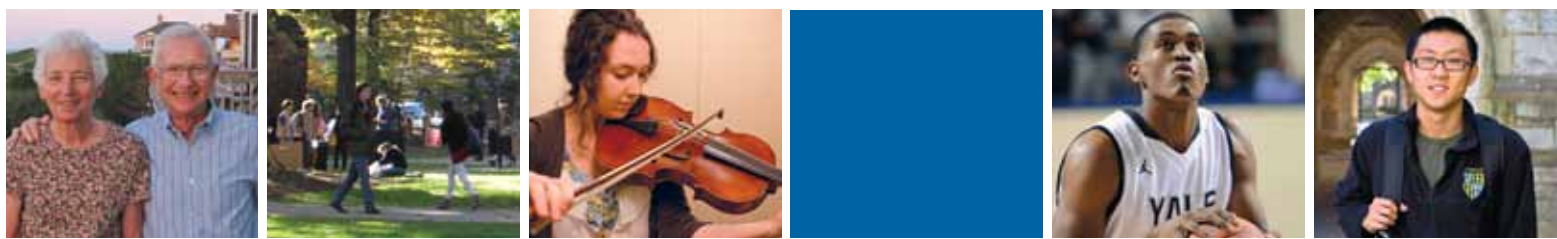


Partners Through Giving

NEWS FROM YALE'S OFFICE OF PLANNED GIVING

Fall 2012 | Volume 6 | Issue 1



A Note from the Director



Eileen B. Donahue
University Director of Planned Giving

For more than three centuries, Yale alumni, family, faculty, and friends have sustained the aspirations of generations of students by supporting the University through bequests.

In this issue, we feature several stories of Yale Legacy Partners who are defining their legacies in the form of endowed scholarships. Yale has long been committed to enrolling the brightest and most highly motivated students, regardless of their financial circumstances. By building Yale's scholarship endowment, these Yale Legacy Partners influence the future and support one of the University's highest priorities.

Perhaps you have considered creating your own legacy for future generations. Through your bequest or other planned gift, you can help fulfill students' dreams of a Yale education and set a powerful example for others to emulate. In addition to financial aid, you may also direct your gift toward outstanding teaching, the arts, athletics, scientific research—any area of the University that is most meaningful to you.

To learn more, please contact me or one of my colleagues in the Office of Planned Giving. As always, we look forward to hearing from you.

With warmest thanks for your continued loyalty to Yale,

Eileen B. Donahue

Why I Give to Yale: Herbert Zohn '54

"I receive secure fixed payments for life and support future generations of Yale students at the same time."

"Patron of the arts" is a title that transcends centuries, reflecting a philanthropic tradition that dates back to the ancient world, but is still alive and well today. Ask Herbert Zohn '54, who on a recent trip to Europe visited such museums as The Bargello in Florence, Italy, home to the Medici-commissioned *David* by Donatello and to many Michelangelo masterpieces that would not have been created without the support of patrons.

Herb himself has been passionately interested in the arts for decades. He spent his early years in Brooklyn—where he had the New York art world at his front door. Taking painting classes as a child and then continuing his interest by studying drawing and art history while an undergraduate at Yale are not only vivid memories, but experiences that paved the way for his subsequent career—owning an art gallery.

In keeping with his lifelong interests, when Herb first decided to establish a Yale charitable gift annuity, he directed his gift toward scholarships at the Yale School of Art—"a place," he said, "in which creativity and collegiality can flourish." Herb has recently established another charitable gift annuity, his seventh since 1998, and wishes he could do even more: "Would that I could make the large gesture these students deserve!" By establishing charitable gift annuities for the Yale School of Art, Herb champions what he loves and encourages the next generation of Michelangelos.



Creating Opportunities for Future Generations



Students on Old Campus

Judge George Saden's Bequest Opens Doors for Scholars

In crafting his estate plan, Judge George A. Saden '31 was guided by two principles – his love of learning and his devotion to Yale. In 1999, he created the John S. Saden, Lillian Chavenson Saden, and Charlotte Marion Saden Memorial Scholarship Fund to honor his late parents and sister and to provide financial



Sudie James Simmons JE '13

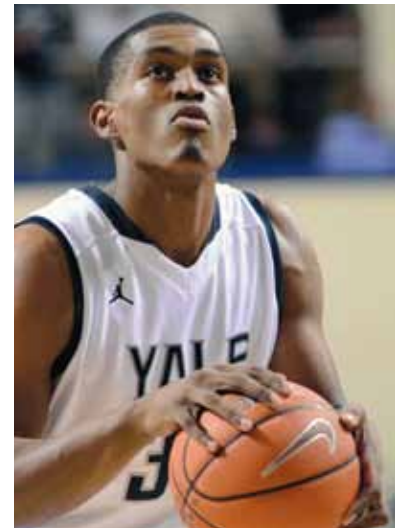
assistance to Yale students, especially those from his hometown of Bridgeport, Connecticut. It was following his death in 2003, however, that the full impact of his generosity to Yale was realized. As the result of an additional significant bequest, the Saden Scholarship Fund now supports four exceptional Saden Scholars at Yale College each year. Sudie James Simmons '13 of Jonathan Edwards College and Brandon Sherrod '15 of Pierson College are two of the current student recipients.

Sudie, who graduated from Bridgeport's Central High School, brought a wide range of interests with her upon entering Yale College, among them psychology, engineering, fencing, and Spanish literature. In the years since, she has emerged as an international and artistic scholar. One of Sudie's mentors comments, "In my eyes, she is a dynamic thinker and has an intellectual curiosity that is second to none."

Fluent in Italian and Spanish, Sudie participated in a Yale Summer Session in Siena, Italy, and also traveled to Rome, Florence, and Venice this past summer. She also enjoyed the chance to work with the Association of Yale Alumni helping

out with reunion weekend events. In addition to playing the viola in the Yale Symphony Orchestra, the Jonathan Edwards College Philharmonic, and the Opera Theatre of Yale College, Sudie has taken on the role of managing director of the Opera Theatre. Her experiences have awakened an interest in the field of arts administration, in which she hopes to pursue a career related to opera and education. Sudie plans to apply for a Fulbright at King's College London to study Theatre and Performance Arts.

Brandon Sherrod '15, a standout member of the men's varsity basketball team, was the recipient of the 2012 John C. Cobb Yale Basketball Rookie of the Year Award. In high school, Brandon was heavily recruited by Division I teams throughout the country. He chose Yale because, "As a Connecticut resident, I wanted a school that was close enough so my family would be able to see me play. And, from an educational standpoint, you can't beat Yale." He says he is "truly blessed to play basketball at a high level, and at the same time, to receive a top-notch, world-class education." Bran-



Brandon Sherrod PC '15

don's prowess is not limited to the basketball court, however. He is a drummer, saxophonist, actor, and gospel singer. Interested in majoring in political science, his ambition is to one day become mayor of his hometown, Bridgeport, Connecticut.

Judge Saden's legacy is but one example of how bequests to Yale have shaped the University for over 300 years. By including Yale in their estate plans, thousands of donors, through gifts of all sizes, continue to touch countless lives.



Priscilla and Jack Baublitz '59

Engineering Scholarship Develops Dynamic Leaders

At Yale, Jack Baublitz '59 completed a special five-year program, a choice, he says today, that uniquely prepared him for his multifaceted professional life. "As a chemical engineering major and a Navy ROTC student, I found it impossible to fit all the required courses into a regular four-year program," he says. "By adding the fifth year, I met the mandatory requirements but also took a variety of electives like Maynard Mack's Shakespeare, Brad Westerfield's Political Science, and Vincent Scully's History of Art."

Courses like these, he says, broadened his outlook well beyond that provided by the standard engineering curriculum and had a significant impact on his life and career—one that would begin as an engineer in the Naval Nuclear Power Program and Argonne National Laboratory and take him to the Energy Research and Development Administration, where he served until his retirement in 1999. His ROTC training prepared him for his twenty-year service in the U.S. Naval Reserves, where he rose to the rank of Captain.

"I am so pleased that Yale has reestablished the School of Engineering and Applied Science," Baublitz said recently. Together with his wife, Priscilla, he has set up a charitable gift annuity to endow an undergraduate scholarship for engineering students. The annuity allowed the couple to make a more substantial gift than they thought possible because of the income and tax advantages they received.

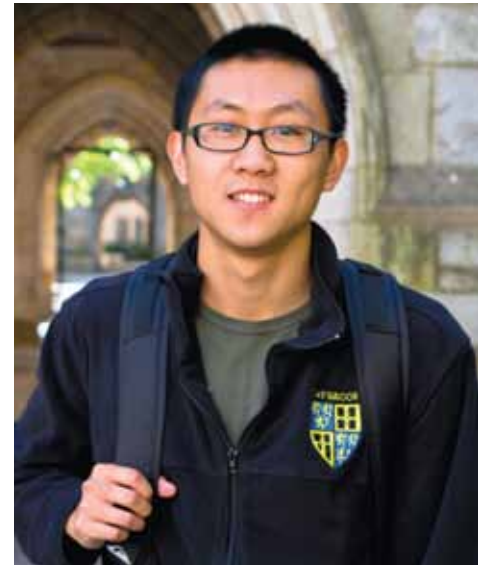
"We hope that our scholarship will enable students to pursue a solid engineering education to meet the growing technological challenges we face in the areas of energy, the environment, and healthcare," Baublitz says. "We also hope that these engineering students' lives will be enriched by the ability to attend classes within Yale's exceptional liberal arts curriculum."

One student who has already benefited is Jonathan Hwang '13 of Saybrook College, a chemical engineering major and the inaugural Baublitz Scholar. The accessibility of laboratory research—a special feature of Yale's undergraduate chemical

engineering program—attracted him, as did the many opportunities for Yale College students to engage in cutting-edge science and engineering through mentorships with senior faculty. "I'm excited to do research in the Townsend Lab in the Department of Ecology and Evolutionary Biology and in the Taylor Lab in the Department of Chemical Engineering," Jonathan says.

The managing editor of *Yale Scientific* magazine, Jonathan also contributes to *Triple Helix* magazine, serves on the Saybrook College Council, and is a fundraiser for Yale's chapter of Engineers Without Borders. He plans to work in the energy or chemical industry following graduation in the spring.

Like Jack Baublitz, Jonathan considers his Yale education to be valuable beyond the laboratory. "Some of the best courses I have taken outside my major were Introduction to the History of Western Music: 1800 to the Present, Reading and Writing the Modern Essay, and in the economics department, Game Theory and the Economics of Natural Resources," he says. "I particularly enjoyed the music history class because it helped me better understand the



Jonathan Hwang '13

progression of musical styles and exposed me to a wide variety of great music. I play the piano, so it was interesting to understand the historical developments behind some musical pieces that were familiar to me.

"My time at Yale has been truly amazing," he added. "I definitely appreciate the combination of friendships, academics, and community that defines the Yale experience. And, I am appreciative of the scholarship support that helped me to participate fully in all the University offers."

A Yale education nurtures intellectual curiosity, inspires athletic and artistic pursuits, encourages adventuresome spirits, and develops strong leaders. Bequests and other planned gifts have helped open the door to these and other possibilities for Sudie, Brandon, and Jonathan... and for many more Yale scholars like them.

To learn more about how you can create opportunities for future generations, please visit us on the web at www.yale.planyourlegacy.org.

Yale Office of Planned Giving

UNIVERSITY DIRECTOR

Eileen B. Donahue

eileen.donahue@yale.edu

DEPUTY DIRECTOR

Mary Beth Congdon

marybeth.congdon@yale.edu

ASSOCIATE DIRECTOR

Carrie M. Lovelace

carrie.lovelace@yale.edu

PLANNED GIVING SPECIALISTS

Laura J. Becker

laura.becker@yale.edu

Betsy D. Gorecki

betsy.gorecki@yale.edu

www.yale.planyourlegacy.org

The Importance of Giving Back: To My Parents and to Yale—*Donna Dubinsky '77*



Donna and her parents Lillian and Alfred Dubinsky

“Looking back now, thirty-five years later, I am so grateful to my parents for enabling me to attend Yale. Their support, along with the generosity of many generations of Yalies, makes me realize my obligations to do the same for the next generation. So, it seemed entirely fitting that as I contemplated my gift to Yale, I found a beautiful vehicle that could both benefit my parents as well as the next generation of students at the same time.

“My parents had moved to a continuing care facility. They were concerned that their assets might not be sufficient to sustain their lifestyle long term, but were uncomfortable about accepting support from my husband, Len Shustek, and me.

“Our solution: a Yale-managed charitable remainder trust. The trust pays a fixed quarterly amount to my parents during their lifetimes and then the remainder will be transferred to Yale. I hope that people realize that they can make a gift, receive a substantial tax deduction, and provide for elderly parents or other loved ones at the same time. It’s a wonderful way to support the previous generation and ultimately benefit the ones that follow.”

Photo credits: Robert DeSanto, Michael Marsland, Yale Office of Sports Publicity, donor contributed photos



Partners Through Giving is published by the Yale Office of Planned Giving. Please direct any comments to Mary Beth Congdon, editor, at marybeth.congdon@yale.edu

Save the Date!
Yale Legacy Partners
Annual Luncheon
May 10, 2013

development.plannedgiving@yale.edu

E-MAIL

203.432.5685

FAX

203.432.7025

800.445.6086

TELEPHONE

GENERAL PLANNED GIVING
CONTACT INFORMATION

NON-PROFIT
U.S. Postage
PAID
New Haven, CT
Permit No. 526

Yale University
Office of Planned Giving
P O Box 2038
New Haven CT 06521-2038