

# ENVISION

A PUBLICATION OF THE OFFICE OF GIFT PLANNING



FALL 2018



## MOTHER PAULINE SOCIETY SPOTLIGHT

MARY LEE SHEFTIC '58

### Donor's Bequest Supports Angela Facility and Scholarships

Saint Mary's is grateful to donors who remember the College in their estate plans, creating a lasting impact on the lives of students, as well as the long-term financial health of the College. These gifts - sometimes unknown to the College during a donor's life - have a lasting effect on Saint Mary's. We'd like to feature one such bequest from alumna **Mary Lee Sheftic '58**.

Mary Lee graduated from Saint Mary's with a bachelor of arts in business administration in 1958. Like many alumnae during her time, she developed a love for Sister Madeleva's poetry, as well as Notre Dame football games. After graduation, her loyal annual giving showed her commitment to her alma mater. She visited the campus periodically and enjoyed seeing updates over the years. A Pennsylvania native, she was also a die-hard Steelers fan.

Mary Lee sadly passed away in 2015, at which point Saint Mary's learned that she had named the College a substantial beneficiary of her estate. Her generous bequest allowed the College Board of Trustees to use the gift for the area of greatest need.

Mary Lee's lifetime gifts were primarily made to the Saint Mary's Fund (formerly Annual Fund) and to scholarships. Following this history, the board voted to use Mary Lee's bequest for a blend of purposes. Honoring Mary Lee's commitment to scholarships, the Mary Lee Sheftic '58 Memorial Scholarship was created to honor her legacy and support Saint Mary's students. This scholarship forwards the College's mission of affordability and access to education for our students.

Additionally, the Angela Athletic & Wellness Complex was a major priority for the well-being of our students, so a portion of Mary Lee's bequest supported the Mary Lee Sheftic '58 Health and Counseling Center. We hope Mary Lee would be honored that her gift supports the mental and physical well-being of students today.

Mary Lee's generous foresight for the College she loved is a wonderful example of the impact our Mother Pauline Society members provide.



## LETTER FROM THE DIRECTOR



Dear friends,

Autumn is a time of change, and I'm happy to introduce myself as your new gift planning contact for Saint Mary's College!

I have been struck by the extraordinary number of donors who have included a bequest for Saint Mary's in their estate plans. These

thoughtful gifts create a legacy in your honor and ensures that Saint Mary's will continue to offer an unparalleled Catholic, liberal arts education for generations to come.

There are other ways to make deferred gifts to the College that actually give back to you! Donors who make life income gifts – charitable trusts and gift annuities – defer their gift to the future and receive income during their lifetimes. These gifts can be a robust part of your retirement plan while also supporting our wonderful students as they become the next generation of women leaders.

I'm so thrilled to work with donors like you to enrich the Saint Mary's community.

Warmly,

A handwritten signature in black ink that reads "Valerie Sherman".

Valerie Sherman, JD  
Director of Gift Planning

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To learn more visit  
[saintmarys.edu/GiftPlanning](http://saintmarys.edu/GiftPlanning)

# EMBODY: BEAUTY, JUSTICE, AND FAITH IN ACTION

In summer 2016, Saint Mary's College kicked off a new summer theology institute for high school girls: Embodiment: Beauty, Justice, and Faith in Action. The institute is generously supported by a grant from the Lilly Endowment, Inc. Participants spend a week on the Saint Mary's campus engaging in activities that explore the connections between their faith and their lived experience as high school students.



Speakers this year included Religious Studies professors Molly Gower and Anita Houck and Center for Spirituality director Arlene Montevicchio. A favorite for the high schoolers is the "Love Your Beauty" workshop hosted by Molly Bell '97; the session empowers participants to recognize the ways that media and advertising shape their self-image and to affirm their own unique beauty.

The entire week is enfolded in a prayerful spirit, with different forms of prayer beginning and ending each day. Embodiment particularly emphasizes how our bodies can be used in prayer, and participants often comment that they had not thought about that connection before.

**Above: Participants pose with pride in front of Le Mans Hall. At right: Embodiment summer institute participants assisted in preparing and planting garden areas that provide free, healthy food to our neighbors in the South Bend community.**





## SAINT MARY'S KICKS OFF SCHOOL YEAR WITH CULTURAL LEADERS

Saint Mary's hosted some spectacular speakers in September to welcome students back to campus.

On September 5, the annual Christian Culture Lecture featured Tracy K. Smith, the Poet Laureate of the United States. The event hosted about 1,000 attendees eager to hear Ms. Smith's perspective on poetry, current events, motherhood, and more.

Ms. Smith spoke about the parallel purposes of poetry and religious parables in describing the challenges of our past and present. She also read selected poems from her books, "Wade in the Water" and "Life on Mars."

Ms. Smith had come to campus earlier in the day to speak directly about the process of poetry composition with groups of Saint Mary's students who are studying English or humanistic studies, as well as area high school students. The entire day's programming was made possible by a gift from Kathleen McAnaney Campbell '65 in honor of her late father, Francis A. McAnaney.

On September 11 at the 2018 McMahon Aquinas Lecture, Cardinal Peter Turkson gave a talk entitled, "The Poor, the Vulnerable, and the Common Good."

Cardinal Turkson is a Ghanaian cardinal and was named the first prefect of the Vatican's Dicastery for Promoting Integral Development in 2017. In speaking about his work with the poor, migrants, and other marginalized groups, the cardinal emphasized themes of humanity, justice, dignity, and taking concrete action to help our brothers and sisters in need.



Cardinal Turkson

Cardinal Turkson also spoke about the importance of resource conservation, such as access to fresh drinking water, as the poorest countries of the world become increasingly marginalized. The answer, he said, lies in working toward kinship and relationships with all humans on earth, all of whom are worthy of equal dignity.



The Mother Pauline Legacy Award is awarded annually at reunion to honor the class that has the most members who have made a planned gift to Saint Mary's College. At the reunion banquet in May, the Mother Pauline Legacy Award was given jointly to the classes of 1958 and 1963. **Paula Lawton Bevington '58** (top photo) and **Dona Duncan Hotopp '63** (bottom photo) accepted the awards on behalf of their classes. We thank all alumnae who have provided for a gift to the college through a planned gift, including a will, trust, annuity, life insurance designation, or retirement plan.



**Valerie Sherman, JD**  
Director of Gift Planning  
108 Le Mans Hall  
Saint Mary's College  
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# ENVISION

## Guest Column

### **DON'T FORGET TO CROSS YOUR Ts: Three common errors to avoid when leaving your legacy to a charitable institution**

#### **1. Use the Specific Name Requested by the Charity**

Check with the charity on how its name and address should appear in your estate plans. For example, several institutions include "Saint Mary's" in the title, which can create confusion, spark unneeded legal battles, or slow down the bequest process.

#### **2. Use Proper Language**

Many donors want their assets to serve a charity in a particular way but fail to use correct language to achieve their goal. If a donor desires a gift to be made for scholarships, language needs to clearly state this. By working with the charity in advance, your legacy planner can ensure that your assets will not only be left to the charitable institution of your choice, but will also serve your intended purpose.



**Alicia Albertson '12**  
Partner  
Ryan, Moore, Cook,  
Triplett & Albertson, LLP

#### **3. Use Tax Advantages to Stretch Your Dollars Further**

Often, donors fail to structure gifts for the most favorable tax results. For example, if a donor has a traditional IRA worth \$100,000 and liquid assets worth \$100,000 and desires to make a \$100,000 bequest to a charity, it is more advantageous to designate the charity as the beneficiary of the IRA and give the liquid assets to their children via will or trust. The charity is tax exempt, whereas the donor's children would pay tax on the IRA funds as they are withdrawn.

By avoiding these common legacy planning pitfalls, donors ensure their gifts make a difference instead of creating administrative burdens to charities and heirs.