



YOUR LEGACY

Newsletter - Spring 2023



UNIVERSITY
OF ALBERTA

Making an impact now and into the future

Thomas and Patricia Hewitt believe in the value of an education.

"It opens the door. You have many more opportunities once you have a degree," says Tricia.

"We both came from poor families and had basically nothing growing up," says Tom, who was born in Manitoba, and moved to Alberta at age eight. Tricia, born in Alberta, adds, "But it was instilled in us that an education was important to finding a good job and earning a good living."

They met at the University of Alberta's chemistry laboratory in 1966. Tricia was in Medical Laboratory Science, and Tom was in Honors Chemistry. They married the summer after third-year, and both graduated with bachelor's degrees.

Over the next four years, Tom earned his Masters and Ph.D. His studies and their respective careers took the couple to the USA, and they currently live in Arizona.

When planning their estate, they decided to distribute all their funds to causes they cared about most, instead of paying taxes upon death.

"We have no children, and so it became important to decide what our legacy will be," says Tricia.

This year, they are setting up an endowment fund for the Medical Laboratory Science Department at the U of A. It will provide discretionary funds to the Department Head for scholarships, research or other priorities; this allows the program to react quickly to new needs that will arise in the future. "Discretionary funds are highly desirable because it gives the Department Head an opportunity to fund what they prefer," says Tom.

Next year, the Hewitts will set up a similar endowment in the Chemistry Department. When they both pass away, part of their estate will be added to these endowment funds.

"It feels good," says Tom. Tricia adds, "There are so many young kids who are smart but can't afford university classes. We hope this will help people down the road, our way of giving back to society for the good fortune we've experienced."

Tom and Tricia Hewitt, alumni and donors



Helping students pursue their purpose

Pat Ryan discovered her love for computing science at the University of Alberta in 1980.

As a first-year student in the School of Business, she took two introductory computing science classes.

"I loved them so much. It left me wanting to learn more," says Pat.

And today, she has set up the Patricia Jean Ryan endowment to help students in similar programs at the U of A pursue their purpose.

Pat spent the summer between first and second year taking more computing science courses because



Pat Ryan, alumna and donor

she was so excited by what she was learning. With hard work and encouragement from a professor, she continued to pursue computing and management sciences, eventually accepting a teacher's assistant role in the computing science lab.

She graduated in 1984 with a Bachelor of Commerce degree with a Major in Finance and Management Sciences and a Minor in Computing Science. At the time, it was uncommon to have these two fields combined.

After graduation, she accepted a position with Shell Canada in Calgary and worked there for 32 years in Information Technology. She credits her U of A education for leading her to a fulfilling career, doing what she loves.

Pat's generous endowment will help U of A students pursuing a Bachelor of Commerce or a Bachelor of Science in Computing Science.

"I've set my endowment up already so that I can enjoy it while I'm alive. And, if I want, I can give money to my endowment every year and get tax receipts." She has also left a bequest in her Will and a gift from her registered retirement funds towards her endowment.

Pat's goal is to help pay for a student's entire four years at university.

She knows first-hand the importance of a rewarding career and how an education is the best way for one to achieve their goals.

"A degree gives you a great work ethic. And I think it gives you a leg up for more fulfilling work." Pat feels grateful to the U of A for helping to give her a fulfilling life, and she wants to offer that opportunity to future students.

Upcoming Events

May 10, 2023: Our annual QVHS Luncheon will take place in Edmonton. It's a special opportunity to spend time with fellow alumni and supporters who are passionate about making a difference. And we are pleased to let you know that we are exploring new ways to engage with our QVHS members across Canada and the USA in the coming year. More information to come.

June 1, 2023: We hope you'll join us in person for our annual Celebrating Women in Philanthropy event in Edmonton. You'll hear from inspiring women in the U of A community about the impact of philanthropy in their lives.

“I want the things I do to have an impact - to have a ripple effect.”

Neil Salisbury, Bachelor of Education, 2002, has always known that he is passionate about helping others. He grew up in a small town in rural Alberta, where community giving was a big part of the culture.

His mother was an avid volunteer and he remembers his father lending a hand to neighbours during the harvest season. “It was an unwritten thing. We looked after people.”

These days in his role as Division Manager at IG Wealth Management he helps his clients plan for their future and reach their financial goals. He is also a committed volunteer and philanthropist for the causes he cares about.

One of which is the Fyrefly Institute for Gender and Sexual Diversity (previously the Institute for Sexual Minority Studies and Services), a program run through the University of Alberta’s Faculty of Education.

“When I saw the work that the university was doing in the community, I knew this is what is important to me. I can support this 24 hours a day.”

As a member of the community, Neil sees the need for 2SLGBTQ+ youth in Edmonton and rural Alberta to have access to support resources.

The Fyrefly Institute provides critical support programs and resources to 2SLGBTQ+ youth.



Neil Salisbury, alumnus and donor

Neil served on the board for several years and continues to help through volunteerism and fundraising.

Their most popular program is Camp Fyrefly, a place for youth across Alberta, Saskatchewan, and Ontario, to be themselves, feel supported and learn leadership skills.

Another large project is The CHEW Project, an outpost for homeless 2SLGBTQ+ youth. “To see children as young as eight years old just breaks my heart. This is a really great initiative.”

And a program that Neil helped bring to fruition is Brite Line, a support line for 2SLGBTQ+ people of all ages, created in partnership with the Canadian Mental Health Association.

Neil has also created the Salisbury Trust which will help support the causes he cares most about into the future. This includes a bequest to the Fyrefly Institute.

It’s important to him that the causes he cares about the most have the financial backing they need for years to come, ideally into perpetuity.

“At the end of the day I want a legacy that continues to help my community,” says Neil. And he is passionate about supporting work that will effect long-term change. “I want things that will create positive social change. That’s what I’m here for.”

Events continued...

September 2023 (during U of A Days on campus):

Join us for What Will Your Legacy Be? as we explore the power of philanthropy through strategic estate planning. You’ll hear how donors and alumni have successfully combined both of these to ensure their wishes are carried out while still taking care of loved ones. To learn more, call or email Michelle Ngo at mngo1@ualberta.ca or 780.492.9487.

Planning a Gift for the Future

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: 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.

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 be invited to become an honoured member of the University of Alberta Quaecumque Vera Honour Society (QVHS).

If you have questions, we are here to help you. Please contact any member of the Major Gifts & 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. Then we can work with you to ensure your gift does precisely what you'd like it to do.

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

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 visit us online at uabgive.ca/Legacy.

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