

Grateful students • New VP Advancement • White Rose Legacy Circle • Leave your mark • York highlights

RUSSELL SMITH TIPS HAT TO THE GREAT START HE RECEIVED FROM GLENDON

In 1964, York was in its infancy. Yet from the very beginning, it was known for horizon-expanding education in an intimate setting.

This was exactly what Russell Smith (BA '67) was looking for when he accepted a spot at Glendon College.

Murray G. Ross, York's first President, acted as Russell's faculty advisor and inspired him to discover what would become his life-long mission: to enhance the value offered to society by Canada's public servants.

For 30 years, that's just what Russell did, managing human resources programs of several government ministries. His last position was Executive Services Consultant with the Ontario Management Board Secretariat's Centre for Leadership.

Now retired, Russell has devised a way for his work to continue. He has decided to leave a bequest to York, which will give some of the most promising future leaders the knowledge and experience they need to create sound and progressive public policy.

"I plan to leave a percentage of the residue of my estate to create the *Russell D. Smith Scholarship in Public and International Affairs*," Russell told York recently.

"I'm doing so in appreciation of the good general grounding I got from Glendon, which offered excellent education in a small community setting that really felt like family.

"When I decided on graduate studies to better prepare me for a career in public service, sadly York University didn't have such a Master's program at that time, so I finished my studies at another University.

"I would have preferred to stay at Glendon, so I'm thrilled York students can now take Glendon's outstanding Master's program in Public and International Affairs.



Russell D. Smith, one of Glendon's first graduates, says, "Glendon was an important starting point in preparing me for my public service career. To allow Glendon to help others like me to do the same, I'm honouring York University with a bequest in my will to fund scholarships for promising future students of Glendon College's Master's program in Public and International Affairs."

"My bequest will be endowed, and its annual income will become an investment in financially challenged students who show great promise in public service. Today's university education costs are much, much greater than they were in my day, and it would be a shame for someone to have to stop their studies because of a lack of money.

"I encourage anyone who is lucky enough to have funds to leave as a legacy beyond immediate family to consider making a bequest to acknowledge those institutions and agencies that meant something to them during their lifetime."

"It's important to help people who need a helping hand." - Russell D. Smith, BA '67

ESTEEMED YORK PROFESSOR'S GENEROSITY WILL ALLOW STUDENTS TO REALIZE THEIR DREAMS

For more than 40 years at York University, Dr. Virginia Rock inspired and motivated thousands of students with her passionate teaching style. She has found a way to allow her inspiration to live on forever.



Dr. Virginia Rock, former York University English professor, program director and Master of Stong College, is making a legacy gift of life insurance to fund scholarships.

Now 88 years old, Dr. Rock has donated an insurance policy to York. By making York the policy's owner, she gets charitable tax receipts for the premiums she pays. The multiplying power of life insurance will make the policy's proceeds much greater than the sum of her premiums.

On Dr. Rock's request, the proceeds will be endowed to generate an annual Virginia Rock Award in Women's Studies, a graduate program she helped create.

Dr. Rock has personal knowledge of how great an impact awards can have on students. "I cannot imagine what kind of life I would have had, had I not been helped financially during my own university studies," said Dr. Rock. This financial support allowed her to attain her dream career – teaching.

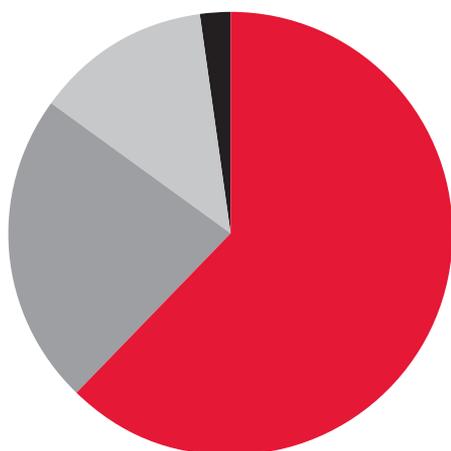
She began teaching English at York in 1965. She remembers that time fondly. "Those early heady days are unforgettable. There was the excitement of seeing a campus emerge from fields; the pleasure of introducing new students to the delights of reading and discussing literature; and the camaraderie of talking with colleagues from many departments over a glass of wine in Founders common room."

In 1969, Dr. Rock's quest for new challenges led her to be named the first Master of Stong College. In 1982, she accepted the challenging role of director of the graduate English program.

Upon her retirement in 1992, York welcomed her continued participation. She joined a team developing the first graduate Women's Studies program in Canada. She worked on committees, and for years directed and taught a core course.

"Because this area of study is very important to me, I chose to leave a legacy to support Women's Studies students. It's very tough for students to afford university these days – they need help. When you want to leave something behind that will live on and benefit others, investing in young people is the way to go."

"After being happily involved with York University for more than 40 years, I resolved to find a way to express my appreciation." - Dr. Virginia Rock



REALIZED ESTATE GIFT DESIGNATION

■ Student Awards	62%
■ Libraries	23%
■ Academic Programs and Talent	13%
■ Other	2%

MESSAGE FROM VP ADVANCEMENT, JEFF O'HAGAN



Jeff O'Hagan, vice-president advancement, York University

Legacy giving plays an important role in the life of a university. These gifts provide scholarships, endowed chairs, capital improvements and outstanding academic programs that define our reputation for excellence.

In the past 25 years, York has benefited tremendously from \$14.6 million in realized gifts, including bequests, life insurance policies, retirement plan accumulations, securities and gifts-in-kind. With an additional \$10 million pledged in future gifts, legacy giving is contributing to our long term growth and success.

By leaving York in your estate plan, you too can make a difference. Many of the giving options offer significant tax advantages, allowing you to have a lasting impact on the future of York and our students, while enjoying financial benefits today. Your generosity will also earn you membership in our exclusive *White Rose Legacy Circle*.

I hope you enjoy this latest edition of York U Legacies and that the stories you find in this newsletter will inspire you to join our mission to educate tomorrow's leaders. Working together, we can plant the seeds for the future success of our students and faculty for years to come.

Sincerely,

WHITE ROSE LEGACY CIRCLE

HONOURING YOUR INTENTIONS

If you are thinking about or have made a provision in your estate plans for York, please inform us of your intentions, so we may thank you for your generosity, ensure that your wishes are honoured, and allow York to plan for its future. You will also become a Founding Member of The *White Rose Legacy Circle*. Members have the option of being included on York's Legacy donor recognition list, and receive invitations to special events, including an inaugural reception on

June 20, 2012. A formal invitation will be mailed to all legacy donors closer to the event date.

The *White Rose Legacy Circle* is named in honour of the white rose of York which was symbolically planted on York's campus in 1961 by Lord James of Rusholme, the vice-chancellor designate of the University of York in England, following the installation of York's first chancellor, Wilfred Curtis.

WHITE ROSE LEGACY CIRCLE DONORS

York University gratefully recognizes the following individuals who have thoughtfully declared their intention to include a legacy gift for the University in their estate's charitable giving plans. We also wish to thank those donors who have chosen to remain anonymous.

Anonymous Donors

C. Jane Banfield
Linda Briskin (MA '77, PhD '86)
Karen Cassel
Brian Clow (BA '67, MA '89)
M. Barrie and Anne Coukell
Larry Davies (BA '68) and Denise Loader
Terrie-Lynne Devonish (BA '92, LLB '95)
William A. Dimma (MBA '69, LLD '98)
Robert (BA '67) and Vicky (MA '76) Drummond
J. Bruce Dugelby
Mircea, Christine* and Alexandru* Dumitriu
Joanne Goldberg Weigen (BA '89)
Tim Haunn (BA '82)
Freia and John A. Heber
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June Kingshott (BA '68)
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Judith Rudakoff and Myles Warren
Virginia Sawyer
Russell D. Smith (BA '67)
Linda Starodub (MES '79, MBA '81)
L. Deborah Sword (MES '93)
W. Mark Treadwell
Albert Tucker (BARR '56)
Donald P. Walker (BA '72)
Mary F. Williamson
Joan L. Wood (BA '75)

If you included a legacy gift for York University in your estate plans, but do not see your name listed above, or if your name is displayed incorrectly, please contact us at 416-650-8210 or legacy@yorku.ca. An asterisk (*) following a name indicates that the donor has passed away subsequent to making his or her donation.

LEAVE YOUR MARK THROUGH A MEANINGFUL LEGACY GIFT - BY BRAD OFFMAN

When making plans for how your estate will be handled, you should keep in mind these easy and effective ways to support your favourite charities. This article covers three of the most popular ways to give through your estate: **bequests, gifts of life insurance and donations of RRIFs/RRSPs.**

Please discuss your options with your financial and legal advisors to ensure you choose the type of donations that are most appropriate for you.

BEQUESTS: DONATIONS LEFT IN YOUR WILL

Bequests are by far the most popular form of deferred charitable donations in Canada. In the year of your death, you can donate up to 100% of your net income, using the resulting charitable tax receipts to provide tax relief to your estate, making bequests a powerful estate planning tool.

To name a charity as an estate beneficiary in your will, you can either insert a specific donation amount, or make a residual gift.

Bequests of a specific amount/item of value

You can specify that your charity receives either a specific monetary amount or a specific item of value, like a piece of property. Sample wording you can use in your will to give in this way would be:

"I give, devise and bequeath the sum of \$10,000 Canadian dollars to the <Official Legal Name of Charity>, <Charitable/business registration #>, at <Full Mailing Address>." Including this detailed information will ensure there is no doubt about which charity you want your donation to support.

Bequests of residual amounts

A residual donation can represent all or a percentage of the value remaining in your estate after all specific bequests and personal effects are dispersed, and all debts and administrative expenses are paid. Sample wording would be:

"I give, devise and bequeath all/XX% of the residue of my estate to the <Official Legal Name of Charity>, <Charitable/business registration #>, at <Full Mailing Address>."

If you wish to direct your gift to a specific purpose, such as establishing a named award or supporting a specific program, it is advisable to speak with your charitable beneficiaries in advance to ensure your wishes can be fulfilled.

GIFTS OF LIFE INSURANCE: MULTIPLY YOUR GENEROSITY

By assigning your favourite charity to be the owner or beneficiary of a new or existing life insurance policy, you can make a donation that is bigger than you ever thought possible. There are also significant tax advantages to giving in this way.

You can choose to set up your policy in one of two ways:

- a) By making your charity the owner and beneficiary of a new or existing whole life insurance policy, you receive tax receipts for all of the premiums you pay, providing immediate tax relief. You will not get a receipt for the death benefit, since the charity owns the policy. When gifting existing policies, you should also receive a tax receipt for the policy's fair market value.
- b) By naming your charity as the beneficiary (not owner) of your new or existing policy, you are free to change the beneficiary if your circumstances change, but because of this, you cannot receive tax receipts for your premium payments or a policy's net value. However, your estate will receive a tax receipt for the full death benefit, which can bring about significant and beneficial tax savings.

There are many ways you can use insurance to multiply the gift you can make to your charities, so you should discuss your options with a trusted insurance professional.

DONATIONS OF RRSPs OR RRIFs

When an RRIF and RRSP is cashed in (either during your life, or upon your death), the fair market value of the withdrawal is immediately taken into income at full marginal rates.

However, you can usually offset the amount of taxes you have to pay on this income by donating all or a portion of what remains in your retirement plan when you pass on.

One easy way to take advantage of this tax benefit – and support your favourite charity – is to change the beneficiary of your retirement funds to your charity. Simply contact your RRSP or RRIF administrator to request this change. In most cases it is also possible to name a charity as a beneficiary of a portion of your plan or as a contingent beneficiary who would receive the proceeds in the event that the named beneficiary(ies) predecease you. *Note that the rules differ in Quebec so it is important to contact your plan administrator for details.*



Brad Offman is Vice President of Strategic Philanthropy at Mackenzie Financial Corporation and Managing Director of the Mackenzie Charitable Giving Fund. Brad holds an MBA and MA from the University of Toronto and a BA Hons. from McGill.

AWARD ALLOWED STUDENT TO GET THE MOST FROM HER YORK EDUCATION

Heather Marr (B.A. '08) was an ideal York student. Her passion for her studies translated into great grades. In addition, she chose to get the most of her university experience by taking on extra-curricular activities that enhanced university life for hundreds of other students.

On looking back, Heather says, "I loved my four years at York. One of the reasons I had such a fantastic time was because I was involved in the York community. I put a lot of volunteer time into keeping programs alive at York, and wouldn't have been able to do so had I not been a Virginia Rock Award recipient."

The Virginia Rock Award rewards top students actively contributing to the Stong College community who are in financial need. It was established to permanently commemorate and honour York's first Master of Stong College. "I think it's valuable to have scholarships that not only push students to achieve academic success, but to also be active in the community," says Heather.

Alongside Heather's studies of kinesiology and sports coaching, administration and psychology, she won medals in extra-curricular sports. She also took community work seriously,



York grad Heather Marr says, "Because I was a Virginia Rock Award recipient, I had the time to be very involved in the York community."

acting as a Stong night porter and house programmer. As a don in Calumet, she was in charge of college programming, organizing activities geared towards social justice and diversity, and fun activities that helped students shake off the stress of their studies.

Today, Heather teaches Physical Education, Health and Careers at Fort Nelson Secondary School in B.C., and often reminds her students of the great value they will get from playing an active role in their community.

SCHOLARSHIP RECIPIENT RAYMOND PEART PAYS IT FORWARD



PhD student Raymond Peart recognizes that if he had not received a scholarship, achieving his goal of helping children who can't help themselves would be much more difficult. His motto: Compassion is wisdom.

Raymond Peart (B.F.A. '07, M.Ed. '10), a York University PhD student, received a Vernon Oliver Stong Graduate Scholarship in Education. This outstanding and considerate York scholar has dedicated his life to paying it forward.

"This award has given me the opportunity to continue to work towards providing for those who cannot provide for themselves," explains Raymond. A certified York tutor, Raymond has worked for five years at Project ADVANCE, a six-week summer institute that prepares students with specific learning disabilities for success in their university studies.

Raymond's doctoral work focuses on bringing an ethical and compassionate perspective to education, with the goal of building a legacy of compassion. He is putting this philosophy into action in an after school program of his own creation, working with vulnerable elementary school students in Toronto's Jane-Finch community, an ethnically diverse high-density neighbourhood struggling with high levels of poverty and social problems. Raymond's long term goals are to build a private school for the

poor and teach at university.

"My feeling on receiving my scholarship is gratitude to Mr. Stong, whose generosity I am carrying forward. I also feel humility and a renewed determination that has given me the confidence to persevere," says Raymond. "If I did not receive this award, I anticipate that the path toward my PhD and my goal of building a future for children who cannot help themselves would have been significantly more difficult."

VERNON STONG'S LEGACY LIVES ON AT YORK

York University's Keele Campus and neighbouring Black Creek Pioneer Village stand on what was once the 100-acre Stong Family farm. Before his passing in 2005, Vernon Oliver Stong, generous York benefactor, made York University the main beneficiary of his will with the intent to establish endowed scholarships for graduate students in science, education, and German and European Studies. The bequest came on top of a previous gift for a scholarship.



Although he never attended York University as a student, Vernon Stong was born in the 1937 Georgian-style red brick house that still stands on the north-east corner of York's Keele campus.

YORK HIGHLIGHTS

SIGNS OF GROWTH ALL OVER YORK



Construction on the **Toronto-York Spadina subway extension** is well underway at the two on-campus stations: York University and Steeles West. When the \$2.6-billion project is complete in late 2015, it will vastly improve the daily commute for thousands of people and integrate York more fully into its surrounding communities.

Osgoode Hall Law School kicked off this school year in a newly-renovated building. The **\$50-million renovation and expansion** took place over the past two years and was made possible thanks to generous donations to the Building Osgoode Campaign, as well as federal and provincial government funding.

The state-of-the-art Life Sciences Building is set to open in spring 2012. It will showcase York's world-class health science researchers, and will support increased enrolments in science and health. **Glendon Campus** will also be enhanced with its **Centre of Excellence for French-Language and Bilingual Postsecondary Education**, made possible by a \$20-million government investment. This new facility will provide our French-speaking students with a superior educational experience necessary for the changing economic and political world.

President and Vice-Chancellor Mamdouh Shoukri recently announced a \$25-million transformative donation from Pierre Lassonde, chairman of the Franco-Nevada Corporation, for an **expanded School of Engineering** at York. This is in addition to the \$50-million from the provincial government. "This transformative donation will allow us to create a truly unique engineering program that will redefine engineering for the 21st century," said Dr. Shoukri.



HSBC Bank Canada invested in York's Faculty of Environmental Studies and environmental scholarship in Canada with a **\$1-million donation to support undergraduate students** — the single largest corporate endowment supporting Environmental Studies Awards in Canada. More than 15 students will receive full tuition awards each year.

FOUNDATION JOINS YORK UNIVERSITY

The York University Foundation became a part of York's new Division of Advancement last spring. Comprising Alumni Relations, Development and Advancement Services, the new Division is chiefly responsible for building York's relationships with its alumni, donor and volunteer communities.

UPCOMING EVENTS:

- Feb. 12, 2012 York Circle Prestigious Performance: Caesar and Cleopatra
- Feb. 18, 2012 York Circle Lecture & Lunch
- Apr. 1, 2012 York Circle Prestigious Performance: The Magic Flute
- Apr. 28, 2012 York Circle Lecture & Lunch
- Jun. 6, 2012 Kenaidan-York University Chair's Cup Golf Tournament
- Jun. 20, 2012 White Rose Legacy Circle's Inaugural Special Event

York Circle is a free series of performances and lectures open to the public.

www.yorku.ca/alumni/events

For more information, please fill out the enclosed reply card, or contact Lisa Gleva, Director of Principal Gifts and University Development

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