

GENERATIONS

GIFT PLANNING NEWSLETTER | SPRING 2016 ISSUE #17

WheatonCollege
Founders Society



Christie Kennedy Wyman '87

A lesson on a rewarding gift that pays you back,
from a kindergarten teacher...

Christie Kennedy Wyman '87 loved her Wheaton College experience. With small class sizes that were intimate, and professors who were accessible and interested, she found it easy to form lasting friendships with both classmates and professors. In Norton's small college setting, her self-confidence grew and she became more independent.

A few years ago, she and her husband, Francis, started developing a financial plan for their retirement. Both working for non-profits, they wanted their retirement and estate plan to mirror their values and priorities while still placing a premium on managing their money with care.

Christie tells us, they "...are truly grateful for all we have received in our lives – outstanding educations, basic needs met, excellent health care, and cultural experiences that have broadened and shaped our view of the world. We believe in supporting not only educational and cultural organizations, but those that help make the lives of others better by providing the essentials – food, clothing, shelter, and access to medical care.

These priorities are reflected in the institutions we choose to support, both locally and globally."

For them, a deferred gift annuity really seemed like a win-win. Their two deferred charitable gift annuities will provide them with guaranteed income in retirement and, at the same time, allow them to support Wheaton students in receiving "the same first-class education that I enjoyed and which shaped me both as an educator and community volunteer."

Christie explains that by establishing the deferred charitable gift annuities early on, they were able to show their commitment to Wheaton in a timeframe that worked for them. "We are providing for our own retirement and Wheaton's future. What could be better than that?"



GAINING AN EDGE WITH A WINTERSHIP

Have you heard? Wheaton now guarantees every student an opportunity to participate in an internship, research or other experiential learning project. Conceived as a bridge between classroom education and real-life applications, this component of the Wheaton Edge is yet another way we position our students for success and prepare them for life beyond our campus.

These experiences allow students the opportunity to engage in guided and independent research, develop important workplace competencies, and broaden their horizons. Each year funding is dedicated to support student research and internships; many in collaboration with the more than 400 Wheaton alumnae/i who participate in the college's national network for jobs and internships.

Wheaton's Winternship Program, which runs during the winter break, is part of a larger effort to encourage students to seek outside of the classroom learning opportunities. The Filene Center for Academic Advising & Career Services enables students to receive stipends to complete unpaid internships, research and volunteer experiences over the winter and summer breaks.

During the Winternship Program, these students are able to spend their winter break working in a job, learning new skills, engaging in creative endeavors, and exploring postgraduate opportunities that have personal significance to them. This past January found Wheaton Winternship funding recipients working and learning at these diverse locales:

- *Riverdale Country School, Bronx, NY*
- *City of Monteverde, Costa Rica*
- *San Juan Island National Historical Park, WA*
- *Baruch College, Manhattan, NY*
- *Soho Photo Gallery, New York, NY*
- *Arthur Fink Photography, Portland, ME*
- *Agahozo-Shalom Youth Village, Manhattan, NY*
- *Keller Williams Realty, Portland, ME*
- *Andra Birkerts Design, Wellesley, MA*
- *Slater Mill Historic Landmark, Pawtucket, RI*
- *Physical Therapy of Norton, Norton, MA*
- *New Bedford Art Museum, New Bedford, MA*
- *Upward Bound – Pace University, New York, NY*
- *Massachusetts Department of Children & Families*

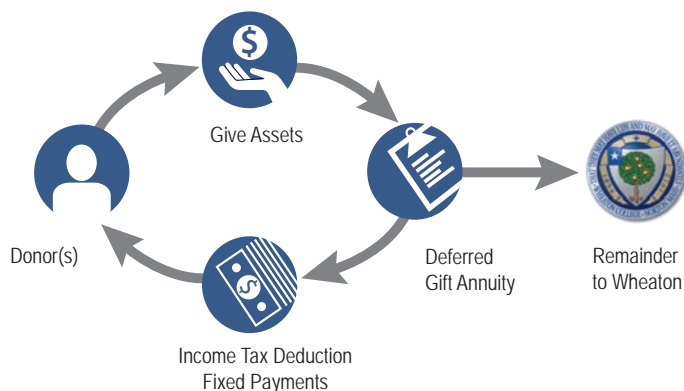


If you'd like to learn more about giving to support an internship, please contact Michelle Kovach, Director of Gift Planning, for a confidential conversation at 508-286-3459 or by email at kovach_michelle@wheatoncollege.edu.

A GIFT THAT PAYS YOU BACK WHEN YOU NEED IT MOST

Many of us cannot afford to make a major gift in our lifetime. But we can set up a legacy gift now so you and Wheaton College receive a great gift in the future.

When you create a *deferred charitable gift annuity* with Wheaton, you receive guaranteed fixed payments for life, starting in one or more years after the gift is funded, while providing lasting support for our students. The deferred charitable gift annuity is an ideal choice for younger donors or those who have not yet retired, providing a tax deduction now and tax-favored retirement income later. Such a deferred investment can supplement other tax-sheltered investment plans, such as IRAs, 401(k)s, 403(b)s, or Keogh plans. And if you give appreciated securities instead of cash, you may be able to reduce your capital gains tax liability as well.



Summary of Financial Benefits:

- You have sufficient income now but want to supplement your income later, for example, when you retire
- By deferring the start of payments, you will receive a higher annuity rate
- Guaranteed fixed payments for life
- A portion of your payments may be nontaxable
- Charitable income tax deduction for a portion of the gift
- Reduced capital gains taxes

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.

With a deep sense of gratitude for their generosity, Wheaton College Founders Society welcomes our newest members of the past year, March 2015 to February 2016:

"Founders All Are We..."

Linda Halverstadt Ottenad '60
Suzanne Townsend Purrington '60
Francine Robbins Craven '63
Linda Whitesell Ritter '64
Jean Jones Beard '65
Linda Langston Copeland '65
Elisabeth Charr Bodurtha '66
Sage Dunlap Chase '66
Charlotte Dill Cheyne '66

Susan Jackson McAnulty '66
Louise Flaccus Reese '66
Hannah Poole '67
Judy Worth Wilson '67
Nancy Rossiter Mobley '75
Irene Castelot Bradford '79
Alison Bahr Taylor '80
Melissa McNerney Babcock '84
Sabrena Tufts '89



Are we missing your name? If you've included Wheaton in your estate plan please let us know and allow us to welcome you!

WheatonCollege

Founders Society

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SPRING 2016

A HEART FOR GIVING. A MIND FOR PLANNING.

GIFT PLANNING NEWSLETTER



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