoba during Homecoming weekend for the Isbister Legacy Society Luncheon. Please mark the date in your calendar and look for an invitation in the mail this summer.



Dr. David Goodwin [MD, BSc(Med)/59] and the late Mrs. Sandra Goodwin [BA/58, B Ped/59, AMM/59].

## Helping students discover research

by Alexis McEwen

For Dr. David Goodwin education is more than memorizing lists from books. It is putting knowledge to the test through research, thinking critically about results and deciding if they are statistically significant. These things are done early in the Bachelor of Science (Medicine) program in the Faculty of Medicine.

Goodwin and his late wife Sandra left bequests in their wills to the Faculty of Medicine, where Goodwin's own passion for research was born.

The David and Sandra Goodwin Fund supports BSc(Med) undergraduate research and it will help provide medical students with resources to expand their learning.

"We are really delighted to be able to do something," Goodwin says. "I wanted to give back for the things that I got out of my time at the University of Manitoba, including a love of research from the BSc(Med) undergraduate research program."

He credits his experiences at the medical school for kicking off a productive career as a specialist in nuclear medicine. He was the chief of nuclear medicine at the VA Hospital in Palo Alto, California and was a professor of radiology at Stanford Medical School for 33 years.

# Benefactor's passion for music will go down in history

by Stephanie Fehr

Mary Louise Young [AMM/48] has been passionate about music for as long as she can remember. She learned to play on her grandmother's piano and that inspired her to pursue a music degree at the University of Manitoba. Along the way she also picked up an accompaniment—a love of history.



Young recently endowed an award in the Marcel A. Desautels Faculty of Music to establish the Mary Louise Young Scholarship to assist students who share her passion for music. She was just 16 when she came to the University of Manitoba from her family's farm in southwestern Manitoba. Her parents paid for her first year of university, but Young—the eldest of five children—decided to pay her own way after that so that her siblings, if they wished, would have a chance to further their education. "I taught piano part time and worked part time. With studying on top of that, it was a struggle," says Young.

Now part of her legacy will be encouraging other students to succeed.

While Young made a cash gift to establish the scholarship in her

name, she's also made a provision in her will to further support the award. "Everybody wants to save money tax-wise

and if someone else can benefit, it makes sense to make a gift in your will," she says.

Young is a passionate traveler with a fine appreciation for the history and music of a culture. She cites

the steel drums in Trinidad, a seniors' orchestra in Beijing, a professional dance competition in Buenos Aires, a museum of musical artifacts in Vienna, and concerts at historic halls in Europe as highlights in her travels.

Her own personal musical journeys are also being preserved in history, both through the Mary Louise Young Scholarship and through an antique that remains dear to her; the piano she practised on as a young girl—which is now 105 years old—has found a home in a museum in Cartwright, Manitoba, ensuring Mary Louise Young's love of music will go down in history.

# Women gain ground in legacy giving

By Beth Proven, CFRE, Manager, Planned Giving

A recent US News and World Report article<sup>1</sup> declared that women have surpassed men as the biggest givers.

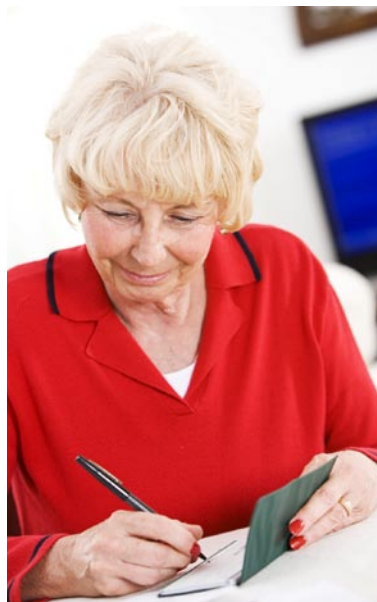
This article inspired us to look at the University of Manitoba's planned giving program to compare. Our findings did not quite support that declaration but did show a trend in that direction. Of the legacy gifts we have already received, usually from a bequest in a will, 60% of these were from men and 40% from women. Those who have told us that there is a future bequest to the university in their wills number slightly more men than women, at 54% to 46%. However, as legacy givers to the U of M, women are gaining ground.

In recent decades, as women work more and are drawing more equitable salaries, women are more en-

gaged in the family's financial concerns than ever before.

I meet a lot of very smart, financially aware women who are making plans to leave their personal legacies to the U of M through gifts in their wills (see the article on Mary Louise Young on page 2). These women not only understand the feelings of satisfaction and reward that establishing a legacy gift can bring to their lives, they also understand the significant tax benefits to their estates when they do so.

In Manitoba, a bequest of cash will return 46.4% of that bequest back to



your estate as a tax credit. While tax savings alone do not usually motivate an individual to make a bequest, they can be beneficial. In the year of death, 100% of your

estate is going to be considered income. But, in the year of death and for one additional year, you may claim the equivalent of up to 100% of this income in charitable gifts.

## Sample Will Clause

*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.*

### Example:

A donor leaves a \$300,000 cash bequest to a charity. The donor's total net income reported on the terminal tax return is \$300,000. The will provided for no other charitable bequests, and the donor had completed no charitable gifts during the final year of life.

Bequest	\$300,000
Amount creditable on final return	\$300,000
Tax credit (assuming combined Manitoba and Federal tax credit of 46.4%)	\$139,200
Net cost to make gift	\$160,800

Surplus tax credits can be carried back to the previous year. Bequests of publicly traded securities made to the university in your will result in an elimination of the capital gains taxes on those assets, further offsetting the cost of the gift.

<sup>1</sup> *Women and Philanthropy: 4 Ways to Get Started*, US News and World Report, September 23, 2008

# An architecturally sound decision

By Kathryn Kouk



Now retired, Robert Siddall [BArch/48] and his wife Nancy Siddall divide their time between homes in Victoria and Palm Desert, California.

**B**ob Siddall had always hoped to leave a legacy gift to his *alma mater*, so recent news that a bursary fund was being established in memory of his former professor and mentor, John A. Russell, seemed just right.

“I was hoping to do some small, individual piece of good for the (Faculty), helpful to students that came after me, and the John A. Russell Alumni Bursaries offered that opportunity.

“When my wife read the story of the bursary she exclaimed ‘that’s you!’ and the decision was made,” Siddall says.

“John Russell was forever helpful, an outstanding teacher, and an inspiring person to work with. He always built you up, never leaving you deflated. I always seemed to be struggling financially and he found ways to help—with jobs from mark-

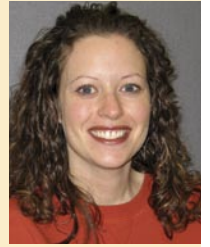
ing student work to painting sets at the Playhouse Theater for the Winnipeg Ballet. I know he gave aid to many others.”

After graduating, Siddall moved to British Columbia, eventually settling in Victoria where he would practise for nearly 40 years. He and his partners designed a complete cross-section of the work available in a small city – from doing kitchen alterations to work at the University of Victoria where the firm was responsible for the campus plan and many of the early buildings.

Attendance at his 50th reunion in 1998 convinced him to convert good intentions into solid plans. He says the perfect vehicle for those plans is the John A. Russell Alumni Bursaries.

## Our team is growing!

We are pleased to announce the newest member of the Planned Giving team.



Monica Carlberg recently started in the new position of Planned Giving Officer. Monica has been with the University of Manitoba Departments of Development and Advancement Services since June 2002, first as the Prospect Research Coordinator and then as the Assistant to the Director of Development. Prior to that she worked in the Development Office at Oklahoma State University. Monica is a graduate of the University of Manitoba with a B.Sc. in Agribusiness.

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