



Supporting the Public Good *How One Person Can Make a Difference*

By: Laura Byrne Paquet, BJ/87

For eight years Doug Bullock (MSW/83) worked as a research assistant. However, he found the scientific work unsatisfying. “I was more interested in the people that we were actually doing the research on,” he says.

So, he applied to Carleton University’s Master of Social Work program and was accepted. That choice, he says, changed his life.

“It just blew my mind, the perspectives and knowledge that I gained,” he recalls. “It really just opened up my mind to how the world works.”

He went on to work for the Addiction Research Foundation, now part of the Centre for Addiction and Mental Health. There, it became increasingly clear to him that poverty and other social issues require further study.

When a friend in her forties was diagnosed with breast cancer, Bullock decided to start making substantial donations to causes he cared about, before he faced any serious medical issues of his own. “I wanted to start contributing while I’m still alive, so I could see the benefits.”

He approached the Personal and Planned Giving team at Carleton to discuss options. His

first step was to establish the Doug and Ollie Bullock Memorial Bursary for students in the School of Social Work, in honour of his parents.

He also arranged for part of his estate to go to the school. In addition, he contributes annually to the Centre for Studies on Poverty

and Social Citizenship, as he was intrigued by the centre’s research into issues as diverse as hoarding, harm reduction for those struggling with alcohol addiction, and social integration of Somali-Canadian youths. “They were working on different issues in different communities [and] to me, they were all fascinating.”

Bullock is no stranger to supporting the public good. For years, he has escaped Ottawa’s winters by travelling to the southern United States. After buying a travel trailer, he discovered that many state parks allow visitors to stay for up to three months in exchange for 20 hours of volunteer work per week.



Doug Bullock

“I’ve always been interested in nature. I like traveling and I’m practical; I like working with my hands,” he says. As a result, he has fixed fences, maintained trails and even cleaned outhouses in parks from Florida to Texas.

That no-nonsense spirit underpins his support for the School of Social Work as well. “COVID has brought more to the public attention to the inequalities in the world and in Canada,” he notes, adding that the school’s structural approach helps people and organizations recognize and overcome their built-in biases. He hopes that, by sharing his story, he can encourage other people to support social science research at Carleton.

A Passion for Perennial Learning: A Spotlight on Dr. Andrew Brook

By: Jenna Hobin B.A. Hons

“I don’t ever see myself not having graduate students, or stopping academic writing”. Andrew Brook--former Director of the Institute of Cognitive Science and retired Distinguished Research Professor in Philosophy--continues to dedicate his life to perennial learning and academia.

Prior to his retirement, Dr. Brook spent close to five decades working on Carleton’s scenic campus. As a senior academic, he felt compelled to marry his passions for giving back and enhancing student support by becoming a generous donor to Carleton University. This was reflected in the establishment of the Cognitive Science Graduate Scholarship in 2008 to support outstanding graduate students in the program proceeding from one year to the next.

At the time, Dr. Brook established the scholarship as an anonymous donor given his involvement in the building and administration of the Institute of Cognitive Science (ICS),

including welcoming the first roster of incoming undergraduate students in 1993, followed by PhD students in 1996. In his role as Director of the ICS, he saw the direct impacts of investing financially in the futures of students, which made him gravitate towards creating an endowment to provide lasting support.

“I wanted to take some of the financial pressure away from doing graduate work, and to help make that easier for students,” says Dr. Brook. He described the establishment of the award as being “as easy as making a phone call”, and has since extended his generosity to making a planned legacy gift through his life insurance policy.

He chose to naturally have this bequest divided between the Department of Philosophy and Institute of Cognitive Science—the two departments where he devoted his career.



Dr. Andrew Brook

Dr. Brook expressed that he is leaving it to the respective departments to allocate the funds at their discretion, ensuring that his support is based on priority need to create the most meaningful impact.

Despite being a retiree of Carleton University, Andrew Brook is still very well connected to our community of students. In addition to being a donor, he continues to commit his time to supervising research work, writing and working on a memoir for his grandchildren. Although he is making the most out of working from his home office here in Ottawa, Dr. Brook is looking forward to experiencing the bustling of students while taking in the views of the Rideau River from his ‘second home’ at Carleton.

“

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SEND THE REPLY CARD



A Gift by Will

When family and friends are cared for, we hope you will remember Carleton University in your estate plans. Your legacy gift will brighten the future of every student who is touched by your thoughtful generosity.

A gift by will is a deeply personal, forward thinking way to connect with our mission. When you want to reduce or even eliminate your final income taxes, a well-planned charitable gift to Carleton is especially rewarding. If you donate through Carleton regularly you might consider endowing your annual gift with a gift in your will. A legacy gift of \$25,000 can establish a named endowment that will provide about \$1,000 of income each year forever. The documents can be approved now and you can start or add to your fund when the time is right for you and ultimately with a gift in your will.

Supporting the mission of Carleton University should give you great satisfaction. We welcome the opportunity to work with you and your advisors to develop a gift plan that will be personally meaningful to you and bring maximum benefit to Carleton. You can consult directly with us to have a custom clause prepared for you or have your lawyer call us to discuss your plans in confidence.

For improvements and enhancements on campus are very important. A growing number of people have found that combining lifetime giving with a future gift is especially rewarding. If you donate through Carleton regularly you might consider endowing your annual gift with a gift in your will. A legacy gift of \$25,000 can establish a named endowment that will provide about \$1,000 of income each year forever. The documents can be approved now and you can start or add to your fund when the time is right for you and ultimately with a gift in your will.

If you would rather make an immediate impact your gift by will could be directed to capital funding. Buildings and classrooms age over time, and gifts that permit unrestricted use of the capital




Gifts for Endowment

What is an endowment fund? It is a pool of many different principal accounts that are invested in perpetuity by the university to support a variety of activities. Each endowment principal account includes the original capital value with additions made for inflation, market value increments and new capital gifts. Gifts for endowment never stop giving. The key concept is "in perpetuity".

Who gives to endowments? Savers, investors and long range planners are most likely to consider an endowment gift, and anyone else who understands the value that can be derived from a large and growing pool of resources. Endowed gifts allow you to permanently fund areas of the university in which you have a special interest and provide Carleton University with a meaningful and long-lasting financial legacy named endowment.

A FAMILY BURIAL
Tony and Sonia have 4 children and 11 grandchildren with another on the way. Tony is a Carleton alumnus, their 2 daughters are current and past members of Carleton's Phi Kappa Phi Honor Society in their spare time, they attend students in their spare time with a professional for some of their own international students. The extended Carleton family is now a global one with graduates around the world and their lives and have shared it back. The love to the university are strong. When planning their estate, Sonia felt strongly that they should arrange a donation for a library that would help foreign students. She had the idea of a permanent fund that would bear their family name and be an example for the generations that followed. It was a great matter to get on the paperwork at the university and to write a letter for their wish to create a legacy gift that would annually fund the library endowment. The gift was meaningful, they would have affected during retirement but savings additions to cover their life savings could be made and towards something important to them and that their family name would be remembered at Carleton forever.



Basic Guide for an Executor of an Estate

Being named as an executor of an estate can be a privilege but also a serious responsibility, not to be accepted lightly. It can take a great deal of time and require substantial effort. Few people who agree to act as an executor for a family member or a friend have an awareness of the range of responsibilities and obligations that are involved. It can appear to be very daunting and you might find yourself asking "What do I do next?"

The following is a checklist and basic guide outlining some of the activities that you will have to engage in to bring the affairs of even a simple estate to a satisfactory conclusion.

The list is by no means exhaustive and does not offer any legal advice or opinions. It is provided to help you ask the right questions and to provide a guide for you as executor.

What are the responsibilities and obligations?

Make necessary arrangements

- Locate the Will and read it thoroughly for any special instructions regarding funeral arrangements.
- In some provinces it is not unusual to have more than one will to deal with different assets e.g. personal and corporate.
- If the deceased owned real property and other investments in international jurisdictions there may be separate wills to deal with those assets as well.
- Assist the family in making funeral arrangements, if necessary.
- Take preliminary action to prepare for financial settlements and claims
- Ascertain any immediate cash requirements of beneficiaries.

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 the enclosed reply card today asking for **"A Gift by Will"**.

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"** on the enclosed reply card and send it back today.

If you are thinking about choosing an executor or wonder what the job entails, Carleton has a great little brochure that will help you make an informed decision. Check **"Guide for Executors"** on the enclosed reply card and send it back today.

or visit carleton.ca/planforgood

Carleton University


TOGETHER FOR GOOD

Please send me detailed information about:


- A Gift by Will
- Gifts for Endowment
- Guide for Executors

Please send the requested information above to my email at: _____ @ _____

Tax effective gift planning!



Secure website link.



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

Super Donors with Secret Identities

By Holly Greatrex, CFRE

Superman's alter ego, Clark Kent, is a mild-mannered reporter who prefers to stay out of the public eye. When Clark was growing up, his adoptive parents encouraged him to use his superpowers to do good and help humanity. At Carleton University, we are fortunate to have many "super donors" who use their "superpowers" to do good by supporting post-secondary education and outstanding students now and in the future.

These super donors may not wear capes or fight crime in tights, but their superpower -**philanthropy**- is key to making the world a better place. Yet, just like Clark Kent, they prefer to have a secret identity.

Donors have many reasons for privacy, and it is our job as gift planners to honour and uphold these confidentiality requests. Choosing to have a secret identity does not change the power or impact of a gift.

“ Super donors may not wear capes or fight crime in tights, but their superpower -**philanthropy**- is key to making the world a better place. ”

But why do some donors prefer to remain anonymous?

- Openly sharing or being recognized for a charitable estate gift may feel uncomfortable. Perhaps they have grown up in a household or come from a generation that believes talking about finances and wills is just not done. Charities need to respect those feelings and only acknowledge legacy donors with their consent.
- Some donors discuss their philanthropic goals with a professional advisor before sharing details of their will with their children or family. For this reason, they may want to keep their identity secret, often through a lawyer, until they can have a family meeting or conversation with their loved ones.
- Fear of being inundated with funding appeals causes some donors to choose not to inform a charity about their estate plans. Telling a charity about their estate plans should not result in unwanted fundraising appeals. Donors can ask to be removed from a charity's fundraising initiatives or communication list.
- Concerns about commitment may cause some individuals to remain anonymous. Donors may mistakenly worry that sharing their estate plans means that they are



Designed by: Darren Ward

“locked-in” and unable to change their minds if their life circumstances change or philanthropic priorities shift over time. This is not the case as estate plans, wills, and pledges can be changed or canceled anytime.

At Carleton University, we love to thank, celebrate and recognize our legacy donors as an integral part of our community that supports our successes now and in the future. However, if a donor wants to remain anonymous for any reason, we pledge to keep and uphold these requests.

Whether a donor wishes to have a secret identity or chooses to be part of our community of legacy donors, **their superpowers are, well... super!**

Estate Planning: A Challenging Conversation

By: Sara Hillier, TEP, MTI

Director, Estate Solutions and Partnerships - ClearEstate

Conversations about death can be awkward, if they happen at all.

Picture this scene, perhaps familiar to you: an adult daughter shifts uncomfortably as her aging mother initiates a discussion about her will, and asks if her daughter can be her estate executor.

Knowing virtually nothing about what this entails, the ever-supportive daughter nonetheless agrees enthusiastically.

Before mom can expand on the conversation, a child runs into the room, a phone rings, or some other such distraction moves the conversation away from the topic and the matter is never fully resolved.

In this scene, both family members were well-intentioned but the truth is, when mom passes, it is likely her daughter will quickly feel overwhelmed. This was most certainly not what mom intended, but thankfully it is possible to have an effective estate planning conversation with family members if certain details are covered.

Tips on Discussing Estate Settlement with Loved Ones:

1. Discuss the important responsibilities of your estate executor/trustee.

Even in the perceived simplest of cases, estate settlements are time-consuming and the fiduciary duties of an executor bring about great scrutiny. Ensure your executor is aware of the personal liability to them

and, during a time when emotions are running high, that they will need to handle unfamiliar matters and often manage the expectations of others with differing viewpoints.

2. Discuss the important elements of your estate plan and the context surrounding your decisions (to the extent appropriate).

While it is not an obligation, communicating your estate plan and the reasoning behind its key components to your loved ones in advance will help them understand and accept matters when the time comes. Anything unexpected should be covered, including: any in-kind or unequal distribution of assets; gifts to a favourite charity and the resulting charitable tax receipt; specific directions for sentimental assets such as a cottage property or personal effects; and any efficiencies and protections implemented, such as the engagement of estate professionals and/or the use of testamentary trusts.

3. Discuss major decisions your executor may face and expectations for how they will exercise their discretionary powers.

Here, you can cover the general principles you expect your executor(s) to follow



Sara Hillier

when making decisions. They must act prudently and in the best interest of your estate regardless of their personal interests. If there is more than one executor, how they are to handle disagreements should be predetermined. The duties and expectations of your attorneys for property and personal care should be covered as well.

While uncomfortable, it's important to give this topic the attention it deserves. If you don't, you'll miss an opportunity to adequately prepare your loved ones and prevent strain on your family relationships. You might all be dreading it, but a calm, compassionate discussion in advance will be a precious gift for your family when the time comes.

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How You Can Create a Student Award

Scholarships and bursaries reward exceptional academic achievement and make education possible for those with limited financial means. Donor-funded awards are extra special — students value the encouragement and trust of generous alumni, donors, and friends.

Option 1: Endowed award — permanent impact

You can create and name an endowed undergraduate award with a minimum endowed gift of \$25,000 and a graduate award with a minimum endowed gift of \$50,000. Endowments exist for the life of the university, which means your scholarship or bursary will help generations of students.

Option 2: Non-endowed award — immediate impact

You can create and name a non-endowed student award. In this option, we ask you to

make a gift of \$5,000 (\$1,000/year for five years for undergraduate students) or \$10,000 (\$2,000/year for five years for graduate students). After five years, without additional gifts, your award ends.

Terms of award (applicable to endowed and non-endowed)

You may designate your award toward a specific department or program of study. You may assign your award as a scholarship with high academic requirements or as a bursary, which has a financial need requirement.

Once your award is established, you'll be kept informed annually about your student recipient, and, whenever possible, you'll receive a personal message from the student you're helping. For more information or to learn about creating a student award, return the enclosed card or contact the Personal and Planned Giving team.

For more information, please contact:

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