Gift of Life Insurance for UBC Okanagan

Theresa Arsenault has a passion for post-secondary education in the Okanagan Valley of BC. And along with her husband Stuart Marshall, she has demonstrated that passion with a gift of life insurance to UBC Okanagan.

Theresa was born and raised in the Okanagan, and when she graduated from UBC with a law degree in 1981 she only applied for articling positions in that region. “I really enjoyed my time at UBC,” she says, “Both my arts and law degrees. When I was an English major I took all kinds of courses; anything that interested me. And some of my best friends are people I first met in law school.”

Theresa articled and practiced in Vernon, then moved to Kelowna in 1985 to join her current firm, Pushor Mitchell. There she specializes in business and estate planning law.

Theresa and Stuart first met in Grade 10, but didn’t date until Theresa was in her first year at UBC. They were married in 1982, and have a son and a daughter. Stuart is a graduate of Langara College who heads up his own real estate development company.

continued on page 2
How They Did It: Making a Gift of Life Insurance

If you share your life with a spouse and/or children, life insurance allows you to provide for them in the event of your passing. Life insurance can also offer an attractive way for you to make a substantial donation to a charity like UBC.

For a relatively modest investment of small instalments today, you can make a major philanthropic contribution in the future. This is especially pronounced the younger you are when you begin.

If you name UBC as a beneficiary of your life insurance policy, your estate will receive tax benefits. If you designate UBC as the owner and beneficiary of the policy, as Theresa and Stuart did, you can realize those tax benefits today.

You can use a life insurance policy to make a gift to UBC in one of these ways:
- By donating an existing policy that is fully paid
- By transferring ownership of an existing policy with premiums still owing
- By establishing a new policy that designates UBC as the owner and beneficiary
- By naming UBC as the beneficiary of your insurance policy.

For more information about gifts of life insurance, please contact us or your financial advisor.

Gifts from Respected Alumna Support Her Passions

Sharon Stewart had two major passions in her life: UBC and helping those who, like herself, were born with aniridia. She has combined these passions in an estate gift to the University that will support aniridia research for years to come. Aniridia is a rare congenital disease characterized by the absence or partial absence of the iris. People with aniridia are born with limited vision, which deteriorates over time until it is completely lost.

Sharon was born in 1943 to Jim and Helen Harmer. Her mother and father met at UBC, (in Gordon Shrum’s physics class), fell in love and were married in 1942. Jim became a lieutenant in the Canadian Army and was killed in action in France in 1944 before he could see his daughter.

Following her husband’s death, Helen remarried when Sharon was 11 years old, and Sharon became part of a blended family of six children. She attended UBC and graduated in 1968 with a Bachelor of Commerce. At that time, her vision was only five percent.

Sharon had a lifelong love of music; she studied piano as a child and had a lovely singing voice. She particularly enjoyed listening to Frank Sinatra and Robert Silverman recordings, and was known to quiz friends who had attended concerts and recitals.

Sharon’s friends often remarked on her excellent memory and great attention to detail. She never forgot a name or event, and had an exceptional sense of direction. As a member of the UBC President’s Circle, she attended donor events faithfully, even when her physical mobility became reduced later in life.

Sharon was always proud of her father’s career at UBC. Jim was an exceptional hockey, football and rugby player, and received the Big Block award seven times. He was posthumously inducted into the UBC Sports Hall of Fame in 1994. Sharon’s gifts to UBC Athletics honour the accomplishments of the father she never met and will help build the new UBC Sports Hall of Fame in the Thunderbird Arena.

Sharon died on June 9, 2008. Her memorial service was attended by many, many friends who remembered her laughter, optimism, love of cuddling babies and puppies, and enjoyment of sharing good food with great friends.

During her lifetime, Sharon contributed over $2.5 million toward aniridia research at UBC, including establishing the Sharon Stewart Aniridia Research Award. Her estate gift will significantly advance this research aimed at both preventing the disease and improving the lives of those born with aniridia.

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Theatre Professionals Encourage Students Through Planned Gifts

Acclaimed director Morris Panych and set designer Ken MacDonald are partners in work and life. They have collaborated professionally on over 100 projects, including two this past summer: A Little Night Music at the Shaw Festival, and Moby Dick at the Stratford Festival.

In 2001 they formed their own company, 2x2ldt theatrical enterprises, a decision that led them to consider their legacies.

Ken explains, “We had to make wills when we formed a company, so that got us thinking. We decided we would like to encourage people to stay in theatre, so we were looking for an organization to leave a legacy to.”

Both Morris and Ken are UBC alumni, although their years as students didn’t overlap and they didn’t meet until many years after graduation.

Ken recalls, “My first year at UBC was right after the Summer of Love. It was a golden time, very hippie, very anti-Vietnam war. I was a member of the UBC Musical Society and I remember that we did Hello Dolly and West Side Story.

Both men have endowed prizes at UBC. Morris in creative writing, and Ken in theatre design.

Morris explains, “Even though we were not at UBC at the same time, it’s a history we shared. We both got a lot from that institution. But it’s more than fond memories: we both believe the Theatre Department is an important and worthwhile program.

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“We think it’s important for people to give where they think their money will be used in the most useful and beneficial way, and I think that giving money to a university is just the right thing to do.”

Ken adds, “And we have felt fantastic about this decision ever since we made it.”

After graduation, Ken became a high school teacher in Richmond. One day a friend asked him to design a set for a Belfry Theatre production. “I did it, and then I did his next production, and now I’ve been doing this for thirty years.” In 2001, Ken has received a Gemini, 16 Jessie Richardson awards and a Dora Mavor Moore award for his set designs.

Morris’ first play was produced in 1982, and since then he has written, directed and acted in dozens of plays and has twice received the Governor General’s Literary Award for Drama in addition to over 12 Jessie Richardson awards and four Dora Mavor Moore awards.

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Influential Architect Supports Student Curatorial Projects

Architect, Professor Emeritus (UBC), Actor: that’s how Abraham Rogatnick sums up his curriculum vitae. Missing from this summary are co-founder of the first contemporary art gallery in Vancouver, co-founder of the Arts Club Theatre, Fulbright Scholar, Fellow of the Royal Architectural Institute of Canada, juror of art and architecture competitions, expert in the history and architecture of Venice, beloved teacher.

Born in 1923, Abraham grew up in a warm and supportive family. “In my family, education was number one. We were all top students; we loved learning.

When you make a gift to the arts at UBC, you are supporting the creative, cultural and critical work that enriches not only the UBC community but British Columbia as a whole.

Gifts to UBC’s Museum of Anthropology, Chan Centre for the Performing Arts, and Morris and Helen Belkin Gallery are popular ways to support and sustain the arts, or make a gift in memory or celebration of a loved one.

Through a gift to the School of Music, you can support the next generation of composers, musicians and singers. Supporting the Department of Art History, Visual Art and Theory encourages interdisciplinary research and creativity in art making, criticism and curatorship.

A gift to the Department of Theatre and Film encourages talented actors, directors and designers to pursue their passions.

Whatever your passion in the arts, you can find a home for it at UBC. Please contact us for more information.

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Assistant Professor in the UBC School of Architecture.

Of his 30 years of teaching at UBC, Abraham says, “I never thought I was teaching them anything. I was taking them to a market, taking them shopping in a market of ideas and knowledge, letting them browse and see what interests them.”

Over these decades, Abraham has shaped and influenced Vancouver’s skyline, parks, streets and homes, either directly or through the over 1,000 students who learned from him. Raymond Cole, Director of the UBC School of Architecture and Landscape Architecture, simply calls him “legendary”.

This year Abraham is receiving the Honorary Alumnus Award from UBC Alumni Association.

Abraham’s legacy is the Alvin Balkind Fund for Student Curatorial Initiatives, named for Abraham’s longtime partner and curator of the UBC Fine Arts Gallery from 1962 to 1973. Alvin was also chief curator at the Vancouver Art Gallery and head of the visual arts studio at the Banff School of Fine Arts.

The fund will support research and exhibition costs for graduate or undergraduate student-generated curatorial projects. “Alvin was very supportive of young artists,” Abraham says. “Here is a chance for people to get involved in arts administration; to get a boost before they graduate.”

Giving to the Arts at UBC

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Many in the UBC community were saddened earlier this year when our former Chancellor Allan McEachern died at the age of 82. Allan had a longstanding passion for UBC, particularly in his tenure as Chancellor since 2002. Born in Vancouver in 1926, Allan graduated from UBC with a Bachelor of Arts in 1949 and a law degree in 1950. He was called to the bar in 1951, and joined Russell & DuMoulin (now Fenik Martinneau DuMoulin), where he practiced for 28 years. Allan was appointed Chief Justice of the Supreme Court of British Columbia in 1979. In 1988 he was appointed Chief Justice of the Appeal Court of British Columbia. He had a reputation as a no-nonsense, get-to-the-point judge and great defender of judicial independence. In a tribute to Allan, UBC Board of Governors Chair Brad Bennett and UBC President Stephen Toope said: “UBC’s board of Governors has been fortunate beyond measure to have as Chancellor one of Canada’s finest legal minds to help in our deliberations. Allan’s experience, wisdom, integrity, and wonderful sense of humour have substantially contributed to the success of the university he loved so deeply.” Allan’s legacy will help create a new building for the Faculty of Law.

Lyle Morrison Creelman was a provincial, national and international nursing leader. Born in 1908 in Nova Scotia, she received an undergraduate degree in nursing at UBC and a master’s degree at Columbia University. Lyle worked in a variety of nursing roles in postwar Europe, including chief nurse in the British zone of occupied Germany. She was later appointed Chief Nursing Officer of the World Health Organization, a position she held for 14 years. Her visionary efforts helped ensure that countries would achieve self-sufficiency in health care, often through the introduction of primary nursing care. Lyle retired to Bowen Island and West Vancouver, where she died in 2007 in her 88th year. Lyle’s legacy gifts to UBC have established the Lyle Creelman Scholarship Fund to award scholarships to nursing students, and the Lyle Creelman Endowment Fund to fund research by the School of Nursing.

Thomas Shoyama was a prominent public servant who was instrumental in designing social services in Canada. He was born in Kamloops BC in 1915, the son of a shop owner. After graduating from UBC in 1939, he moved back to Kamloops and became editor of The New Canadian, a weekly newspaper for Japanese-Canadians. In 1946 Thomas joined the public service in Saskatchewan, helping build the prototype for the Medicare system. From 1968 to 1980, Thomas held many influential positions in the federal public service, including Deputy Minister of Finance, Deputy Minister of Energy, Mines and Resources, and a post in the Privy Council Office. One of his major responsibilities was introducing a national version of the Medicare system he had helped develop in Saskatchewan. Thomas passed away in December 2006 at the age of 90. His legacy gift to the UBC student bursary fund will help ensure that students will not be prevented from attending UBC for financial reasons alone.
Creating a Legacy at UBC

Planned giving allows you to create a specific plan to fulfill your personal giving objectives while maximizing tax benefits. You have many options for charitable giving to UBC:

- Gifts of Cash
- Gifts of Securities (Stocks, Bonds and Mutual Funds)
- Gifts by Will
- Gifts in Kind (Equipment, Books, Art and Artifacts)
- Life Insurance Policies
- Charitable Remainder Trusts
- RRSP and RRIF Funds
- Charitable Gift Annuities
- Charitable Insured Annuities
- Gifts of Real Estate
- Immediate Gifts of Future Interest in Real Estate
- International Gifts from Non-Residents

UBC’s Planned Giving Options booklet offers valuable information about creating a legacy at UBC. If you would like a complimentary copy, please contact Gift & Estate Planning staff directly or return the enclosed reply card.

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The Estate Planning Review is a newsletter that profiles planned gift issues and considerations. It is prepared for the benefit of alumni, retired faculty and friends of the University of British Columbia. Statements made are general in nature and are not intended as legal or tax advice. We encourage potential donors to consult with their legal and/or tax advisors before finalizing gifts to UBC.

Printing this newsletter on Chorus Art Silk paper saved:
- 346.67 lbs of wood
- 488.49 gal of water
- 0.5 min BTUs of energy
- 104.57 lbs of emissions
- 55.82 lbs of waste

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