



A Lifelong Connection

By Laura McCaffrey

Professor Emeritus Carl McMillan discovered his passion for Russian Studies through years of living and travelling abroad. That passion would ultimately lead him to Carleton in 1968, where he would become one of the first directors of what is now known as the Institute of European, Russian, and Eurasian Studies (EURUS).

His nomadic lifestyle started early. The son of a U.S. naval officer, McMillan spent his childhood moving from one naval base to the next, in the United States and overseas. He graduated from Yale University with a B.A. and M.A. in International Relations before beginning military service in the U.S. Navy. After completing officer training, he was sent for a year of intensive Russian language training at the Navy's language school in Washington, D.C.

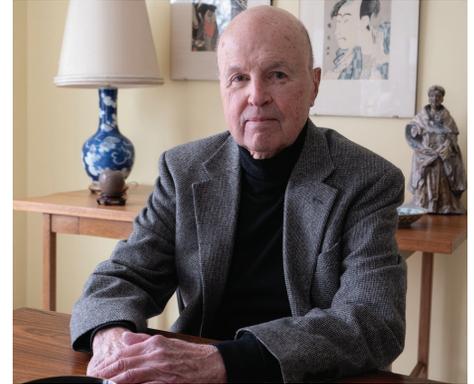
McMillan completed his military service and joined the U.S. Foreign Service, where he worked first on the Philippine desk in the State Department. Later, he was assigned postings in the U.S. embassies in Manila and Moscow—before which he completed a year of advanced Russian language and area studies in Germany. Deciding

to make use of his training and experience as an academic specialist, he enrolled in the Ph.D. in Economics program at Johns Hopkins and wrote his Ph.D. dissertation on the Soviet economy.

As McMillan considered his employment options post-graduation, he was drawn to Carleton. "Carleton appealed to me for many reasons," he recalls. "But Carleton's interdisciplinary undergraduate honors program in what was then called 'Soviet and East Europeans Studies' is what brought me to Carleton in the late 1960s." In 1971, the program became an institute—which was later renamed 'EURUS'—and an MA program was added. McMillan served as the institute's director for two terms.

Dr. McMillan retired after 30 years at Carleton. He recalls his time fondly, saying: "Teaching at Carleton was a gift. It enriched my life in so many ways, not only professionally but in terms of lasting friendships."

Now, 50 years later, his affinity for Carleton remains. In 2018, after having committed to a gift in his will years prior, he decided to establish the McMillan Chair in Russian



Carl McMillan

Studies, creating an endowed Chair that will support teaching and research excellence within EURUS.

When asked about his reasons for supporting EURUS, McMillan is pensive. "I agreed in the mid-1980s to return from an early retirement and serve as acting director of the institute. We were battling university cutbacks and interdisciplinary programs in particular were being threatened—I was literally fighting for the survival of the institute. While EURUS is thriving now, it is nice to know there is an endowed gift in place that can provide support in tough times. I hope the Chair will contribute to the long-term growth and success of the institute."

Professor McMillan worked closely with Carleton's planned giving team to establish the Chair. "It couldn't have been easier," he says of the process. "The team gave me great advice about giving options that made the most sense for me." ♥

And the Estate Goes to...

By Anna Alizadeh, JD, TEP

People often wonder who inherits when a person passes away without a will.

In Ontario, the distribution of an estate without a will is governed by the rules set out in the *Succession Law Reform Act*. The Act provides for a list of individuals (i.e. no charities), in hierarchical order, who the law presumes the deceased would have wanted to leave money to. For example:

- if you are married and have no children, your spouse inherits your entire estate;
- if you are married with children, your spouse will inherit the first \$200,000 of your assets and the remainder (if any) is divided among your spouse and children;
- if you are not married and have no children, your estate is distributed to your closest living blood relatives (parents would take priority then your siblings. If your siblings are not alive, your nieces and nephews, etc.); and
- if you have no next of kin, the estate will revert to the Crown. However, this is quite rare.

Common-law spouses have no entitlement to an estate under the intestacy rules. Even though the law provides a road-map as to who should receive an intestate person's estate, an unhappy family member, common-law spouse, or a multitude of other persons can nevertheless come after the estate and fight for a piece of the pie. It is always best to make a will. High profile celebrities who have died intestate serve as cautionary tales for why you should make a will.

For example, Prince died without a will on April 21, 2016. He left behind an estate worth an estimated \$200 million. It took one year to determine who the beneficiaries of Prince's estate are (at one point, 29 people made a claim for a share of his estate). Ultimately, a judge declared that Prince's six siblings were the heirs of his estate. Even still, further disputes continue and could completely deplete the estate.

When Billie Holiday died, she had \$0.70 in the bank



Anna Alizadeh

and \$750 strapped to her leg. Unfortunately, she too died without a will. Her entire estate and royalties therefore passed to her estranged husband, Louis McKay. While Ms. Holiday's estate was not worth much at the time of her death, her estate continues to earn income after her death. After Mr. McKay's death, his widow also received a share of Ms. Holiday's royalties through Mr. McKay's estate. Certainly, Ms. Holiday could not have intended to benefit her estranged husband nor his widow.

Without a will your estate may pass to a person you never intended to inherit from your estate. Moreover, loved ones may spend significant time, money and emotional energy to decipher your wishes and administer your estate. Why leave it to the law - make a will. ♡

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To endow, or not to endow... interesting question

By Holly Greatrex, CFRE

Endowment and expendable funds are both exceptional ways to support your charity of choice. It is important to understand the benefits and boundaries of each gifting method in order to make the right decision for you.

Expendable donations provide an immediate source of revenue. Your gift will have an instant impact on charitable activities because the money is available right away. Terms of reference may also be arranged to disperse a set portion until the fund is exhausted with defined start and end dates. In university settings, construction projects and urgent purposes are best funded with these types of gift.

Gifts for endowment never stop giving. Endowed gifts allow you to permanently fund areas in which you have a special interest and provide a meaningful and long-lasting legacy. Endowment funds provide stable and consistent funding year after year. The original capital is invested to provide income and a modest rate of growth “in perpetuity” so the impact of an endowed gift is felt over time. Recurring needs like scholarships and bursaries are best funded with endowed gifts.

Both types of gifts can bear the name of the donor as long as minimum gift amounts are met. Endowed funds and expendable gifts are wonderful, enduring tributes to your life



or the life of someone you care about, especially when they are named.

Perpetual funding or immediate impact, only

you can decide which giving method meets your philanthropic goals. ▼

Encouraging Philanthropy

By Doug Puffer

The Department of University Advancement is in the business of encouraging philanthropy. We provide information and opportunities for our supporters who are alumni, students, staff, faculty, retirees, friends and the global community who believe we are on a journey towards excellence, continually improving the value of a Carleton degree.

Most of those people who we call donors and volunteers, also support other good causes in their home communities and more globally. Recent surveys of donors tell us that the vast majority of Carleton alumni are socially engaged with a broad spectrum of charitable organizations. This is a huge source of pride for the university community and it clearly embodies the ethos that we are all **here for good**.

The information that we make available through newsletters, brochures and at planforgood.carleton.ca is transferable for most any Canadian charity. As a publicly funded educational institution, we believe that we have a responsibility to disseminate knowledge as broadly as we can within the limits of our resources. We do our very best to keep up to date and to reflect changes in policies which regulate the nonprofit sector. So if you are like many others who support Carleton University and other causes, please take advantage. ▼

Supporting Future Entrepreneurs

By Laura Byrne Paquet, BJ/87

Between them, husband and wife Dave Roberts and Patricia Dionne run three Ottawa businesses: an esthetics studio, a hot-air balloon company and a sports bar. So perhaps it's not surprising that when they decided to create a bursary at Carleton University in their wills, they focused on supporting future entrepreneurs.

The funding will go to a second-year student in the Sprott School of Business from the National Capital region. The couple pinpointed second-year students because they felt that, by second year, students would be more certain of their educational path.

"It's not about us and our legacy. It's about others and having a continuing impact on somebody that may need financial assistance: somebody that can demonstrate an entrepreneurial spirit, somebody that maybe comes from a lower income household... somebody that may continue to employ people in our community," says Roberts.

“The pair are eager to give Carleton students opportunities they themselves didn't have.”



Dave Roberts and Patricia Dionne.

Perhaps more surprising than the focus of their gift is the fact that the couple chose Carleton, as they are not alumni. "We have no connection with Carleton at all," says Roberts.

So what attracted them? The Sprott School of Business and its solid reputation. "We're really proud to have that school in our own city," says Dionne.

Their accountant had set up a planned gift with Carleton, and a friend had also mentioned the idea to them. The couple have no children together and were thinking about ways to ensure that whatever is eventually left in their estate will go to a cause that reflects their interests and values.

Both Dionne and Roberts say it has been easy to work with the university to hone their ideas for the gift. "They've been really accommodating," Roberts says.

The pair are eager to give Carleton students opportunities they themselves didn't have. "We've both worked really hard our whole lives," says Roberts, who was an OC Transpo bus driver and a City of Ottawa firefighter before becoming an entrepreneur. "I never finished high school, so maybe one of the biggest mistakes that I personally made was not completing post-secondary education."

One unexpected side benefit to working with Carleton has been having a reason to visit the campus. "Sometimes when you look at youth, you say, 'Oh my God, where is this world going to?'" says Dionne. "And we go to Carleton, and there's so many great, intelligent, hard-working young people that we say, 'Oh, there's a chance!'" ♡

Estate Planning Questionnaire

Let's face it, no one wants to think about his or her own mortality but estate planning is an important part of life. Answer each statement **True** or **False** and then total your score at the end of the questionnaire.

TRUE	FALSE	QUESTION
0 points	20 points	I have a will.
0 points	5 points	My marital status has not changed since my last will review.
0 points	5 points	No children or grandchildren have been born since my last will review.
0 points	2 points	The person I named as executor is still willing and able to perform this role.
0 points	2 points	My financial records are up to date and accessible.
0 points	2 points	I have discussed my estate plans with those close to me.
0 points	5 points	My family and friends have been provided for in my will.
0 points	2 points	I am satisfied with the charitable gifts included in my will.
0 points	5 points	My spouse, partner, and/or children will not need support managing inherited assets.
0 points	2 points	I have not given away or sold property I intended to gift through my will.
0-10 points: Congratulations! You received a passing grade in estate readiness.		
10-19 points: You may want to review your estate plans to ensure they still reflect your wishes.		
20-50 points: Take time now to review or begin your estate plans with guidance from a professional.		



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