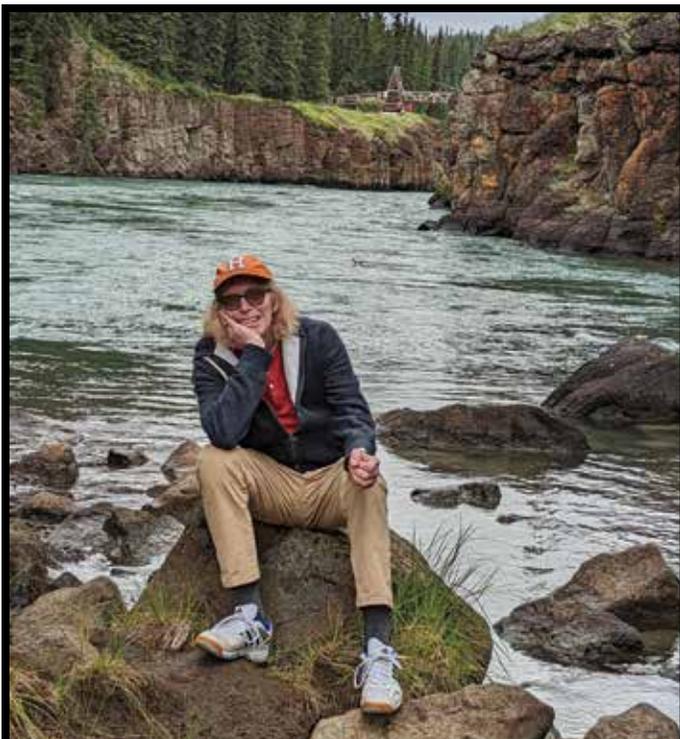




SPARKING PASSION THROUGH CARLETON: A SPOTLIGHT ON TED HANNAH

By: Jenna Hobin, B.A. Hons



- TED HANNAH

“I think it’s important to do your part, and hope that the next generation does theirs.” Although Ted Hannah grew up in a humble household, his parents were dedicated community volunteers who passed on their values of philanthropy to him.

While Ted currently spends his time perusing the pages of new literature and walking along the waterfront path of the Vancouver Seawall, some of his fondest memories were shaped across the country at Carleton University. From the administrator for student-aid to Davidson Dunton—Carleton’s former President—Ted’s reminiscences of Carleton’s staff and faculty from his time as a student were one of his inspirations behind becoming a donor.

The other was his intrinsic passion to ensure that future generations of students can access the same opportunities he had received during his post-secondary studies. As a first-generation student in his family, the bursary he received meant that he could continue in Psychology through the summer months to complete his undergraduate degree.

Despite initially coming to Carleton to pursue a Science program in the 1960s, Ted was drawn to his roommate’s ‘Introduction to Psychology’ textbook that transpired into him declaring a Major in Psychology shortly after. This cultivated the pathway for Ted to later be offered a scholarship to attend his Master’s in Psychology at Carleton, and later paved the way for him to complete his PhD. As a recipient of financial aid throughout his time at Carleton, Ted acknowledged that this support is what enabled him to lead a 36-year long career as a Professor of Psychology, retiring as an Honourary Research Professor. This led Ted to make a gift in his will in hopes that it opens the doors for students to reach their aspirations, regardless of financial barriers—just as it did for him.

The process of creating a legacy gift with the Planned Giving team is one that sparked nostalgia for Ted, as it reinforced the caring community that made him proud to be an alumnus and donor. Ted recounted choosing Carleton for its reputation for serving veterans following WWII, and views his gift as a way to be a part of continuing its legacy of giving back to the community by helping students further their education.

As Ted said, “I never forgot how I got my start at Carleton. As a Professor, it was important to me to interest and excite students in my courses, and to support them as they struggled to find their way.”

THINK ABOUT YOUR ESTATE PLAN BEFORE YOU TRAVEL

By: Courtney Lanthier, Law Clerk at Fasken LLP



- COURTNEY LANTHIER

With winter sneaking up on us (rather quickly, I might add) and travel bans lifted, many law offices are bound to get an influx of calls and e-mails from clients wanting to review or update their estate plans before they travel.

While typically, Wills and Powers of Attorney are meant to be something you sign once and then don't think about for a while, it may be beneficial to take a quick look at your documents before going on a vacation. It is essential to make sure your wishes are still the same. Sometimes small changes such as removing a beneficiary, adding specific gifts to family or charities, or updating an executor can be done relatively quickly with a simple codicil.

Your lawyer may discuss the importance of the "disaster provision." It's a vital clause since it deals with the residue of an estate when spouses and children have all predeceased. In most cases, clients will decide on a few charities to split the residue or gift it to other family members. While it can be tough to think about this kind of scenario, it's a necessary provision to add to a Will to avoid any instances of dying without a valid will.

It is important to know where your will and other estate documents are stored and who you (or your executors/attorneys) can contact to obtain the relevant papers. We ensure our clients have a copy or, in some cases, an original of their documents. Once a client has signed their documents, we typically provide them with a hard copy of everything signed, and the original will is stored in a safekeeping facility.

If you have a signed Power of Attorney for Personal Care, you may wish to take one or two originals and provide them to your named attorneys. This is an acceptable practice since, in some cases, an original Power of Attorney for Personal Care may be needed rather urgently.

Reviewing your estate plans before you travel can provide you and your loved ones a little extra peace of mind. But most importantly, enjoy your vacation and safe travels!

“ While typically, Wills and Powers of Attorney are meant to be something you sign once and then don't think about for a while, it may be beneficial to take a quick look at your documents before going on a vacation. ”

FASKEN

THE BENEFITS OF DONATING RETIREMENT FUNDS – RRSPS/RRIFS

Registered Retirement Saving Plans (RRSPs) are one of the most important investments for Canadians and one of the most heavily taxed assets in an estate.

Donating your RRSPs or Registered Retirement Investment Funds (RRIFs) is a simple way of making a meaningful donation while enjoying significant benefits such as:

- You can choose to donate all or a portion of your retirement funds
- Redirect deferred taxes to charitable purposes
- Reduce the administrative duties of your executor
- Avoid probate and estate fees on RRSP/RRIF assets
- Keeps your gift private, if that is your wish
- Avoids contests by unsatisfied heirs

- Increase support for students or enhance academic programming at Carleton University
- Quick settlement of affairs

By naming Carleton University as a beneficiary of a registered plan, you will retain ownership and use of the fund during your lifetime, receive a tax receipt for the value of the plan, decrease probate fees by removing these assets from your estate, reduce your overall estate tax bill and most importantly, you will be supporting Carleton University students.

Ask for information about **“Donating Retirement Funds”** by e-mail at plannedgiving@carleton.ca.

THE IMPACT OF RECEIVING AN AWARD

“You could not have imagined my delight when I found out I was the recipient of a bursary! During the pandemic I have faced a wide array of hardships like I never had before. Concerning finances, I had a very hard time finding safe work throughout the summer as I am living in a household with a grandparent and two immunocompromised parents. I felt such relief when I received the bursary as I knew that my tuition for the upcoming semester would be partially covered.

I am in my final year of my undergraduate degree at Carleton with the aspiration to continue my studies at the postgraduate level. More specifically, I hope to enter the field of global health to work for ensuring a more equitable world for all. I will be sure to pay forward the goodwill that I have been lucky enough to receive.”

Olivia 4th year student



A MOTHER REMEMBERS HER DAUGHTER: THE KRYSZYNA RUDKO SCHOLARSHIP IN POLITICAL MANAGEMENT

Maria was born January 29, 1918 in a small town just outside of Kiev, Ukraine. Her father was a priest and this afforded Maria something rare for girls of her generation: an education. Maria excelled at school, but the Second World War interrupted her studies, and she was forced to work in a German labour camp as a translator.

Unable to return home after the war, she made her way through Europe, and ultimately emigrated to Canada with her husband Walter. They settled in Ottawa and had one daughter, Krystyna. Maria was always grateful for the kindness showed to her by Canadian soldiers after the war, and for the opportunities that Canada provided to her and her family for a peaceful and prosperous life. The Krystyna Rudko Scholarship in Political Management was established in honour of her daughter Krystyna, who tragically died before her mother, Maria, in 2012.

The Krystyna Rudko Scholarship in Political Management was endowed by a gift from Maria's estate and is awarded annually to outstanding graduate students enrolled in the Master of Political Management program. Each year when funds are awarded to students, Krystyna's name and legacy is proudly acknowledged and remembered.



HOW TO CREATE A NAMED MEMORIAL AWARD

Establishing a named award at Carleton University in memory of a loved one is a beautiful way to honour and create a lasting legacy for someone you care about.

Through scholarships and bursaries, donors make education possible and reward the outstanding accomplishments of students. Without student aid, many students would find it impossible to pursue a university education.

Scholarships

- Scholarships are awarded for academic merit to reward high-achieving students.

Bursaries

- Bursaries support deserving students in need of financial help.

You can establish an endowed award which exists in perpetuity, meaning you will help generations of young people succeed. The minimum amount required to establish an endowed undergraduate award is \$25,000 or \$50,000 for an endowed graduate award. These can be one-time gifts or pledged over five years. Alternatively, you may select to establish a new endowed award through a gift in your will.

For more information, please get in touch with the Planned Giving team at 613-520-3636 or by e-mail at plannedgiving@carleton.ca.

YOURS FOR THE ASKING

One of the easiest ways to arrange a charitable gift that costs you nothing now is to donate the remainder of an RRSP/RRIF. These are likely the most tax burdened assets that most Canadians own. We have developed an informative brochure about the possibilities of supporting Carleton and action steps. Please send us an e-mail at plannedgiving@carleton.ca asking for our guide to **"Donating Retirement Funds"**.

Endowments are important to enhance the quality of modern post-secondary education. They provide a source of permanent and growing income for student financial aid, research, library collections and so much more that base funding and tuitions simply cannot do alone. Is an endowment gift right for you? Ask for information about **"Gifts for Endowment"** by sending us an e-mail at plannedgiving@carleton.ca today.

Whether you are considering a revision of your current will, or you are about to have a will drafted for the first time, arranging a gift in your will to Carleton University is easy to do. Our guide contains valuable information and suggested wording that will assist you in discussions with your lawyer. Send us an e-mail today at plannedgiving@carleton.ca asking for **"A Gift by Will"**.



Please file this newsletter with your will or other estate planning documents. It may prove valuable down the road.

ADVANCING PHILANTHROPY

WHY DO PEOPLE DECIDE TO MAKE GIFTS TO CHARITIES IN THEIR WILL?

By: Holly Greatrex, BA/21, CFRE

When writing a will or drafting an estate plan, it is commonly known that many people leave gifts or bequests to family and friends, ensuring that their loved ones are cared for now and in the future. Perhaps not as well-known is that many individuals also choose to make a gift by will to their favourite charities - but why?

To answer this question, we decided to ask our community members directly. In 2021, we sent an e-survey on philanthropy to a select group of our alumni, donors, and friends, and this is what we learned.

When family and friends are cared for, there are many reasons why people arrange charitable gifts by will to their favourite charities.

No matter the reason, we are truly honoured and grateful to all the

people who have already chosen or are considering making a gift by will to Carleton University. Their thoughtful contributions will support Carleton University students and our mission for years to come.



FOR MORE INFORMATION, PLEASE CONTACT:

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Office: 613-520-3636
Toll Free: 1-800-461-8972

carleton.ca/planforgood

Or, email us at:

plannedgiving@carleton.ca



- Left to right: **Stefanie McLean**, Planned Giving Coordinator
Holly Greatrex, Director, Personal and Planned Giving
Meghan Maack, Senior Development Officer