



YOUR LEGACY

Newsletter - Spring 2026



UNIVERSITY
OF ALBERTA

Paying it forward with the gift of education

Mary Babowal, '67 BEd, and her late husband Walter Babowal, '58 BSc(CivEng), '60 MSc, met while studying in the Rutherford Library at the University of Alberta.

Shortly after, Mary went on to teach, and Walter stayed to finish his master's degree. The two ran into each other in Calgary five years later. And there they began their life together, moving to Edmonton, Regina and eventually residing permanently in Calgary.

As children of Ukrainian immigrants, education was a value instilled in both at a young age. "It was



something the immigrants did. There was no question of 'if you go to university,' it was 'when you finish high school, you will go to university to do better than we did,'" recalls Mary.

Mary and Walter Babowal

She shares, "my parents couldn't afford very much, but at the time, U of A had a one-year teaching program. You took the one-year program and then you could work during the school year and do courses during the summer to finish your degree."

Mary reflects on the benefit of the ability to complete her degree while working, and resonates with the students of today. "There are kids today who can't afford university." She and Walter decided to help by providing a gift in their Will to the U of A to create two endowments in their names in support of student awards in the Faculty of Education and the Faculty of Engineering. Their generous gifts will help future generations of students attend university and pursue their careers.

The couple's grandson also inspired their generosity. Born with a hearing impairment, Mary and Walter saw how the right support has positively impacted their grandson's life. And so, their legacy gift will create the Walter & Mary Babowal Bursary in honour of their grandson. Their second endowment will support the Walter & Mary Babowal Graduate Scholarship in Civil Engineering.

Mary encourages other alumni to consider a legacy gift to the U of A. "There's a generation of us who were products of immigrants and have done well thanks to a university education. Pay it forward, as they say."

Legacy gifts provide hope

"I grew up in a small town. And if you didn't step up and help, nothing would happen. There wouldn't be a community rink, a community hall, or a community theatre group. That's kind of the community-minded spirit that I grew up in."



Lana Walsh

This spirit of giving has stayed with Lana Walsh throughout her life, including her 20-year career in the nonprofit sector. Here at the University of Alberta, Lana worked in the Faculty of Medicine and Dentistry's Advancement Office, helping alumni and donors connect with groundbreaking research happening at the U of A.

"In my work at the U of A, I saw that there are several chairs in cancer research that are underfunded. I had all of this life insurance and no kids or spouse to give it to. So, I decided to give some to support the U of A's cancer research initiatives and endowed cancer chair fund because cancer has affected my family significantly. At the time I decided to make this gift, I was single, and that's not the case anymore. But that has not changed my decision to give," she shares.

For Lana, it's important that when the time comes, her gift is flexible and up to the Dean's discretion.

She goes on to say, "cancer has affected many people in different ways. I don't want to be so prescriptive that it ties the Dean's hands when it comes down to it. It could be 40 more years before the money comes in, and who knows where cancer research will be then."

And while she realizes that her gift won't have an impact for many years down the road, Lana says she feels fulfilled to have made this gift.

"And I feel hopeful," Lana adds. "For what the researchers can do with it, and what difference my gift will make for someone in the future. It's about giving hope to people who need it. I'm grateful that I can do this. And I would encourage others to do the same. It's so important that we do good things with our money. That good could be to take care of yourself and your family. But you can't take it with you, so consider putting some aside for charity. It will help somebody down the road."

We are very grateful for you too, Lana. Your gift will have a tremendous impact on cancer research and the lives of people living with cancer.

Upcoming Events

May 13, 2026: We look forward to celebrating 30 years of generosity at this year's Quaecumque Vera Honour Society luncheon in Edmonton. If you need any assistance with your registration, feel free to reach out to our team. Please RSVP by April 30th.

September 2026: Save the date for U of A Days in Edmonton on September 17-20th. Details about the **What Will Your Legacy Be?** event will be available soon. Our signature event brings together experts to discuss how you can make a meaningful difference for future generations while ensuring your loved ones are cared for. To learn more now or update your contact information to receive an invitation, contact Donna Ma at **780-492-6783** or donna.ma@ualberta.ca.

"Together we can make a difference"

Guy Milner, '74 BA, and his husband, Roger Helfrick, are sharing their story to inspire others to support students at the University of Alberta.

The couple have named the U of A as a beneficiary of a Registered Retirement Income Fund (RRIF) to support the Indigenous Students' Support Fund, an emergency fund for students who are First Nation, Métis, or Inuit peoples of Canada (FNMI). They've also included a gift in their Will to the U of A to support the Wâpanachakos Indigenous Health Initiative Endowment.

"In these crazy times we're living in, we must all do acts of kindness," says Guy. Roger adds, "We can't change everything, but we can do this. And we want to invite people to join us to do what they can."

For Guy and Roger, investing in people, health and social services are the keys to solving the challenges of our time.

Helping others has always been an important part of Guy's life. "I'm happiest when I'm of service to others," he shares. As a young adult, he volunteered with the Alberta Service Corps, working with youth in the Kainai Nation (known at the time as the Blood Indian Reserve #148). He spent his career supporting refugees and people living with HIV. Today, he volunteers with at-risk seniors in Edmonton.

When it came to planning their legacy, the couple carefully considered their options and took time to find a cause that resonated with them both. "One of the reasons we chose the U of A was because when Murray Sinclair did the Truth and Reconciliation report, one of his observations was 'education got us into this mess, and education will get us out of it,'" shares Guy.

Guy and Roger worked closely with the U of A to determine how they could have the most impact.



Guy Milner and Roger Helfrick at the Wâpanachakos Indigenous Health Program's Community Lunch Hour with Alvina Lake, Eagle Woman, Knowledge Keeper and Faculty of Medicine and Dentistry students.

They also work with the Standardized Patient program at the U of A's College of Health Sciences. "Every year, we were meeting this incredible body of enthusiastic young people who wanted to make a difference in the world. It was really inspiring," says Guy.

When the couple learned about the U of A's fund in support of FNMI students in the Faculty of Medicine and Dentistry, they knew that they had found a purpose for their legacy donation.

"We know that our gift can be very focused on this small group. And we know that, in general, these students will have financial barriers that would make university more difficult. To assist with this is very important and we're hoping, helpful," says Guy.

Guy and Roger encourage others who are considering their own legacy to be patient with themselves and open to the process. They also encourage lots of conversation with loved ones about their wishes. And lastly, they believe strongly that a legacy that focuses on helping people and the next generation is what will make the biggest difference.

Planning a Legacy Gift

With careful planning, a legacy gift can even help you to make a much larger gift than you could have otherwise, while still taking care of your loved ones. And your gift can help minimize or eliminate your estate taxes. There are many ways to give a legacy gift, including through:

Gift in Will: Through a gift in your Will, you can make a significant gift through accumulated assets. The most common types are residual bequests and specific bequests. You maintain control and use of your assets during your lifetime. And your estate is entitled to a charitable tax receipt for the gift's total value.

Gift of Life Insurance:

Gift of a policy, or a portion, is a powerful and simple way to support the U of A. You'll receive a charitable tax receipt for the fair market value of the policy and for any subsequent premium payments. Or if you choose to retain ownership of the policy and name the U of A as a beneficiary, your estate will receive a charitable tax receipt. Not only is it a way to create a lasting impact for a relatively modest cost, it does so without significantly reducing the value of your estate available to your heirs.

Gift of Retirement Funds:

Did you know retirement plans with pre-tax earnings are often subject to heavy taxation when left to your children or others? If you have no spouse or dependent child to roll your tax deferred investments over to when you pass, the total value of those accounts must be reported as income on your terminal tax return.

By making the U of A the beneficiary of your RRSPs and RRIFs, income tax on those assets could be eliminated. The tax will still have to be paid but the charitable receipt could offset most or all the tax payable.

Do you have an Individual Retirement Account (IRA) in the United States?

Are you age 70½ or older? If so, did you know you can give up to \$11,000 tax-free directly from your IRA without increasing your taxable income? A Qualified Charitable Distribution (QCD) lets you do this and can also help you meet your annual required minimum distribution (RMD) if you are age 73 or older.

To learn more about the different ways to plan a future gift to the U of A or receive a FREE Estate Planning Organizer, you can contact us or visit us online at uabgiving.ca/Legacy.

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