

Meet the Planned Giving Staff

Kenneth Dolbashian

Ken, the College's senior planned giving officer, joined Connecticut College in 2010 from the Unitarian Universalist Service Committee in Boston. At UUSC, Ken was the senior adviser to the capital campaign and senior associate for planned and major gifts.

Ken brings a valuable skill to his position: he is an attorney who practiced for 13 years in the areas of estate planning, elder law and probate/guardianship law.



William F. O'Neil

Bill joined the advancement team as director of major gifts and planned giving in 2006.

He was previously vice president of development and alumni relations at Emmanuel College and assistant vice president of institutional advancement at Providence College.

Bill has served as president of the Planned Giving Council of Rhode Island and on the board of the Planned Giving Group of New England. He has an MBA in business administration with a specialization in taxation from Bryant University.



Claire Marcille Gadrow

Claire, assistant vice president for College Advancement, came to the College in 2005. Previously she was director of major gifts and planned giving at the Rhode Island School of Design. She is past president of the Planned Giving Council of New England.

Claire is a certified public accountant and has an MBA from the University of Rhode Island. Her professional experience includes eight years with two international public accounting firms. She was a tax professional for Ernst & Young and an audit professional with Deloitte & Touche.



YOUR LEGACY OUR FUTURE

USING AN IRA ROLLOVER TO MAKE A GIFT

You may be able to use your IRA to make a gift to Connecticut College.

Congress has extended the charitable rollover through 2011. Originally passed in 2006 as part of the Pension Protection Act, the rollover allows you to make direct transfers — up to \$100,000 per year — without having to count the transfers as income for federal income tax purposes.

You must be 70½ or older and transfers must come directly from your IRA to the College. If you have retirement assets in a 401(k), 403(b) or other plan, you can roll those funds into an IRA and then make the transfer.

As with any other gift, you can designate your IRA rollover to support the priority or program of your choice at the College.

You'll get full credit for the entire amount of the gift.

For more information, contact Ken Dolbashian at kdolbash@conncoll.edu or 860-439-2416.



THE CAMPAIGN FOR CONNECTICUT COLLEGE

The Campaign supports excellence in education with four major initiatives: residential education, financial aid, internationalization and science education. Our goal is to raise \$200 million by 2013. As of March 2011 we reached \$157 million. For more, visit:

<http://campaign.conncoll.edu>

For more on planned giving visit www.conncoll.planyourlegacy.org or contact Ken Dolbashian at kdolbash@conncoll.edu or 860-439-2416.



THE CAMPAIGN FOR CONNECTICUT COLLEGE

YOUR LEGACY OUR FUTURE

Planned Giving

A planned gift can be a great solution to financial challenges during your retirement years. Such a gift can help you:

- organize your financial future
- earn tax and other financial benefits
- leave a legacy
- support a cause you believe in — liberal arts education at Connecticut College
- make a larger gift — with greater impact — than you otherwise could

There are many types of planned gifts: bequests, trusts, life insurance and annuities that provide you with income during your lifetime. The type of gift that's right for you depends on your needs. For more information on options, see page 3.

You don't need to make a seven-figure gift. We have gift annuities that start at \$10,000 and give you — and up to one other person — guaranteed income for life. You can also use stock or real property to fund a life income gift that will give you a guaranteed rate of return. And you don't have to wait to take advantage of these investments.

What are your financial challenges? Can a planned gift help? Ask us what's possible. We can help you find a solution that accomplishes what you want.

The Campaign Connection

Life income gifts, such as trusts and annuities, count toward the Campaign for Connecticut College. They also count toward your reunion gift.

If you are over 70 and include the College in your will, your gift is the full amount of your bequest intention. You just need to document your intention either by providing us with a copy of the part of the will that names the College or informing us in writing of your intention.

If you've included us in your will, please let us know. We want to talk with you about your gift and make sure we understand how you want us to use it.



THE ROSEMARY PARK SOCIETY recognizes alumni, parents and friends who've made planned gifts to the College. It has nearly 670 members.

The name honors Rosemary Park, the president of the College from 1947 to 1962.



She oversaw the transformation of the College into a national institution and led a fundraising campaign that made much of the growth possible.

During President Park's tenure, enrollment grew by a third and the College cemented its reputation for excellence. She guided a major revision of the curriculum and oversaw construction of a dozen new buildings — including the six residence halls of the Plex and the College Center at Crozier-Williams.

President Park understood the importance of philanthropy to education and made a planned gift — a bequest — to the College.

First Person

A planned gift can be the ideal solution to financial challenges. Different gifts meet the needs of these Connecticut College supporters.

■ Professor George J. Willauer & the Reverend Cynthia C. Willauer '72

Wanting to be Part of the College's Success

Type of Gift: An annuity that provides life income

The Willaurs arrived at Connecticut College in 1962. George was an English professor and their home soon became a popular gathering place for students and department faculty — including Professor William Meredith, a Pulitzer Prize-winning poet.



The guests enriched their lives in ways the Willaurs never would have imagined. No topics were off limits as students and professors tackled difficult subjects over dinner or afterward in the living room.

One of the Willaurs' favorite memories is a trip to Tanzania

in 1995 with Professor Marion Doro. They celebrated George's birthday with their students, sitting on the ground, eating African food with their fingers and being serenaded by African drummers. At the end everyone joined in the dancing.

"I give to Connecticut College with gratitude for what it has given me and my family," Cynthia said. She is also proud of its environmental leadership.

George, who retired in 2002 as the Charles J. MacCurdy Professor Emeritus of American Studies, gives out of gratitude too. He has enjoyed watching the College grow over the years. "I want to be part of its successes," he said.

■ Judith Ammerman '60

Appreciating the Ability to Never Stop Learning

Type of Gift: Life insurance and bequest intention

Judith Ammerman, a math major and teacher, has a special appreciation for her Connecticut College education.



"Connecticut College gave me an excellent education and the ability to never stop learning," said Judy, an emeritus trustee and longtime volunteer. She gives back out of gratitude. "This is an exceptional college with a great faculty and a wonderful atmosphere for learning."

Judy endowed the Center for Arts & Technology because she wanted to reinforce and encourage what the College had begun.

Her gifts have also supported scholarships, internships and faculty. Students should not be turned away because of financial constraints, she believes.

"I can think of nothing better than to support students' creativity in blending various forms of the arts with technology," she said. "The results that I have seen have been truly unbelievable."

■ Diana Witherspoon Mann-Schnake '57

Giving Back to an Institution that Gave So Much to Her

Type of Gift: Real estate given through trust

After goofing off freshman year, Diana Witherspoon Mann-Schnake's scholarship was in jeopardy.

Dean Alverna Burdick, a legend to many alumnae, laid it on the line with a much-needed warning: "Diana, you can do a lot better than this! Last chance." Diana took the words to heart. In one semester she went from probation to the Dean's List.



That is why she gives back to Connecticut College today. "Everything that has come to

me, from my career to my passions for art, history and music, are the direct result of the wonderful liberal arts education that I was lucky enough to receive," she says.

Diana has a doctorate in neurophysiology from Brown and began a second career in real estate in the 1980s. She was one of the first agents in Maine to advocate for the rights of buyers. Along the way, she and her husband, George, blended a family of five children.

In retirement, when the sluggish housing market stalled the sale of their rental property, she and George realized a planned gift was the answer. They transferred ownership of a condominium to a charitable remainder trust to benefit the College. The Schnakes were freed of an unwanted responsibility, and through the trust the College can plan for scholarships for future students. The story comes full circle.

Planned giving is an option Diana suggests others should explore. "We had a challenge and we were able to turn it into something positive for the College and for us," she says. Both will see the benefits long into the future.

■ Miriam Shapiro Harris '55

Remembering the Beauty of the Campus

Type of Gift: Bequest

Miriam Harris only studied at Connecticut College for two years but she and her mother — both from Brooklyn — never forgot the beauty and peace they found in the Arboretum.

So when Miriam was considering her estate plans, she decided to honor her mother, Lillian Niederman, by establishing and naming a garden for her in the Arboretum.

Miriam wasn't sure how to do that. So she contacted the staff in the Office of College Advancement for advice. Bill O'Neil, director of major and planned gifts, provided wording that Miriam could give her attorney to make sure her will included a provision for the College.



By contacting the College, Miriam ensured that the Lillian Niederman Garden will include the flowers her mother loved — peonies, azaleas, rhododendrons and lacy ferns — and a comfortable teak bench where visitors can rest and enjoy the greenery.

Her \$100,000 bequest will create the garden and an endowment to provide for its upkeep.

Miriam, who earned a doctorate in child psychoanalysis and was a past president of the Plato Society at UCLA, died in California in September 2010. The College will remember her and her mother with a plaque naming the Lillian Niederman Garden and honoring Miriam's generosity.

Types of Planned Gifts

The type of gift that is best for you depends on your needs and expectations. We encourage you to talk with your financial adviser, family and the College about the options available to you.

Bequest

A bequest is a provision in your will, retirement plan or trust that gives Connecticut College a specific gift or a percentage of your estate. Making a bequest is the easiest way to include the College in your estate plan.

Please let us know if you intend to leave a bequest to the College. We'll talk with you about your gift and make sure we understand how you want us to use it.

Charitable gift annuity

In exchange for a gift of cash or securities, the College will provide quarterly fixed-income payments for life to you and/or someone you choose.

They're easy to set up and can be funded with a minimum gift of \$10,000. The rates are based on your age. If you're 72, the current yield is approximately 6 percent.

You will also receive a tax deduction for a portion of your annuity.

Charitable remainder trust

In exchange for a charitable gift that is placed in trust, the College will provide regular payments based on a fixed percentage of the value of the trust.

A wide variety of assets can be used to establish the trust — cash, real estate, mutual fund shares and securities. This gift provides lifetime income to you or others.

Life insurance

Naming Connecticut College as a beneficiary of your life insurance policy is another simple way to give. You can also make a gift of the policy itself — in this instance your gift is the policy's cash surrender value.

Don't hesitate to contact us with questions. We have an attorney, a certified public accountant and an MBA with tax expertise on staff who will help you explore the type of gift that best fits your situation.