

FINANCIAL PLANNER



Making it personal



Daniel R. Woolf, Artsci'80, Principal and Vice-Chancellor

Robert Sutherland wasn't the first Queen's alumnus to give a gift to his alma mater, but his \$12,000 bequest cemented his status as a legendary benefactor for a couple of reasons.

First, in 1878, when he gave his gift, \$12,000 was enough to cover the university's entire operating budget for the year. The money was vitally important, since Queen's was in the midst of a financial crisis and in danger of being annexed by the University of Toronto.

Second, the gift – the first major bequest in Queen's history – set a standard for planned philanthropy that remains in effect today. The decade-long *Initiative Campaign*, which wrapped up earlier this year, included almost \$70 million in planned gifts of all sizes, supporting such high-profile projects as the Queen's Centre and the University Avenue restoration.

The first known student of colour at a Canadian university, Mr. Sutherland gave his gift in gratitude to the school that accepted him when others wouldn't. Gratitude is certainly a motivator for planned giving, but it isn't not the only one. As the stories that follow will show you, planned gifts can be as unique as the people who give them.

When Queen's Principal Daniel Woolf (Artsci'80) proffers words of wisdom to newly-minted graduates, he doesn't always borrow the musings of philosophers or world leaders. Instead, he quotes a John Lennon lyric, reminding convocation audiences that "life is what happens to you while you're busy making other plans."

Principal Woolf had other plans one morning in 2015, when his cell phone rang in a Toronto hotel

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hallway. "I was on the ninth floor of the Fairmont," he remembers, "literally coming out of the room with my luggage, when my assistant called and said 'I have a Mr. Schulich on the phone for you.'"

That unexpected phone call would prove a pivotal moment for the Principal, one that would pave the way for his legacy to Queen's and push the boundaries that define what a legacy can be for all of us.

The Mr. Schulich in question, of course, was Seymour Schulich, the Toronto-based philanthropist who has given more than \$350 million to hospitals and universities in Canada, the U.S., and Israel. Since 2012, he has provided full scholarships to 250 students as part of the Schulich Leader Scholarship program to ensure that gifted students have an opportunity to make a difference in the STEM disciplines. Queen's, however, had yet to earn his support.

Principal Woolf had written to him several months earlier to inquire about a possible investment in Queen's. His follow-up email went unanswered – until that phone call.

"We were on the phone for an hour and a half, chatting about people we knew in common,"

Principal Woolf recalls. Almost casually, Mr. Schulich inquired into the Principal's field of study. Upon learning that it was 16th and 17th-century British history, the philanthropist remarked that he had a book collection in that area.

"That's funny," Principal Woolf replied, "so do I." The two compared notes and quickly realized that their collections complemented each other. Knowing that his children wouldn't necessarily be interested in a rare book collection, Mr. Schulich offered his books to Queen's. He then proposed that the Principal do the same, and that they pool their collections into one impressive joint gift.

"I figured I could do with a pruning of my collection," Principal Woolf says. "There were many books that I had already written about in my scholarly work, or that I'm not likely to work on."

While the Principal's contribution to the collection is numerically the larger of the two, he says Mr. Schulich's books are much rarer and more valuable. "He had, for example, an early printed edition of Higden's *Polychronicon*, printed by Caxton," Principal Woolf says. "That's way out of my ballpark."

The prospect of pairing his volumes with Mr. Schulich's rarer titles is one that Principal Woolf found

especially enticing. "By the time we're done building this, I don't think there will be a better collection outside of the Ivy League universities and the Folger Shakespeare Library in North America," he says, "certainly not of historical books from the period." (The collection boasts more than 400 titles. Mr. Schulich's contribution also included \$1 million to help build and preserve the collection and make it available to students and researchers, both at Queen's and beyond.)

While a collection of this magnitude and quality is a legacy worthy of any historian, the fact that the Principal's name sits on the plaque alongside the legendary philanthropist's is equally impressive.

"Mr. Schulich is someone who does his homework," says Principal Woolf. "He did his research and learned that I had done a fair bit of work in this field, and he

saw a benefit in having both our names on the collection. From my perspective, it's a great honour to be associated with a philanthropist of his reputation."

It is an honour that wouldn't have happened had the Principal followed his original plan and deferred his donation until the end of his career – or possibly the end of

his life. But the principal who quotes John Lennon in his convocation speech has a soft spot for those moments when life takes an unexpected turn, and he realized that the opportunity that appeared before him was too good to pass up.

"As a historian getting close to the end of my career, I'm acutely conscious of the fact that life is short and people like to leave legacies," he says. "We all do that in different ways. My life has been devoted to the scholarly enterprise, particularly at Queen's, so it is nice that after I'm long gone there will be some recollection that I was here. I can't think of a better form for that to take than the books."

As a member of the largest generation in human history, Principal Woolf understands the impact the Baby Boom has had on every institution it has touched. And as the Boomers spend more time thinking about leaving a legacy, they are changing the very definition of that word.

Today there are virtually no limits on what a legacy can be. Whether it be books from a scholarly collection or funds to support a program or field of study that was important to you, your legacy can be – and should be – a reflection of your experiences, your passions, your life. What will yours look like?

"I'm acutely conscious of the fact that people like to leave legacies. We all do that in different ways."

Honouring the past, safeguarding the future

For David Russell (MA'70), creating the fund that bears his name is his way of saying thank you to Queen's Department of History for helping launch him on a distinguished career as an archivist.

After completing his master's degree at Queen's under the guidance of Donald Swainson ("a lovely man, he knew what had to be done to get a thesis written and defended"), Russell joined the Ontario Archives in 1969, ultimately becoming supervisor of the private manuscripts section. In 1977, he was appointed to the National Archival Appraisal Board, the body that appraises records donated to various archives and museums across Canada. Russell became the Regional Director of the National Capital Region and served as chairman of the board's sessions at Library and Archives Canada from 1984 until retiring in 2014. He continues to serve as a board member when called upon.

The idea behind The David Russell Fund for the Department of History is to give the department money that can be used anyway it wants. "Teaching, research, books, bursaries, bringing in a speaker, I didn't put any



David Russell (MA'70)

ties on it." As well as endowing his fund, he will be donating money to it annually and has made it the sole beneficiary of his estate. Russell has also donated to Queen's Library a beautiful and unique, hand-written version of the King James Bible created by his great-grandfather Hugh Russell over the course of 23 years.

"I was very honoured to come to Queen's – I really was. It always had an aura – I think it still does."

Multifaceted commitment

People often kid Sue Bates (Artsci'91) that she bleeds "tricolour." She laughs about it, but the President of the Queen's University Alumni Association (QUAA) has a connection to the school that reaches far back, as she puts it, "to before day one" – her parents met at Queen's. Bates' mother, "loved Queen's, loved the Gaels." It is in memory of her mother, Katherine Bates (Arts'60), that Bates plans to donate to Queen's in her will.



Sue Bates (Artsci'91)

Upon graduation in 1991, Bates moved to Scotland where she acted as a Queen's alumni contact for several years. She then went on to the Bahamas, followed by the Turk and Caicos Islands, where she continued to play a part in the local alumni association. ("Just five of us," she laughs, "it wasn't very formal."). After moving back to Kingston 11 years ago, Bates became even more involved, serving as president of the Kingston Branch of the QUAA, and as a university counsellor, devoting up to fifteen hours a week to Queen's. Today, she is very honoured to be President of the QUAA, serving the entire Queen's alumni community across the globe. "Basically, if Queen's asks, the answer is always yes."

Bates also chooses to support Queen's financially. She supports the QUAA's Special Projects Fund, and the Chaplain's Fund ("for kids in need who have nowhere else to turn") among many other areas of the university. And of course, there is her planned legacy in commemoration of her mother, Katherine. "Queen's has given me so much. When I thought about where my bequest should go, there wasn't any question."

A passport to her future

In her time as a foreign service officer, Kathryn Aleong (Artsci'81) has covered a lot of territory, at home and abroad. Most recently her career has taken her to Halifax, where she is currently Regional Director and Senior Trade Commissioner for the Atlantic Region, Global Affairs Canada.

Perhaps it's not surprising that a woman who has covered so much territory studied geography. Arriving in Kingston from her native Trinidad in 1977, Aleong soon discovered her subject. "In first year, I had two great professors, one in geography and one in history. I just remember thinking that I could probably do more with a geography degree, so I went with that as my major. I just found fascinating the many aspects of human life on which geography touched."

A regular contributor to both the Department of Geography and the International Student Centre, Aleong recently decided to establish an endowment fund for geography: The Kathryn Aleong Bursary in Geography. These bursaries will be awarded on the basis of demonstrated financial need to students in second, third or fourth year of an honours degree in the department. In addition to the initial amount



Kathryn Aleong (Artsci'81)

establishing the endowment, she plans to continue to top up the capital with donations and ultimately with a gift in her will.

"I wanted to do something that would help some students make ends meet and thus be able to complete their degrees. My degree was the start of my adventures and led to my career in Canada's Foreign Service."

Championing women's hockey

Matt Holmberg (LAW'97) has helped make the Queen's women's hockey team one of the most successful in Ontario. In his seven years as head coach, the team has finished in the top 4 in Ontario University Athletics (OUA) women's hockey each season, clinched two OUA championships, and



Matt Holmberg (LAW'97)

earned a bronze in the 2012-13 Canadian Interuniversity Sport Championships.

Holmberg's support for the team isn't limited to his time behind the bench. He and his wife, Kristin Muszynski (Artsci'02, LAW'05) are also annual donors to the Women's Hockey Booster Club. As well, recently he has made provisions to support women's hockey in the future, via a life insurance policy naming the team as a beneficiary.

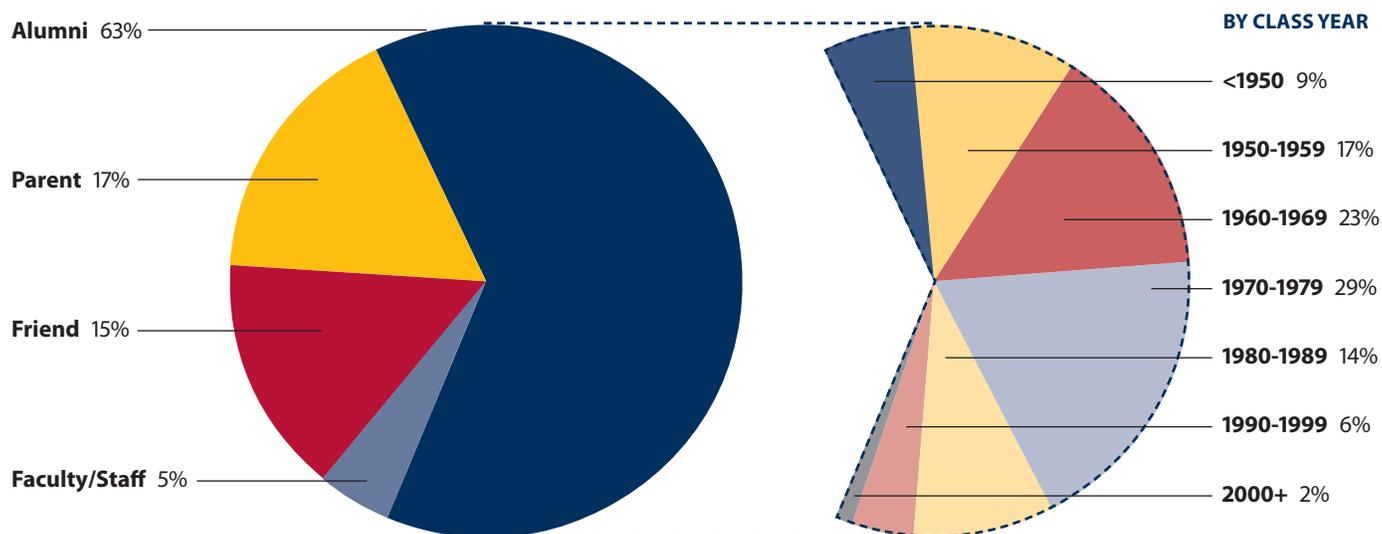
Arriving in Kingston in 1994 to study law, Holmberg "fell in love with Queen's." After briefly practicing law in his native Pembroke, he returned to Kingston in 2002. Long interested in coaching, when offered the chance to work with the women's team in 2006, he jumped at it. He became head coach in 2009. In 2011, "Queen's made my position full-time, and I put the law to the side."

"I'm constantly impressed by the effort and time that these remarkable young women put in. I want to help student-athletes, not only through coaching but financially as well. Just a few dollars a month will make a significant contribution towards Queen's women's hockey after I'm gone."

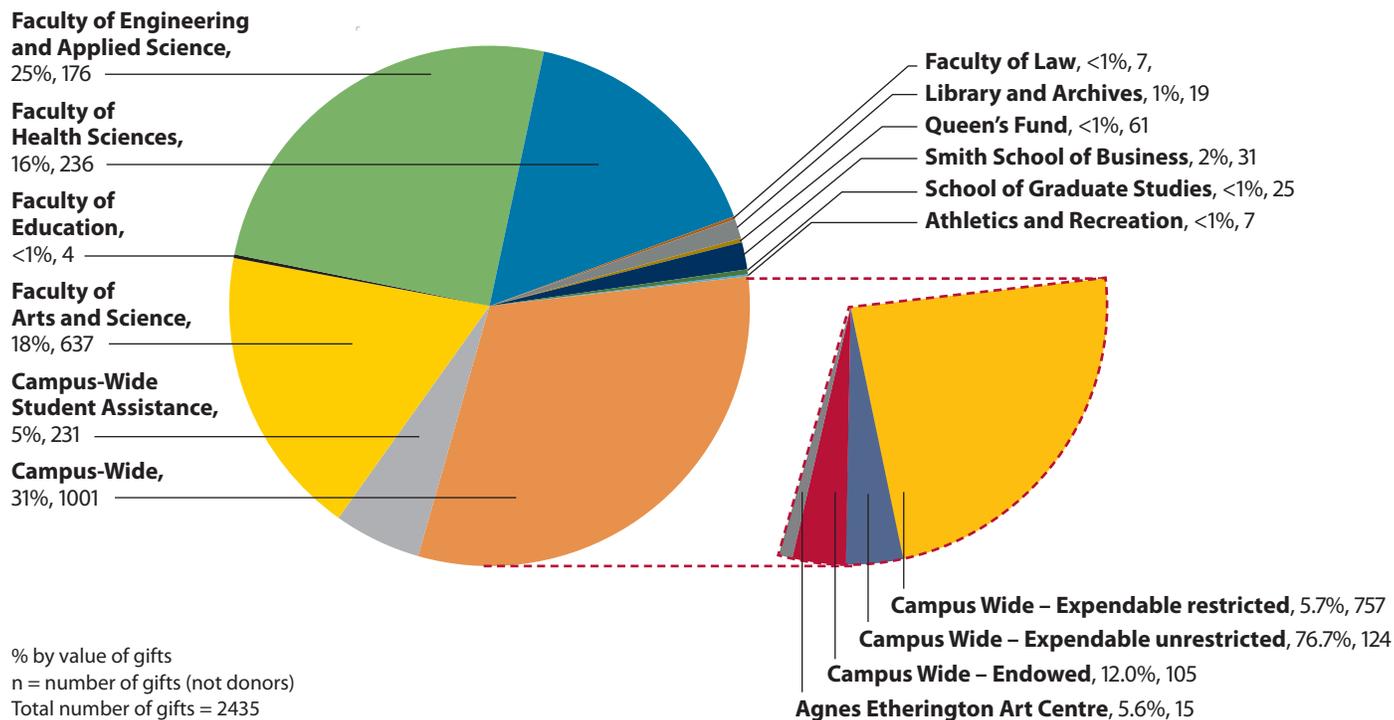
A reflection of legacies realized

During the course of the Initiative Campaign (2006-2016), 274 people remembered Queen's in their estate plans, averaging \$210,000 per legacy realized.

Who has made planned gifts to Queen's?



Where has Queen's benefited from these legacies?



Over the years, people just like you have chosen to make Queen's a part of their legacy, assuring the well-being of the university and its students for years to come.

What will
your legacy
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makes a
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Interested in remembering Queen's in your estate plans? Let us help.

Simply contact the Gift Planning office at 1-800-267-7837 or gift.planning@queensu.ca.

Royal Legacy Society

The Royal Legacy Society, established to recognize those alumni and friends who have thoughtfully remembered the University through a bequest or another future gift commitment, is named in honour of Queen Victoria, who established Queen's University by Royal Charter in 1841.

Royal Legacy Society members receive a Certificate of Appreciation signed by the Principal and Vice-Chancellor, and may choose to be recognized on our donor wall housed in the 1923 Reading Room of Douglas Library.

If you have already remembered Queen's with a future gift, please let us know so that we can appropriately honour your intention.

We look forward to welcoming you into the Royal Legacy Society.

For more information, please visit our website at queensu.ca/alumni/supporting-queens/recognition/appreciation-societies

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