Throughout its history, and with the valued support of alumni, parents, and friends, Yale has made financial aid for its students a priority. Yale College established the nation’s first and one of its most generous need-based financial aid programs fifty years ago. With the launch of Access Yale, Yale has reaffirmed its goal of keeping education affordable. Providing financial support for talented students is a longstanding mission, not only for undergraduates, but also for students in the graduate and professional schools.

Generous donors have already given more than $130 million for financial aid during the first year of the initiative. Nearly $40 million, or approximately thirty percent of these gifts have come in the form of bequests and other planned gifts. One of our planned giving donors expressed his intentions this way: “I’m making a gift from my estate for financial aid. I hope that future Yale leaders will continue to enter fields like teaching, the arts, public health, and nursing where salaries may be low. I want graduates to be able to pursue these valuable professions without the deterrence of significant student loan debt.” Response to Access Yale has been so strong that the university increased the overall two-year goal from $200 to $250 million.

If you are considering a gift to Yale in your estate plans or are thinking about a planned gift to make lifetime payments to you or a loved one, you may find that one of the features in this issue will resonate. I encourage you to consider participating in Access Yale with your own gift—one that costs you nothing during your lifetime or one that may actually increase your income and save taxes. At the same time, you will be helping succeeding generations of Yale students.

And, if you have already remembered Yale in your estate plans, we hope you will let us know. We are grateful for your foresight and welcome the opportunity to thank you and count you among those who are influencing Yale’s future.

Warm regards,

Eileen B. Donahue
University Director, Planned Giving
Senior Philanthropic Advisor
Why We Give To Yale

Drama Alumnus Establishes Annuity to Honor Mentor

The impeccably preserved Victorian-era townhouse on West 26th Street in New York City is where Yale School of Drama alumnus Albert (Al) Zuckerman ’61 MFA, ’62 DFA has based his notable business for more than thirty-five years. Al is the founder of Writers House, one of the largest literary agencies in the world. Writers House represents writers and illustrators of fiction and non-fiction, for both adult and juvenile readers. Books are everywhere at Writers House: one can’t turn one’s head without being confronted by the works of best-selling, prize-winning authors: Ken Follett, Erica Jong, and Stephen Hawking; as well as numerous Nobel Prize, National Book Award, and Pulitzer Prize recipients.

Before immersing himself in the world of books, Al was an ambitious young playwright. After graduating from Princeton, he served in the U.S. Navy and then went to work for the State Department. One of Al’s plays, published in Best Short Plays of 1956, became the impetus for his application for admission to Yale School of Drama.

“Going to Yale was a life changing experience,” Al declares. “The influence of John Gassner, then head of the playwriting department, was transformative. Gassner taught me everything: how to build a scene, how to construct a character.” Upon graduation, at Gassner’s invitation, Al stayed on to teach first-year playwriting. “I came to the realization that I could help other writers.” He has been doing just that ever since.

Al paid tribute to the tremendous influence that the Drama School had on his life and career by establishing a charitable gift annuity (CGA) to benefit the scholarship fund he created to honor his mentor, John Gassner. “My gift annuity gives me reliable payments and tax savings for my lifetime. I feel secure in the knowledge that one day it will provide meaningful resources for generations of students. There is no better way to honor the legacy of a great teacher,” says Al, “than by fostering the careers of young people with talent.”

Albert Zuckerman ’61 MFA, ’62 DFA

Yale Charitable Gift Annuity Rates

Simple, stable, and secure, a Yale gift annuity offers you the peace of mind of fixed payments for life secured by the total assets of the university. At the same time, you have the opportunity to support future generations of Yale students.

Immediate Gift Annuity

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Deferred Gift Annuity (for payments beginning in 5–15 years)

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Minimum gift annuity is $10,000. These rates are for illustration purposes and may vary depending on the timing of your gift. Annuity rates for two individuals are also available.
Influence the Future... Remember Yale in your Will or Trust

A commitment you make today can influence Yale’s future with no effect on your resources during your lifetime. For many alumni, parents and friends, a bequest is a simple and cost-effective way to make a gift. You may designate a specific dollar amount, a particular asset, a fixed percentage of your entire estate, or leave your residuary estate after you have provided for loved ones.

Consider using the following language:

“I give (dollars) or (a specific asset, such as securities, real estate or other property) or (all) or (percent of the rest, residue, and remainder of my estate) to Yale University in New Haven, Connecticut (for its general purposes) or (for the following purpose: ________________________).”

Couple Uses Trust to Fund Scholarship

“When I began at Yale,” Paul Copeland ’72, ’77 M. Phil., ’78 M. D. recalls, “tuition, room and board was $3,300. I was a bursary student at the time with a small loan and so excited to be at the university. Yale was just a fabulous place to be young and eager to learn… in the classrooms, in the libraries, and in particular, the dining halls. I remember exhilarating conversations and true intellectual fervor. A spirit of openness contributed to the stimulating environment. People looked to bring out the best in each other. From what I can tell, Yale is much the same today.

“Maura and I met at Massachusetts General in Boston where I specialized in endocrinology and Maura became a geriatric psychiatrist. Maura and our three children share my enthusiasm for Yale. While we have steadily supported Yale through the years, we recently discovered the benefits of a charitable remainder unitrust. The trust was a perfect way for us to make a gift to endow a scholarship in our names.

“We funded the trust with highly appreciated stock that was paying no dividends: the trust now pays us five percent of the principal each year with an opportunity for income growth. The beauty of charitable remainder trusts is that you don’t have to be in the top one percent to afford to create one. Our charitable remainder unitrust increased our income and saved taxes: it is ideal from a financial standpoint and also enables us to affirm our values. We want Yale to continue to be fully inclusive and available to any qualified student regardless of his or her ability to pay.”

Trailblazer Endows Fellowship for Women in Science

Anne M. Briscoe ’49 Ph. D. was a pioneer. At a time when women in the sciences and medicine were rarer than today, she was a trailblazer as a noted researcher, gifted teacher, and supportive mentor to young women beginning their careers as scientists. A biochemist, she held faculty positions at Cornell, Columbia, and the University of Pennsylvania, and was elected a fellow of the American Institute of Chemists and the New York Academy of Sciences. She was also a founding member and president of the Association for Women in Science and received the Susan B. Anthony Award from the National Organization for Women.

A courageous and outspoken advocate for women in science, Anne was equally passionate in her loyalty to the Yale Graduate School of Arts and Sciences. She contributed to the graduate school in every conceivable alumni role and was recognized with its highest honor, the Wilbur Cross Medal for exceptional achievement in professional life. Anne also received the Yale Medal, the premier award of the Association of Yale Alumni, conferred to honor outstanding individual service to the university.

Anne’s unstinting volunteer service mirrored her philanthropic leadership. Chair of the Graduate School Alumni Fund for many years, she also established an endowed fellowship with a preference for women in the physical, biomedical, or computer sciences. Anne died in 2012 at age 94. This past year, the university received a substantial bequest from her estate to add to her fellowship. As a result of her generosity, new generations of women scientists will be able to continue the course she charted and followed so resolutely.

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Drs. Maura and Paul Copeland ’72, ’77 M. Phil., ’78 M. D. (right) with their children
Save the Date!
Yale Legacy Partners Luncheon
May 13, 2016
The eleventh annual gathering of the Yale Legacy Partners will be held on the Yale Campus at the Maurice R. Greenberg Conference Center.

We hope to see you there!

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.

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Endowed Scholarship (continued from page 1)

Rachel Zorn ’16 MPH

week in a volunteer role without having to get a paying job while in school. There is no more formidable experience for me at Yale than my work at the HAVEN clinic. It makes me confident of my ambition to work in a clinical setting as a public health practitioner. The Spinelli scholarship has facilitated my education and career in an invaluable way.”

Rachel planned to pursue an MPH since she was an undergraduate at the University of Wisconsin—Madison and spent a semester abroad in Kenya. After graduation, her service as a Peace Corps volunteer in Senegal, West Africa, solidified her professional goals. “I was working alongside community health workers in a rural clinic to improve the patient experience and increase access to diagnostic tests and treatment for malaria. I saw the immediate positive effects on my community’s health and productivity. “It is thrilling and motivating to now be at YSPH surrounded by knowledgeable and passionate individuals. Upon graduation, I hope to work in international public health and expand my repertoire of languages and cross-cultural understanding. Without the financial aid I receive at Yale, it would be impossible for me to envision such a future.”