



## Planning for the next generation

*By Laura Byrne Paquet, BJ/87*

“Carleton is responsible for who I am today,” says Andy Donovan, BA/88. “I virtually bleed red, black and white.” Andy’s love of Carleton is one of the many reasons he decided to further support a bursary in his parents’ name by arranging a donation in his will.

Andy was a shy student when he came to Carleton from Belleville in 1984. However, years in residence—culminating with a stint as the entertainment programmer for the Rideau River Residence Association—brought him out of his shell and enhanced his confidence. That experience also gave him the chance to meet many students who were given the chance to attend university due to the generosity of donors.

Like many families, his mother and father made sacrifices to send their kids through college and university, and Andy remembers the pride on his parents’ faces on his graduation day. Becoming a parent himself 10 years ago—of triplets—really illuminated that experience for him.

“It didn’t really dawn on me, until I had kids of my own, what that actually meant to them, what they had to sacrifice to put us all through university,” he says. “I truly appreciate the financial hardship that a lot of



Andy Donovan, BA/88 and his triplets Charlie, Peirce and Katie.

families go through, even the ones that are considered middle class.”

After the experience of arranging a charitable gift in his own will, Andy has some advice for people who may be similarly inspired to leave a legacy gift to Carleton. His number-one tip? Work closely with the planned giving team to ensure that the gift you want to leave meets your philanthropic goals and dovetails with the university’s needs. “Having access to bursaries and scholarships can really reduce the burden on students and allow them to focus on what they’re really there for—their studies,” he says.

Any student in need can apply for the bursary he is supporting. In structuring it, he

gave Carleton as much flexibility as possible, so they could put the money where it was needed most.

He also advises donors to discuss their intended gift with their families, and to talk to a lawyer and a financial planner to make sure the donation is properly structured and is the best choice financially.

The subject can be uncomfortable, “Nobody really wants to talk about their mortality,” he concedes. “However, having the discussion about estate planning doesn’t mean you’ll be giving away your money tomorrow,” he adds with a chuckle. “I’m hoping that’s not going to take place for 30, 40 years.” ♡

# Remembering Rodrigo

By Laura Byrne Paquet, BJ/87



Walter Fenlon, Rodrigo Pereira and Linda Ann Daly.

When Linda Ann Daly, BA/71, first met Brazilian Rodrigo Pereira, she had no idea how he would change her life.

In 2009, Rodrigo came to live with Linda Ann and her husband Walter Fenlon in Kingston, as a high school Rotary scholar. “We just

enjoyed his presence hugely. He was the kind of man who had a huge zest for life and wanted all the experiences of Canada that he could possibly get,” recalls Linda Ann, a member of Carleton’s Board of Governors.

With their help, he came back to Canada to study at Carleton’s Sprott School of Business, where he immersed himself in university life. “He was busy in different clubs; he was as active as he could possibly be. He represented what you hope someone who goes to university will be,” she says.

The couple were careful to make financial provisions to ensure Rodrigo could finish his studies, Linda Ann notes. “Once he was in our life, we ensured that there was money for him in our wills, should

something happen to us. He was depending on us.”

In the fall of his fourth year, Rodrigo began suffering pain in his hip. Linda Ann took him to an orthopaedic surgeon, who diagnosed him with stress. However, by early October, the pain was so severe that he withdrew from Carleton and returned to Brazil. Linda Ann and Walter paid for his health care costs, which included flying him by helicopter to a private hospital in Curitiba, where he was diagnosed with a rare cancer called Ewing sarcoma.

“Because of the experience with Rodrigo, we decided to create a fund that would offer short-term emergency assistance for international students, because not everybody has a Linda Ann and Walter,” she explains. Any international student facing a personal crisis can apply to the fund for financial aid.

Linda Ann and Walter kept in touch with Rodrigo regularly as he went through his cancer treatments. “He had spirit, he had hope, he had vigour, in as much as he was capable, right to the very, very end, but he died in August 2014,” says Linda Ann with a catch in her voice. The emergency fund they had established in his honour was renamed the International Student Emergency Fund in Memory of Rodrigo Pereira.

During his years at Carleton, Rodrigo had connected with a wide range of students and





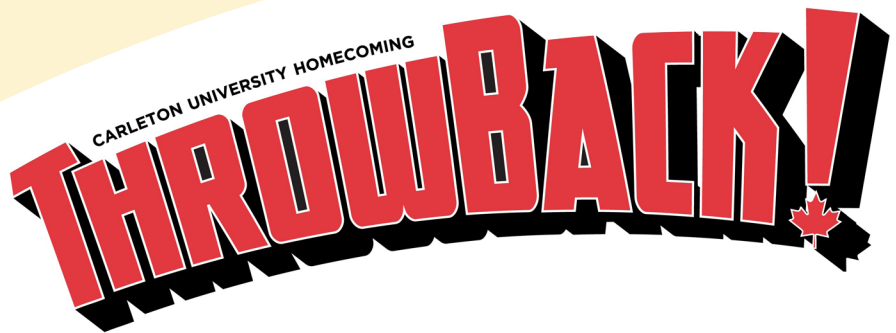
faculty members. In the fall of 2014, many of them attended a tribute to Rodrigo that Walter and Linda Ann hosted in Kingston and contributed to the emergency fund. This show of support touched them deeply. "The heart of Carleton is still very strong. It reaches out to people and it helps people," says Linda Ann.

She is happy that the fund addresses a specific need in the Carleton community that hadn't been directly met before. "I think the fund is important to raise awareness that an international student is different than a domestic student. They come from a long way away and they don't have the kind of support system that domestic students typically might have."

She and Walter are also pleased that Rodrigo's name will live on at Carleton in the name of the fund. "The fact that it is in his name made us so proud, and he was so proud to think that that this fund would be there for others." ♥



Walter Fenlon, Rodrigo Pereira and Linda Ann Daly.



## Milestone Anniversary Celebration 2018

**Saturday, September 15, 2018**

**9:30 – 11:30 a.m.**

**2nd Floor Atrium Richcraft Hall**

**(formerly River Building)**

**Carleton University**

The Milestone Anniversary Celebration is an opportunity for the university to honour alumni who are celebrating a special anniversary of their graduation. This year graduates who are celebrating their 25, 30, 35, 40, 45, 50, 55, 60 and 65th year graduation anniversaries will be recognized, as well as those who graduated 50 years ago and earlier. Anniversaries being honoured this year are the classes of 1993, 1988, 1983, 1978, 1973, 1968, 1963, 1958, 1953 and the Founders graduates from the classes of 1968 and earlier.

**For more information please contact 613-520-3636**

**<https://events.carleton.ca/milestone-anniversary-celebration-2018/>**

**“The heart of Carleton is still very strong. It reaches out to people and it helps people.”**

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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 CU is easy to do. Carleton's guide to **"Gifts by Will"** contains valuable information and suggested wording that will assist you in discussions with your lawyer. Send us the enclosed reply card today asking for **"Gifts by Will"**.

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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.



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It may prove valuable down the road.**



# My Philanthropic Philosophy

By Alastair Summerlee

I used to be the kind of person that would change the channel when one of those sequences showing kids in refugee camps would appear on television. So, in 2011, when the UN declared famine in southern Somalia and I was invited to the region to observe, I was very nervous about going. When I got there, of course, I realized that behaviour was selfish and I shifted my focus to the larger question: What do you do when you've got 750,000 people who are starving?

We were speaking with a woman who was there with her daughter, who might have been two or three years old. The child was scared at first, but after she warmed to us, she reached out to offer her very last crust of bread to another person in our observation group. That was absolutely poleaxing for me because it demonstrated that human beings have a need to share with each other. Even when you're starving as a child, the automatic thing to do is give away the very thing that was most important to you. It was a



Photo credit: Dave Chan

profound lesson from a toddler and it is a lesson that stays with me and informs my work.

If you help just one person, then tomorrow you and that person will be able to help two people. Philanthropy is a seed planted. When you give, it makes a real difference and

you don't always know what the multiplier effect will be. I see that all of the time here at Carleton. One of the things I've learned from being in this position is that students are unbelievably moved by the fact that somebody that does not know them actually wants to help them and those donors do not always need to know who is being helped either. To me, the whole concept of giving is this remarkable behaviour where you benefit much more as the giver than you do as the receiver. ♥

\* Alastair J.S. Summerlee is interim president and vice-chancellor at Carleton University.

“Philanthropy is a seed planted. When you give, it makes a real difference and you don't always know what the multiplier effect will be. I see that all of the time here at Carleton.”

# I wish

*By Holly Greatrex*

Today I do not recognize the name written before me. Helen is not a graduate, parent, staff member or volunteer. Her name is not in any of my files. I can't find any Carleton connection to her late husband either. Helen donated a gift through her will to establish a scholarship for engineering students in his memory. Googling, I think he had been the CEO of a local company but the information is too old and vague to be certain. Could they have hired talented young co-op students or Carleton graduates? So many questions. I wish I'd met Helen to learn the real connection - the real story.

We open many estate notification letters at Carleton University. It is always sad to learn that we have lost a dear friend, alumni, community member or loyal donor. But we are tasked with the honour of helping bring a person's final

philanthropic wishes to life. For us a gift by will is a deeply personal and meaningful act of generosity. I wish I could have said thank you personally.

As I read Helen's will, I think she intended to create a lasting memorial scholarship in her late husband's name. Likely, Helen had thought about a permanent endowment fund. But Helen's \$10,000 gift will support students for only 10 years before the fund is expended. I wish I could have told her that a permanent endowment requires at least \$25,000.

Helen obviously did a great deal of research before including Carleton in her will. The language used to describe the scholarship came directly from our awards website. I imagined Helen spending hours, if not days, struggling through different websites trying to find just the right

information. I wish her lawyer had called me.

Gift planning without help is usually not the best way to go. If you are planning a gift by will, especially when thinking about tribute funds, endowed scholarships or bursaries, let us be part of your planning team. We really are on your side. ♥

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ways to give!



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For more information, please contact:

**Gillian Whyte, Doug Puffer,  
or Holly Greatrex**

**Personal and Planned Giving**  
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Office: 613-520-3636

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