

YORK U LEGACIES | WINTER 2014

WHAT'S INSIDE:

MURRAY ROSS | FAMILY AWARD | HUMAN RIGHTS | ESTATE PLANNING | WHITE ROSE LEGACY CIRCLE





HOW THE DR. ALLEN T. LAMBERT SCHOLARS AWARD IS HELPING BUILD A BETTER LIFE FOR HER DAUGHTER AND CANADA'S ABORIGINAL PEOPLE

Lisa Stewart and Ashley Hickey

When Lisa Stewart won the Dr. Allen T. Lambert Scholars Award, she wrote this thank-you note to the late Dr. Lambert's family: "My daughter Ashley says, 'Thank you very much for giving my mom some money so she doesn't have to stress about how she is going to pay her bills. We don't get to spend much time together, but your funds changed this.' "

"This bursary gave my daughter and me a wonderful day together."

Despite the challenge of being a single mom who relies on OSAP as a sole source of income, Lisa Stewart is determined to use her education to improve the life of her family and of Canadian Indigenous people.

Lisa is an Aboriginal Canadian who is almost finished her BA in Race, Ethnicity and Indigeneity with a minor in Philosophy. At the same time, she is also completing two certificates: a Cross-Disciplinary Certificate in Anti-Racist Research and Practice, and a Certificate in Indigenous Studies.

Her dedicated studies and research earned Lisa the Dr. Allen T. Lambert Scholars Award, which four exceptional students receive each year, thanks to

a generous bequest left to York by Dr. Lambert.

Lisa's grant came at just the right time. Her car had broken down; without it she couldn't get to York. She was also feeling sad about not being able to give her 11-year-old daughter, Ashley, even the smallest treats.

With her award, Lisa fixed her car, paid bills, and most importantly, spent a fun day with Ashley.

Lisa explained, "On certain days, I don't see Ashley because she's in school all day and I go to school in the evening. Thankfully, she knows this is only temporary."

Lisa is now setting her sights on law school. Her goal is to focus on Native/Aboriginal human rights. 🌟

Through his estate, Dr. Allen T. Lambert established this award with a \$100,000 bequest for outstanding Canadian Aboriginal or First Nations students showing promise as first-rank scholars and researchers in their chosen field. To date, 45 grateful students have received this award.

Dr. Allen T. Lambert has been associated with York University since it was founded in 1959. He was awarded an Honorary Doctorate in 1982, served on York's founding Board of Governors, and orchestrated the University's first \$1 million gift.

HOW THE DR. MURRAY ROSS AWARD IS ENRICHING HER STUDENT EXPERIENCE



Emily McGaugh

“The Murray Ross Entrance Scholarship has allowed me to have amazing experiences and opportunities that I did not think were possible. York scholarships not only help students like me, but the community as well.” says Emily McGaugh, third-year biomedical science student at York.

When York’s visionary founding President Murray Ross left a generous bequest to create the Murray Ross Entrance Scholarship, he wanted to support and encourage students just like Emily McGaugh, the recipient of his award in 2011/12 and 2012/13.


Emily embodies the qualities that Dr. Ross held dear: academic excellence coupled with other achievements that reflect “wholeness of person and grace in character.”

When she’s not diligently hitting the books, she is ably representing York on our varsity cross-country and track and field teams.

This kind of punishing schedule would be overwhelming for most. But Emily also makes time for volunteer work. During her first two years at York, she volunteered at York-hosted track events, including a Special Olympics track meet. Last summer, she volunteered at a retirement home and worked at a Special Needs camp.

“The Murray Ross Scholarship is helping me to work towards a career in medicine by allowing me to live in residence and focus on my studies and my athletics,” says Emily. “It gives me the freedom to help my community through volunteering. Without these funds, I would have had to work throughout the year, and missed out on amazing experiences and opportunities.”

“I am so grateful for the help.”

Mr. Robert Ross says about his father, Murray: “His formative years were spent working in the YMCA, where he saw the positive impact that combined involvement in sports, the community, arts and academics could have. He wanted to encourage this in the many fine young students enrolling at York. He would have felt gratified to know he’s been able to assist a few of them as they embark on their careers.” 

Dr. Murray G. Ross was the driving force behind the design and development of York University. A native of Nova Scotia, he was an academic staff member at the University of Toronto and served as Vice-President there from 1957-1960. In 1960, he became the Founding President of York University. Dr. Ross instituted the “whole man” concept of undergraduate education. It was his insight, commitment and leadership that helped to build the University.

The Murray Ross Entrance Scholarship is one of York University’s most significant and prestigious awards. Dr. Ross created this scholarship during his lifetime and later augmented it with a bequest when he passed away in 2000. The endowment is currently valued at \$227,230 and has paid out \$124,500 through 18 awards given to deserving and grateful students like Emily.



York University Libraries, Clara Thomas Archives & Special Collections, Murray Ross fonds, ASC02070



FINANCIAL PLANNING CREATES FAMILY LEGACY TO HELP ENVIRONMENTAL STUDIES STUDENTS

Christopher Wilkinson, Melanie and Tim Barker, with Paul and Dorothy Wilkinson

Professor Paul Wilkinson's upcoming retirement prompted him and his wife Dorothy to reflect on his 47 years at York as a student, graduate, environmental studies teacher, researcher, student advisor and administrator and how they might leave a legacy here.

"In these tough times, it can be hard for graduate students to cover both tuition and research expenses," says York University Professor Paul Wilkinson. "My wife Dorothy and I wanted to help outstanding students hang in there because frankly, poverty sucks! We decided to create a much-needed student award by making annual donations to York University and later top it up with a bequest in our Wills."

Professor Wilkinson taught within the Faculty of Environmental Studies for 40 years and advised many graduate students. He has conducted environmental research at York and held many administrative roles, including Associate Dean, York Senator and Board of Governors member.

On top of this, he explains, "We're a York family. I started my studies in Geography at Glendon in 1966, and graduated from York's main campus in 1970 after the Geography program moved to the Keele campus. My wife Dorothy did a BA in Sociology at York, and our son Chris and his wife Melissa are both graduates. Last October our daughter Melanie graduated from York with her BSW."

Wanting to give a helping hand to promising York students while celebrating their family's deep roots at York, Paul and Dorothy consulted a financial advisor last year. "He made some great suggestions on ways we could integrate charitable giving into our financial plans.

"We decided to set aside money each year to create an annual award in the Wilkinson family name for Environmental Studies students doing research at the Masters or PhD level. We will recognize academic excellence and help those studying in my areas of interest and expertise: protected area management, tourism and recreation planning and management, and Canadian and Caribbean resource management.

"Our award will also help to bridge a funding gap often faced by mid-program and mature students, since most awards are reserved for students with top marks coming straight from high school.

"I encourage other grads and faculty to talk to their estate planners and leave a meaningful legacy to York University," says Professor Wilkinson. "Life is too short!" 🍷

Sadly, Dorothy Wilkinson died peacefully in her sleep at home last September in her 66th year. If you would like to learn more about her life, or honour her memory with a gift to the recently-founded Wilkinson Family Graduate Award in the Faculty of Environmental Studies, please visit wilkinsongift.ca

**“YOU CAN’T CHANGE
THE WORLD, BUT YOU CAN
PUT A DENT IN IT”**



Dr. Evelyn Kallen

“York gave me the freedom to be creative. I’m so grateful.”

Dr. Evelyn Kallen has spent her life fighting for human rights and equality. For 21 years, Dr. Kallen was a member of York’s Division of Social Science and the Department of Anthropology. Her extensive anthropological research into ethnic diversity, human rights and racism took Dr. Kallen around the globe.

She encouraged generations of scholars and activists to leave their own “dent” in the world as advocates for equal rights, without distinction of race, religion or ethnic background. Her humanitarian legacy will continue to have a profound impact.

Through a bequest to York University, Dr. Kallen plans to leave a memorable legacy gift so her lifetime work will be carried on through the Evelyn Kallen Distinguished Scholar in International Human Rights within the Faculty of Liberal Arts and Professional Studies.

“This transformational gift aligns with York University’s mission of shaping global thinking and social responsibility among our diverse community,” says Dr. Martin Singer, Dean of the Faculty of Liberal Arts

and Professional Studies. “It is also a true reflection of the dedication and commitment of a revered colleague.”

Dr. Kallen is grateful to York for giving her the freedom to create and design her own courses, in which she taught students how to question and think for themselves. “I have chosen to give in this way because I love York. It feels like it’s my home,” she explains. “York’s interdisciplinary approach gave me the space to create a human rights framework in both Anthropology and Sociology, and for that I am very grateful.”

Since retiring in 1991, Dr. Kallen has remained very active in the Human Rights and Equity Studies program. A York Professor Emerita and Senior Scholar, she frequently lectures on a broad range of international human rights topics.

Her insights and values will live on through future Kallen Scholars, along with her 13 respected books on human rights, and a 14th that is in progress. 🌍



FIVE THINGS TO AVOID WHEN PLANNING YOUR ESTATE

Jordan M. Atin is a senior associate counsel to Hull & Hull LLP, frequent lecturer and chair at Osgoode Hall Law School. He was appointed as one of Ontario's first Certified Specialists in Estates and Trusts Law by the Law Society of Upper Canada. He is also the Chair of the Ontario Bar Association Trust and Estates Section and a full member of the Society of Trusts and Estate Practitioners. Jordan was called to the Bar in 1993 and has an LL.B. from Osgoode Hall Law School.

Jordan M. Atin

1. SURPRISES IN YOUR WILL

Surprises are rarely a good thing to leave in your Will. Family members have certain expectations about inheritances, and when those expectations are not met, some form of dispute or litigation may erupt. Ask your children about their expectations (for example, regarding the family cottage), and if you are not planning on meeting these, try to reset their expectations.

If you are going to treat your children differently, communicate your reasons for doing so through a face-to-face discussion, or a letter in your handwriting left with your Will. Children will hopefully understand that the decision in the Will was yours and not the product of influence from their siblings.

2. LEAVING YOUR SPOUSE TO ADMINISTER OTHER PEOPLE'S ESTATES

Let's say you are an executor of John's estate and no alternate executor is appointed in John's Will. If John's estate is still open when you pass away, your executor (e.g. your spouse) becomes the "successor executor" of John's estate.

Do you want to saddle your spouse with other estates to administer if you pass away? If not, make sure you include a special clause in your Will that appoints another person to become the successor executor of any non-relative's estates.

3. PICKING THE WRONG EXECUTOR

After being in estate practice for 20 years, I suspect that at least a third of all estate disputes could have been avoided had the Will-maker chosen the proper executor. Choosing only one of several children to be the sole executor can create significant hard feelings for

the "non-chosen one(s)". Appointing all children may create an unworkable dynamic.

Using third party, independent executors may end up costing a bit more, but in many cases it will help to avoid conflict, distrust, jealousy and splintering the family.

4. PAYING TOO MUCH PROBATE TAX

If you haven't updated your Will in a while, consider having more than one Will to avoid paying 1.5% probate tax (known as Estate Administration Tax) on certain assets. Using "multiple Wills" is a simple and cost effective strategy to reduce probate tax, particularly if you hold assets such as valuable private company shares.

If you hold assets such as your home, cottage or bank accounts in "joint tenancy with right of survivorship," they will get transferred outside the estate, avoiding probate fees. Although take note - if only one of your children is listed, they may interpret the asset to be entirely theirs after you're gone.

A well-thought-out estate plan that incorporates philanthropic giving also allows you to offset income tax, while leaving more for family, friends and the charities that matter most to you.

5. NOT HAVING A WILL

We all know that making a Will is often not on the top of everyone's priority list, but it is an important task to complete.

You will sleep more soundly knowing that everything you worked hard for will continue to benefit the people and charitable organizations that have been a major part of your life. 🍷

CONTACT A GOOD ESTATE LAWYER AND SET A DEADLINE - YOU WILL FEEL A WHOLE LOT BETTER WHEN YOU HAVE IT SIGNED AND DONE.



David Trick, Vicky Drummond, Cynthia Archer and Lisa Gleva

LEGACY GIVING AT YORK

For many donors, a legacy gift is an easy and thoughtful way to make a lasting contribution to York University and its students, while maintaining financial security for themselves and their family during their lifetime. Legacy giving allows you to plan your future gifts to maximize tax and other benefits.

In the past 27 years, York has benefitted from more than \$15.3 million in estate gifts, including bequests, life insurance policies, retirement plan accumulations, securities, charitable trusts and gifts-in-kind.

With a legacy gift, you can create your own personal legacy at York. These gifts can be directed to the programs or areas that matter most to you, such as scholarships and bursaries, libraries, research, infrastructure, or left undesignated to offer the greatest flexibility.

Experience the satisfaction of helping future generations of students reach their full academic potential and enable York University to plan for the future. Your gift will leave a lasting impression on York and our students and faculty for many years to come. 🌹



WHITE ROSE LEGACY CIRCLE

Last fall, York University held a breakfast celebration to extend our appreciation to the 111 members of the White Rose Legacy Circle. This remarkable group of benefactors has collectively pledged over \$14 million in future gifts for the University.

Linda Chen, second-year BBA student from the Schulich School of Business, told attendees that their gifts have made a huge impact on students like her. "From an idealistic student's perspective, I really want to take this time to thank everyone for their support of York University because with your donations, I feel we can all dream a little bigger. Thank you!"

Linda Chen



The White Rose Legacy Circle

We wish to gratefully acknowledge the following individuals whose foresight enabled them to thoughtfully declare their intention to include a legacy gift for York University in their estate plans. We also wish to thank those donors who have chosen to remain anonymous.

Anonymous Donors

Carmen Alexander-Nash (BA '85)
Eshrat Arjomandi
C. Jane Banfield
Linda Briskin (MA '77, PhD '86)
Karen Cassel
Martha Chapman (BA '91)
Brian Clow (BA '67, MA '89)
M. Barrie and Anne Coukell
Larry Davies (BA '68) and
Denise Loader
Terri-Lynne Devonish (BA '92, LLB '95)
William A. Dimma (MBA '69, LLD '98)
Robert (BA '67) and Vicky (MA '76)
Drummond
J. Bruce Dugelby
Mircea, Christine* and
Alexandru* Dumitriu
Joanne Goldberg Weigen (BA '89)
Tim Haunn (BA '82)
Freia and John A. Heber
Franz Hrazdira

Cindy Johnstone and May Darroch
Johnstone*
June Kingshott (BA '68)
Armand (BA '92, BA '95) and
Denise La Barge
Ken* and Margo* Lamont
Sherry L. Lawson (BA '88)
Peggy Lau (BA '08)
Rhonda Lenton
Ursula Livingston (BA '74, MES '76)
John Bruce Logan (BA '91)
Mary E. Lyons
Louise H. Mahood (BA '77)
Courtney W. Marhue (MBA '77)
Robert* and Patricia Martin
Ken McGowan (BA '77)
Norman and Beverly (BA '78) Noddle
Marie A. Miller (BA '83)
Adrienne Perry (MA '84, PhD '91) and
Don Downer
Willard Piepenburg
Janina Milisiewicz (BA '74)

Susan Prokopenko (MSc '70, PhD '73)
Richard Prupas
Anthony H. Richmond
Virginia J. Rock (Hon. DLitt '94)
Glenna M. Ross (MA '80)
Don Rubin
Judith Rudakoff and Myles Warren
Virginia Sawyer
Russell D. Smith (BA '67)
Linda Starodub (MES '79, MBA '81)
Paul (BA '87, BA '88, BSc '97) and
Lisa (Gleva) Stewart
L. Deborah Sword (MES '93)
W. Mark Treadwell
David Trick (BA '77)
Albert Tucker (BARR '56)
Donald P. Walker (BA '72)
Paul (BA '70) and
Dorothy* (BA '79) Wilkinson
Mary F. Williamson
Joan L. Wood (BA '75)

Thank You For Your Generosity!

If you have included a legacy gift for York University in your estate plans, but do not see your name listed above, or if your name is displayed incorrectly, please contact us at 416-650-8210 or legacy@yorku.ca. An asterisk (*) following a name indicates that the donor has passed away after making a legacy gift.

The White Rose was the emblem of the Duke of York, founder of the House of York in the fourteenth century, and appears on York's official shield. At a ceremony in 1961, following the installation of York's first chancellor, Wilfred Curtis, a symbolic white rose was planted in the Glendon Rose Garden by Lord James of Rusholme, vice-chancellor designate of the University of York in the UK. York's coat of arms was designed by war artist Eric Aldwinckle from 1960 to 1968. The White Rose continues today as an enduring, recognizable symbol of York University.



For more information, please fill out the enclosed reply card, or contact **Marisa Barlas, Senior Development Officer, Gift Planning.**

Division of Advancement
West Office Building
York University
4700 Keele Street
Toronto, Ontario M3J 1P3

Tel: 416-650-8210
Fax: 416-650-8032
Email: legacy@yorku.ca
<http://myyorklegacy.com>
Charitable Registration Number / BN: 11930 6736 RR0001

The information provided in this newsletter is based on Canadian regulations and is general in nature. It does not constitute legal or financial advice and should not be relied upon as a substitute for professional advice. We strongly encourage you to seek professional legal, estate planning and/or financial advice before deciding upon your course of action. For the purpose of legal documents, including Wills, our name is York University.