

Heritage

America is the most philanthropic country in the world with a unique value of generosity steeped in our country's history. This value manifests itself through our desire to help each other, so that everyone has a personal stake in charting a positive future for our communities and our country.

At Gonzaga, we have a deep tradition of helping others receive one of the most important life-transforming experiences: higher education. We do this not for ourselves, but rather in the spirit of our Jesuit mission of developing and being people for others.

This issue of Heritage showcases this tradition in several ways, particularly through our two stories featuring an extended alumni family and a beloved faculty member. Each story demonstrates why Zags choose to partner with Gonzaga to ensure its viability for generations to come. These wonderful people show us that philanthropy is an investment in the future – through our students – and the sharing of social capital is how this tradition will live on today, tomorrow and in perpetuity.

If you are ready to explore the possibilities of investing in the future through Gonzaga, we are here to serve and partner with you.

In the Zag spirit,



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Have your cake & eat it too! Reveal your annual gift annuity income. Find your age and search the list below.

65 \$1,275	66 \$1,300	67 \$1,325	68 \$1,325	69 \$1,350	70 \$1,400	71 \$1,425
72 \$1,450	73 \$1,475	74 \$1,525	75 \$1,550	76 \$1,600	77 \$1,650	78 \$1,700
79 \$1,775	80 \$1,825	81 \$1,875	82 \$1,925	83 \$1,975	84 \$2,025	85 \$2,075
86 \$2,125	87 \$2,175	88 \$2,225	89 \$2,300	90 \$2,375		

Annual annuity income is based on a \$25,000 charitable gift annuity with Gonzaga University.

A SWEET DEAL!
More inside

Reflecting on Relationships

A recruiter came to St. Francis High School when Bob Burke ('67) was considering college and asked if he and his classmates liked to have fun. Right away, Bob was sold on attending Gonzaga. But he did more than just have fun — he forged lifelong friendships with a great group of Zags.

Most importantly, Bob met and fell in love with Stephanie “Stevie” Cada ('66), a fellow Zag whose journey to GU began more than 9,000 miles from Spokane. Stevie enrolled at Gonzaga after her dad transferred to Fairchild Air Force Base from Africa.

At Gonzaga, Stevie and Bob formed deep connections with their classmates. Through the years, this group of friends remained close, investing in each other’s lives and businesses. They watched their own children become friends — several of whom also came to Gonzaga, as the Burke’s son Brendan ('00) did.

“I just assumed that everyone else who went to college had the same experience, that it was natural, and now realize it isn’t,” said Stevie. “I know some people don’t think about their university, it’s just something they did in the past. For us, it’s a living and breathing thing, which made giving back really important.”

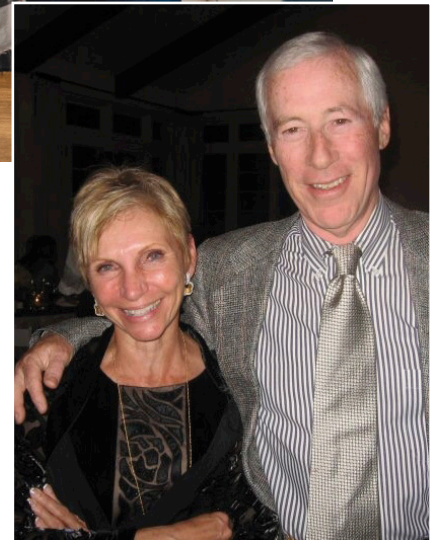
Bob and Stevie established an endowed scholarship for business students in 1999. Prior to Bob’s passing in 2010, he spoke to his son about becoming more involved with the family scholarship. Now, Brendan has a family of his own and handles family philanthropic decisions in lockstep with his mother.

The Burkes are Zags committed to helping others become Zags. Their endowment fund provides annual scholarships for GU business students and through the gift Stevie has planned in her will, the fund will continue to grow and support students in perpetuity.

“Growing up in a Gonzaga family, surrounded by Gonzaga people, it’s all trickled down to my generation,” said Brendan. “Now it’s our turn. Our family has had such wonderful experiences because of the friends we made here. We’ve been blessed by this experience and now we want to give back so others can experience how lasting this opportunity can be as well. When I was younger, I probably didn’t understand this, but now I realize that so many people helped me out, one way or another.”



Stevie ('66) and
Brendan ('00) Burke



Stevie ('66) and
Bob ('67) Burke

The Burkes are honoring the enduring relationships that began so many years ago by passing the baton to a new generation to forge their own Gonzaga networks. They are the University’s heritage — as are you. Your legacy is Gonzaga’s future.

**Honor your lifelong Gonzaga connections
with a gift for student scholarships or
academic programs in your estate plans.**

WE ARE HERE TO HELP.

Where There is Hope

Every day, Gonzaga psychology professor Nancy Worsham, Ph.D., sees the next generation through a lens that magnifies the good around her.

“Whenever I get really concerned about the world,” she said, “it’s these millennials I believe in. I’ve been fortunate to be at a university that has relatively small class sizes so I can build relationships with them.”

Her belief stems from her students. Like the one who served in the Peace Corps and went on to pursue a master’s in public and global health. The student shared how much she valued Worsham having taught her mindfulness — something that was helpful for her while serving in the Peace Corps — when she was cold, hungry and scared, she was able to be present in the face of suffering and loss around her.

“These students are so impressive,” Worsham mused. “They’re lovely people who help others through their understanding of our common humanity. From the core curriculum and our mission, they’ve been exposed to Jesuit values and are aware of issues of diversity and social justice.”

This was especially evident at a time when life came down hard on Worsham — her students stepped up in little ways that made a big difference. Worsham felt fortunate to have built relationships with her students and colleagues, and to find out just how meaningful they were during her own time of strife.

“I’d gone through some significant losses,” she explained, “and they really showed up for me.”

Whether it was just being there to listen, telling her, “we have so much respect for you,” or even a bouquet of flowers, every little gesture of understanding had a tremendous impact on Worsham. They were truly Gonzaga moments, exemplifying the kindness and sense of community for which the University has become so well known.

“I love teaching and these experiences gave me a renewed sense of purpose and meaning,” shared Worsham. “I’m much more aware of the needs and challenges our students face. I was a first-generation student and I worked full-time. Some of my students are doing that now, too. I know how tough it can be. Every little bit helps and can have a huge impact on perpetuating the community we have here.”

Like a lot of people her age, Worsham hadn’t yet made plans for her estate. The youngest of five with no children of her



Nancy Worsham, Ph.D.

own, Worsham wondered, “How can I do good work with whatever assets I have?” After asking that question, she then realized she had been investing in Gonzaga students with her work all this time — why not take it one step further?

“It made sense to me,” she said. “So, I decided to make Gonzaga a beneficiary of my retirement assets with the goal of starting the Worsham Family Scholarship for first-generation students.” Worsham added, “It isn’t about being a big benefactor. You don’t have to leave your entire estate — if you have children or other causes, support them! But even a small gift might help a student buy books or be able to stay here. It’s just so important we have educated and informed citizens, because then we’ll have compassionate citizens. When I think about my legacy, what comes to mind involves connection, community and relationships. Gonzaga provides a context that offers opportunities for these, and through that, hope.”

**Build a legacy of hope for
tomorrow with a gift in your will.**

WE ARE HERE TO HELP.

Heritage Society Honor Roll 2018-19

The Heritage Society was founded in 1980 to recognize a legacy of giving at Gonzaga and honor alumni and friends who have made a commitment to the University through an estate gift. Estate gifts to Gonzaga are made in many forms, including bequests, gifts of retirement plan assets or life insurance, or charitable gift annuities, remainder unitrusts or lead trusts.

The individuals listed and others (who wish to remain anonymous) comprise this group of benefactors.

† = Deceased

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 Pamela J. Smith Acuff
 Maureen and Maxime Albi
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 Lee † and Barbara Wright
 Dominic J. and Lisa Zamora
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 Stephen and Elizabeth † Zimmer

Heritage Society: In Memoriam
 Please visit our In Memoriam
 section – gonzagaheritage.edu

Great care was taken to ensure the
 accuracy of this listing. Please inform
 us of any errors or omissions by
 contacting the Office of Planned Giving
 at (509) 313-6141 or (800) 388-0881.

THANK YOU

Gonzaga is honored and grateful to have received estate gifts between March 15, 2018 and March 1, 2019 from the following alumni and friends, who were inspired to leave a legacy and have an impact on the following areas:

Academic Programs

- The remainder of a charitable gift annuity established by **John and Elizabeth Leonard** was added to the School of Engineering Excellence Fund.

Buildings and Improvements

- Gifts from the Estate of **Myrtle E. Woldson** will make possible the opening of the Myrtle Woldson Performing Arts Center this spring.

General Support – Unrestricted

- Unrestricted gifts were made by **Ernest J. Becker ('57)** and **Richard J. Murphy ('60)** by listing Gonzaga as beneficiary of their retirement assets.
- An unrestricted gift from the **Robert A. and Beryl M. Coomes Trust ('57, '57)** went to work immediately in support of students.
- **Trudy Patton-Bigham Lieb** made her ultimate gift to the Fund for Gonzaga with a gift from her will.

Scholarships – Annual

- A gift from **David Hamer's ('55)** will established the Don Herak School of Engineering Scholarship, in honor of his dear friend, for students with financial need.
- **David J. Ross ('62)** provided a gift from his trust for the Zag Scholarship Fund.

Scholarships – Endowed

- **Henry Gilmore ('52)** provided a gift from his will for the Lyle Moore Endowed Scholarship in honor of his cherished Gonzaga Glee Club experience.
- The Estate of **Edwin T. MacCamy ('36)** made a final gift to the Edwin T. MacCamy, M.D. and Elinor McAuley MacCamy Endowment for students in need.
- The Estate of **Myrtle E. Woldson** provided gifts for much needed scholarships through the Myrtle E. Woldson Endowed Scholarship.

*You are our Heritage.
 Your Legacy is our future.*

A Sweet Deal!

Find your Rate with a Charitable Gift Annuity *(One Life Annuity Rates by Age)*



Call our office for gift annuity rates available for two lives.

A charitable gift annuity (CGA) with Gonzaga may be the perfect way for you to support the University and increase your retirement income.

Here's how it works:

- In exchange for a gift of cash or appreciated securities, Gonzaga agrees to pay you (and/or a loved one) fixed payments for life. The minimum gift amount is \$25,000.
- Your annuity rate is based on your age at the time the gift is established. The minimum age to establish a CGA is 65. **If you're not yet 65**, consider a deferred gift annuity. This allows you to make a gift now and choose a later date to start your annuity payments.
- Tax advantages include a charitable income tax deduction in the year you make the gift and annual tax-favored payments.
- Best of all, 100 percent of whatever remains in the gift annuity will support Gonzaga students.

CGA EXAMPLE

Based on a gift of \$100,000

One Life

AGE	75
GIFT	Cash
ANNUITY RATE	6.2%
ANNUAL PAYMENT	\$6,200 (\$4,433 is tax-free)
CHARITABLE DEDUCTION	\$45,047

Figures cited in example are for illustrative purposes only

Annuities are subject to regulation by the State of California and payments under such agreements, are not protected or otherwise guaranteed by any government agency or the California Life and Health Insurance Guarantee Association. A charitable gift annuity is not regulated by the Oklahoma Insurance Department and is not protected by a guaranty association affiliated with the Oklahoma Insurance Department. Charitable gift annuities are not regulated by and are not under the jurisdiction of the South Dakota Division of Insurance.

Your Guide to Making Gifts to Gonzaga

MAKE YOUR MARK NOW – GIVE TODAY

- Write a check or give online at: **www.gonzaga.edu/giveonline**.
- Transfer appreciated marketable stock or mutual funds and bypass capital gains tax.
- Gift real property or a life insurance policy you no longer want or need.
- Transfer funds from your IRA to Gonzaga, tax-free (see back page for more details).

GET INCOME NOW – GIVE TO GONZAGA LATER

- Make a gift of cash or stock to establish a **charitable gift annuity** that pays you quarterly income for the rest of your life — a portion of which is tax-free. Afterwards, Gonzaga will receive the balance of the annuity account. You must be 65 or older and this is not available in all 50 states. This type of gift involves a simple two-page agreement, supplied by Gonzaga.
- Make a gift of cash, stock or real property to a **charitable remainder trust** that pays quarterly income to selected beneficiaries for life or a chosen number of years. Afterwards, Gonzaga receives the balance of the trust. An attorney is required to prepare a charitable trust document.

FUTURE GIFTS THAT COST YOU NOTHING TODAY

- Name Gonzaga as the beneficiary of an IRA, 401(k)/403(b), life insurance policy, bank/ brokerage account, etc. Be sure to let us know if you do! This will make certain we can follow up with your plan custodian upon your passing to ensure your gift is used at Gonzaga according to your wishes. Information you will need for your beneficiary form:

GU's Legal name: **Corporation of Gonzaga University**

GU's Tax ID#: **91-0236600**

- Provide for Gonzaga through a gift in your will or living trust.

Sample language for your attorney: I give to the Corporation of Gonzaga University, a Washington State non-profit corporation, headquartered in Spokane, Washington, the sum of \$ _____ (or _____ % of my estate, or the property described herein) to be used for _____

(specify the purpose, e.g. endowed scholarship, unrestricted, a specific program, etc.).

IRA Rollover

Support Students with a Tax-Free IRA Charitable Rollover Gift

The IRA charitable rollover (also known as a qualified charitable distribution or QCD) provides retirees with an incentive to give to charity during their lifetimes by offering the opportunity to avoid income tax that is normally due upon IRA withdrawals.

Benefits:

- Avoid paying income taxes on the amount you transfer to Gonzaga.
- Each taxpayer can transfer up to \$100,000 per year.
- You can fulfill all or part of your required minimum distribution for the year.
- Your gift will support what is important to you at GU.

How it works:

- You must be 70 ½ or older to make a gift from your IRA.
- You can choose how much you want to contribute (up to \$100,000) in each calendar year. If you have a spouse, he or she can also give up to \$100,000 from their separate IRA account.
- Distributions must be made directly to Gonzaga and completed by December 31 of each tax year.
- The amount transferred will count towards your minimum required distribution and will not be included in your taxable income.



Important Year-End Planning:

If your IRA administrator has given you the option to write checks off of your IRA account, please make certain that you get your IRA rollover check to Gonzaga well before the end of the year so that it can be cashed and the funds transferred prior to December 31.

Contact Information:

Office of Planned Giving
502 E Boone Avenue
Spokane, WA 99258-0098
(509) 313-6141 or (800)388-0881
plannedgiving@gonzaga.edu

For specific instructions, visit:

www.gonzaga.edu/IRARollover
or call **800-388-0881**



The information presented in this publication is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.