

GENERATIONS

GIFT PLANNING NEWSLETTER | SPRING 2015 ISSUE #16

WheatonCollege
Founders Society



Tracing the Thread - Student Curated Exhibit 11/19/2014 - 1/9/2015.

Giving Is Her Cornerstone

Pricilla Brown Carey '74 reflects on her time at Wheaton and how philanthropy defines her.

"The future starts here!"

This is what every incoming feels on move-in day and feels again four years later at Commencement. In the years in between, students forge their identities, celebrate their individuality, gain significant competencies, and discover, nurture and refine their passions.

So it was for Priscilla Brown Carey '74, who is outspoken when asked about her Wheaton experience, "I have shared on many occasions that my four years at Wheaton were 'the making of me.' I learned how to think, how to work hard both academically and in the dining hall (!), and how to appreciate the value of friends. The Wheaton experience made me confident in my abilities and was always there to support me in whatever successes I had."

If the crux of a Wheaton education is to prepare students "that they may have life, and may have it abundantly," then Priscilla was well prepared. Priscilla spent 35 years in public service with the federal government, is involved with church and civic organizations, and now enjoys a new "encore" career with a non-profit. At the center of her life is Priscilla's spirit of gratitude, belonging, and the belief that "giving is a cornerstone of my life. My husband and I have raised our three children to appreciate what we have earned

and to give to those in need."

An annual supporter of Wheaton since her graduation, Priscilla wanted to know how she could do more. "With a legacy gift, I want Wheaton to know how important my years there were to me and my family – kind of a thank you," she says. Although many people put off estate planning because it may seem overwhelming, Priscilla and Eric found instead that "the process of updating our wills was actually a good time to re-evaluate priorities and give some thought to legacy gifts. I also feel that how you spend your money defines you."

"It's important to me that I can happily define my life by family, Wheaton, and community. It actually makes me happy now that I have chosen where I would like my money to go! I want my children and grandchildren to know what it means to give and to appreciate what was important in my life and perhaps they too will continue a giving tradition."



ESTATE PLANNING

Where to start, and why

“Because I said so.” We’ve likely all heard it or said it in response to the question “why?” But it’s not a particularly motivating reason to do something. Perhaps that’s why more than half of people do not have a will or other estate planning documents in place. . . they hear that they should, but aren’t sure why. Answering that question is really the starting place.

To answer “why”, let’s consider some other questions:

1. What happens if you are incapacitated and unable to handle financial or health decisions? Who would you want to make decisions for you? While we may think of this as a decision that can be delayed until late in life, illness or injury can result in incapacity at any age.

2. Do you have children from a prior marriage? Stepchildren you haven’t adopted? A sibling you’re helping to support? Do you want to provide directly for your grandchildren? These are some of the circumstances where how you want to distribute your assets at death might differ from what would happen if you die without any plan in place.

3. Are there things you own that you want to go to a specific person? Maybe your stamp collection, the decorative plate hanging in your kitchen, or the memento from the family cross-country trip that makes everybody smile? While sometimes the value of such items is monetary, often it is purely sentimental, and they are frequently the most contested items in an estate.

So why should everyone take time to create an estate plan? Because each person’s situation is unique, with specific concerns and priorities. And the place to get started is to consider what those are, and then begin the discussion with your attorney on how to address them in your plan. And if he or she asks “why did you come to see me?” You’ll be ready with the answer “because I have some specific needs to address.”

For a copy of Your Estate Planning Guide and Organizer to help get you started, download it from our website at giftplanning.wheatoncollege.edu/guide or contact Michelle L. Kovach, Director of Gift Planning, at 508-286-3459 or by email at kovach_michelle@wheatoncollege.edu.



President Dennis Hanno leads the Wheaton float in the town of Norton Halloween Parade 10/26/2014.

WHY INCLUDE WHEATON IN YOUR WILL

There is a common misconception that only the super-rich leave money to charity when they die. It's not true. The fact is that most gifts by will, (bequests), are made by every type of person, from all economic backgrounds, who want to have a lasting, positive impact on their community.

Without this type of generosity, Wheaton cannot provide future generations its signature transformative liberal arts education, like you received while you were here.

Here are four reasons why you should consider including Wheaton in your will:

A Gift By Will Is Easy To Make

A bequest is one of the easiest charitable gifts to make. You can give specific property or designate a dollar amount or a percentage of your estate. You can also designate Wheaton as a beneficiary of your retirement plan or life insurance policy.

A Gift By Will Does Not Alter Your Current Lifestyle

Making a bequest is a way of demonstrating your commitment to the future of Wheaton that doesn't affect your current asset balance or cash flow. There are no substantial costs, and the gift can easily be modified to address your changing needs.

A Gift By Will Can Change Lives

Wheaton's liberal arts education improves lives every day. A bequest can help Wheaton further our mission and values and continue making a difference for generations to come.

A Gift By Will Creates A Lasting Legacy

Including Wheaton in your will is a great way to bring dignity, meaning, and purpose to a life well lived. You can demonstrate your commitment to the future of Wheaton, and better yet, a bequest can allow you to increase your support to a level you may have always wanted to, but were unable to during your lifetime.

You don't have to be wealthy to make a difference. Whoever you are, whatever your situation, you can help make a better world by including Wheaton in your will.

WHAT WILL YOUR LEGACY BE?

It's easy to become a member of the Wheaton Founders Society!

By telling the college that you have Wheaton in your will or estate plan, or by establishing a life-income gift with the college, you help ensure that Eliza Baylies Wheaton's dream for Wheaton College is realized. We welcome new members of the Founders Society no matter the size of the gift.

"Founders All Are We..."

As Wheaton's first benefactor, Eliza desired to support the college into the future. Her vision inspires the name of the Founders Society. Modern members share her spirit and provide a solid foundation for Wheaton College to continue to offer excellence in liberal arts education.

With a deep sense of gratitude for their generosity, Wheaton College Founders Society welcomes our newest members of the past year, March 2014 to March 2015:

Molly Carpenter Goodman '57
Elizabeth Foster '60
Margo Jamison Sisson '61
Susan Hyde Fellows '64
Rosemary Pusey Hopkins '64
Anonymous '65
Diana Walker Clymer '65
Colles Baxter Larkin '65
Ruth Rose Skala '65
Alison Grant Small '66

Wendy Sterne Coleman '67
Susan Michelson Glazer '67
Anne Caroselli Reenstierna '71
Starr White Snead '73
Jane Martin '74
M.J. Morrow '74
Kathia Manzi '90
Betty Neal Crutcher
Ronald A. Crutcher, President Emeritus
Susan Kobayashi, Former Staff



Are we missing your name? If you've included Wheaton in your estate plan please let us know and allow us to welcome you! Michelle Kovach, Director of Gift Planning, can be reached at 508-286-3459 or at kovach_michelle@wheatoncollege.edu.

WheatonCollege

Founders Society

26 E. Main Street | Norton, Massachusetts 02766

Non Profit Org.
U.S. Postage
PAID
Brockton, MA
Permit No. 402

GENERATIONS

SPRING 2015

A HEART FOR GIVING. A MIND FOR PLANNING.

GIFT PLANNING NEWSLETTER

INSIDE THIS ISSUE

1 PLANNING FOR SUPPORT **2** WHO SHOULD CREATE A WILL **3** LEAVING YOUR LEGACY

VISIT OUR NEW WEBSITE AT GIFT.PLANNING.WHEATONCOLLEGE.EDU