

Your Legacy

SPRING 2022

ALSO INSIDE: THE FUTURE IS BRIGHT • PHILANTHROPY IS FOR EVERYONE • SUPPORTING INNOVATION AND EMERGING SCIENCE • MAKE A BEQUEST

“We can help ensure that the next generation of students can complete their studies.”



Greg Yacyshyn

Like many University of Alberta supporters, Greg Yacyshyn values the benefits of a good education.

“I support the U of A because my education helped me get to where I am today.”

Greg is from Edmonton. He graduated with a BA in economics from the U of A in 1990 and has spent 32 years as a Financial Advisor in Edmonton.

Greg is passionate about supporting the University and believes strongly in the importance of U of A’s role in Alberta and Canada.

“The U of A matters a great deal. It employs

thousands of people and serves 40,000 students. It’s one of Canada’s top research organizations and is one of the top five engineering schools in the country.”

Greg believes it’s important for alumni to support University research and student bursaries. He feels so strongly about this that he’s included the U of A in his Will.

“I just wanted to help. It’s important to me.”

Working with Hilary Fabrizio at the U of A, Greg directed the gift in his Will to student bursaries.

“I want my bursary to help students, regardless of their marks. I made sure that my bursary would support anyone who needs help getting by. At the end of the day, most of us know what it’s like to be a student struggling to make ends meet. And we all know how expensive tuition is. So, if we can all do our part, we can help ensure that the next generation of students can complete their studies.”

Greg also encourages other donors to consider doing something similar.

“There can be tremendous tax benefits when you include a charity in your Will. And once your family is well taken care of, a gift of any size — even a small amount — would be a lasting legacy for a lifetime of hard work.”

The Future is Bright

By Kathy Fitzgerald, Manager, Major Gifts and Planned Giving



Kathy Fitzgerald

I developed my love of learning at the University of Alberta and am very proud to be working here. As you know, there are so many areas of study that students can choose to pursue. Every time I meet alumni and donors, I marvel at the different paths we have all taken

and our shared passion for helping future U of A students embark upon their life journeys.

Our first University president, Henry Marshall Tory, said that the University is about

“uplifting the whole people.” I believe that. When you support research, you do more than help the researcher or the team. You enhance the quest to find knowledge and answers to help people worldwide.

When you support the University through a future gift, you guarantee the future of knowledge. You provide precious resources for the next generation of students and researchers.

I know our future students and researchers will do great things for our world.

Lastly, I want to add I look forward to seeing our alumni and donors, like you, in person again. It’s been a difficult two years for many of us, and I hope you know how important and special you are to the U of A community.

Philanthropy is for Everyone

By Hilary Fabrizio, Associate Director, Planned Giving



Hilary Fabrizio

The University of Alberta is a big piece of our province and culture. I often think about how U of A students will continue to help our community thrive and grow long into the future. I’m from Edmonton and majored in language and literature as a student at the U of A.

I’m passionate about connecting with people and felt that language would be a great way to meet people and share stories. It worked. Today, I have the privilege of connecting with U of A donors and alumni every single day.

Donors have a profound impact, and it’s an honour to witness their joy when they can help change the trajectory of U of A students’ lives. Or fund groundbreaking research. Their generosity has a chain reaction. The students and research they support will help other people here in Alberta, Canada, and around the world.

Anyone can be a “philanthropist.” The donors I know are from every walk of life. They’ve worked hard and want to have an impact on the world, all while taking care of their family and loved ones first and foremost. Their generosity is inspiring. And it helps the U of A plan for the future and support students and research for years to come.

I look forward to seeing everyone in person again. Thank you for your generous support of the U of A, our students and research.

Supporting Innovation and Emerging Science

Gary Sargent is grateful that his multiple careers kept him in touch with the University of Alberta.

“I was fortunate to be able to have careers in grain, beef and oil. All of them had a link in various ways to what I learned over the years and took at university. And over time, I appreciated that the University and the Faculty of Agriculture developed ways to have their research applied and used and the knowledge shared.”

Gary graduated from the Faculty of Agriculture in 1969. His graduating class was very involved at the University and subsequently created a student award fund, enthusiastically supported by many members of his class.

And more recently, with fellow classmates Harvey Glasier and Rick Andrews, Gary helped create a new fund for the Faculty of Agricultural, Life and Environmental Sciences (ALES) — the Ag Food Innovation Endowment Fund (AgIE Fund). He also committed a cash contribution and a commitment upon death, in his Will, to have the fund continue at the University for the long term.

“Great universities have great alumni funding, and I want to help encourage more alumni support. This fund will be the first of its kind for ALES. It will be a targeted fund available for the Dean and the Head of the Agricultural, Food & Nutritional Sciences Department to use on emerging agricultural science and upcoming priorities.”

The endowment will provide a steady, predictable and perpetual source of support for arising needs and opportunities. It will enrich the student experience and ensure innovations are incorporated into teaching and research programs for generations to come.



Gary Sargent

Gary saw the benefits of innovative research funds during his career. *“Having a fund with flexibility built into it will help address changing science and needs of the faculty and students.”*

Gary worked closely with the U of A to set up the fund and make a gift through his Will.

“Giving through your Will is a great way for alumni to give back to the University. It has tax advantages to your estate. And it doesn’t compromise your current living situation. Students and researchers at the U of A will be so grateful to the generous donors who make this choice. I encourage all Aggie Alumni to consider giving a cash or legacy contribution to the new AgIE Fund.”

Make a Bequest

When you name the University of Alberta in your Will, you support building a university of tomorrow for future students to seek their purpose. And for educators and researchers to follow their academic pursuits for the betterment of our communities and world. 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:

You 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 once all debts and expenses are paid, it is the first to be distributed among beneficiaries, including family and charities.

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

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*

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

If you have questions, we are here to help you.

Please get in touch with any member of the Planned Giving team at the U of A. If you've already made a legacy gift and haven't told us yet, please let us know. We can work with you to ensure your gift does precisely what you'd like it to do.

You can reach us at:

Kathy Fitzgerald 780-492-2616 kathy.fitzgerald@ualberta.ca
Hilary Fabrizio 780-996-7808 hilary.fabrizio@ualberta.ca



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

OFFICE OF PLANNED GIVING

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