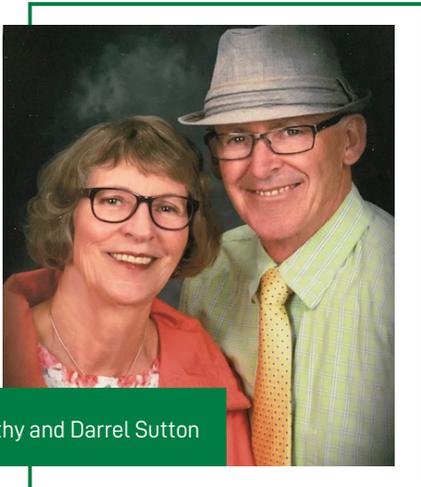


LEGACY

FALL 2020
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A GIFT FOR STUDENTS IN NEED



Dorothy and Darrel Sutton

One summer day Dorothy and Darrel Sutton were taking their grandson to the Saville Community Sports Centre for a curling camp.

There, they met a University of Alberta staff person who told them about the

challenges Indigenous students face. This meeting transformed the Sutton's lives. It led to them making an enormous difference in the lives of hundreds of First Nation, Métis and Inuit (FNMI) students.

The Suttons knew about the tragedy of residential schools. So they wanted to start supporting FNMI students who wanted to earn degrees and return to their reserves to teach.

When Dorothy went to a blanket ceremony and joined a Women's Pipe Ceremony at Enterprise Square on campus, she says it was "inspirational."

There she met one student who *"was a young married woman with three children and two jobs but still committed to getting a university degree. How can*

you not help her?"

The generosity of the Suttons, and their compassion towards the most vulnerable in our society, is inspiring. Going forward, they will be able to help FNMI students with severe financial needs.

Sadly, Darrel died in 2018. But before he died he and Dorothy decided to support FNMI students after they both were gone. They added a generous bequest to their Will.

Dorothy got her BEd at the U of A in 1972 – one year after she married Darrel. They built a family business called BGE Indoor Air Quality Solutions, an air filtration company, which their daughter Roberta just took over. Their other daughter Kelly is an Akashic Records life coach and both of their daughters went to the U of A.

Dorothy says her daughters and their families are doing well. So, she and Darrel felt they could help others less fortunate. Many FNMI students will benefit long into the future from their extraordinary legacy, vision and kindness.

Gifts in Wills, also known as bequests, make a tremendous difference, helping hundreds of U of A students in need each year. With the financial difficulty so many students face these days, with COVID-19 and the economy, your legacy will be a lifeline.

"Meaning and fulfilment truly do come from helping others."
– Dorothy Sutton

If you'd like more information on how to support students, like the Suttons have, please call Kathy Fitzgerald, 780-492-2616, the University of Alberta's Planned Giving Director.

HER GRAND GESTURE

Lillian Upright offers a beautiful example of why it's never too late to pursue your dreams.

As a young girl, Lillian dreamed of playing piano with a major orchestra, with a “knock ‘em dead” dress flowing elegantly behind her. But, her parents expected her to: Get married. Stay home. Raise children.

That's what Lillian did. But then, her life changed forever – her dream came true.

In the mid-1970s, after her sons left home, Lillian started studying piano at the University of Alberta. In a decade of tireless study, Lillian became the first person at the U of A ever to receive a doctorate in piano performance.

She performed across Canada, trained piano teachers, while working as music director for the United Church in St. Albert, AB. Then one day in 1998, she took a step to pursue her special dream. While shopping at a local deli, she cornered Edmonton Symphony Orchestra director Grzegorz Nowak. She asked him for an audition. He agreed, and within a year, Lillian was featured at the Winspear Centre, performing with a major orchestra. She played Mozart's Piano Concerto in C Minor – a dramatic piece she had been working on since age 11.

She says she started piano performance at the age of 41 because she ran out of excuses, *“and also, I think I was chicken,”* the now 86-year-old says, then roars with laughter.

“Music has kept me alive, and next to my family, music has been that essential thing in my life,” she says.

Lillian wants to share her love of music with others. She has left a gift in her Will to

“It's a privilege to help new students realize that the joy it has brought me can be theirs as well” - Lillian Upright



rehabilitate Convocation Hall at the University of Alberta. She wants promising musicians to get the performance experience they need to realize their potential.

“The U of A music program did so much for me, accepting me in my forties and helping to shape me as a performer.”

A crucial part of her education was playing in Convocation Hall, the University's historic recital space.

“To become a great performer, you have to have a great performance space with a great piano and good acoustics.”

But Convocation Hall opened 105 years ago. It has an outdated stage and seating, noisy mechanical systems, small dressing rooms, and poor sightlines. So, Lillian decided to direct her estate to support the Hall's renewal. Her sons' families were financially independent, so she felt she could make this gift in her Will.

Her gift will ensure that U of A music students have an excellent venue to perform and record recitals. And pursue their dreams of musical greatness. Lillian Upright ('80 BA, '82 MMus, '88 DMus) is giving the gift of beautiful music to all of us – long into the future.

A SPECIAL CLUB – AND YOU ARE INVITED

Paulette and Tony Lashuk were uncertain going to that first luncheon. But they discovered a “community of like-minded people.”

And they want to invite you to join.

In 2009, the central Alberta couple had just told the U of A they would make a gift in their Will to the University. They were invited to the annual luncheon as new members of the Quaecumque Vera Honour Society (QVHS). The event brings together donors who plan to make estate gifts to the U of A.

“Our education had a huge impact on our lives,” says Tony, ’79 BCom. “It increased our understanding of the world and helped us achieve our financial goals. So, we’ve always had a provision for the University in our estate.”

The Lashuks decided to tell the University about their intentions so they could share their passion for education and science with others.

Tony and Paulette, ’80 BCom, attend QVHS events throughout the year. They’ve made great friends, met some of the brightest minds in Canadian scientific research and discoveries. They’ve learned how their gift supports innovations that will help future generations.

Paulette had read a story of a U of A student who found a four-billion-year-old rock.

The student was part of the U of A’s donor-supported geology field school in Northern Canada. It’s the only student



Paulette and Tony Lashuk



experience like it in Canada. The story resonated with Paulette, and they decided to support the field school.

“We are so pleased our gift will help researchers and students make the discoveries our world needs to respond to change,” says Paulette.

When you tell the U of A you are interested in making a gift in your Will, you’ll be invited to join this special society. You’ll discover how the University can fulfill your values and vision.

You can learn more about the benefits of QVHS by contacting Kathy Fitzgerald at 780-492-2616 or at kathy.fitzgerald@ualberta.ca. She can tell you about our Virtual QVHS Celebration, which will feature an exciting educational speaker, planned for February 2021. To ensure that the University of Alberta has your correct email address so you can receive your invitation, please contact Kathy.

MAKE A BEQUEST

When you name the U of A in your Will, you commit to world-changing research and the education of future generations. The most common types of bequests are:

RESIDUAL BEQUESTS:

You can designate part or all of your estate to the U of A.

The advantage is that there is no need to update that part of your will, even as your estate adjusts in size.

SPECIFIC BEQUESTS:

Designate a fixed dollar amount or a specific property to the U of A.

The advantage is that the size of the gift remains fixed and is the first to be distributed.

HOW IT WORKS

A donor leaves \$150,000 to the University of Alberta in their Will. Let's assume the total net income on their final tax return was \$100,000. And their net income in the previous year was \$75,000:

1. A donation of \$100,000 can be claimed on their final tax return.
2. A donation for the remaining \$50,000 can be claimed on their previous year's return.
3. Their estate receives a total tax credit of \$75,000 between their final two tax returns*

With your bequest, you will become an honoured member of the University of Alberta Quaecumque Vera Honour Society.

Office of Advancement | Planned Giving,
3-501 Enterprise Square, 10230 Jasper Ave. NW
Edmonton, Alberta, Canada T5J 4P6,
uab.ca/estates

* Tax credit depends on donor's income and specific circumstances

You can get a FREE Estate Planning Organizer:

Download it at uab.ca/estates. Or email Therese North for a hard copy at therese.north@ualberta.ca. There is no obligation.



The information in this newsletter is of a general nature. It is not intended to substitute for professional financial or legal advice. Please consult your own financial or legal advisors before finalizing a legacy gift to the University of Alberta.