

# NURSING MATTERS

## *Victors for Michigan—Champions for All*



A NEWSLETTER FROM THE UNIVERSITY OF MICHIGAN SCHOOL OF NURSING / SPRING 2014

## MESSAGE FROM THE DEAN

When the “Victors for Michigan” theme was selected last year for the new \$4 billion campaign to support the University of Michigan, we at the School of Nursing were eager to make it our own. We began by reflecting back on 120 years of leadership in nursing education, practice, and research. Our mandate would have to go beyond just staying the course, we decided, because we are now being called upon to meet unprecedented needs in a new and uncharted era of health care.

All that soul-searching was useful. We discussed the challenges ahead with stellar alumni, faculty, and students, and it became very apparent that our Victors for Michigan would be known also as “Champions for All.”

Society as a whole will benefit as our generous donors help us toward five campaign goals for the U-M School of Nursing:

- **Investment in faculty and future discovery**
- **Global engagement**
- **Education with impact**
- **Research that sustains leadership**
- **Student support that assures continued excellence**

Our “Victors for Michigan, Champions for All” give generously to empower us to do what we do best: not just to teach, research, and practice nursing, but also to integrate these three pillars of the school so that we are always learning on the edge of discovery. Watch our video on this topic at [youtube.com/UMichNursing](http://youtube.com/UMichNursing).

We want to continue to bring the struggles of patients and health systems that we encounter in practice back to the research and educational enterprise of the school. That’s how we find solutions—and create tomorrow’s scientists, nursing educators, and leaders.

Will you help? Give a gift of learning and discovery. Make the world a healthier place with a gift for *Victors for Michigan, Champions for All*.

*“...it became very apparent that our  
Victors for Michigan would be  
known also as “Champions for All.”*



Master’s student Christina Ziegler (BSN ‘09) and  
Dean Kathleen Potempa



**VICTORS FOR MICHIGAN**  
CHAMPIONS FOR ALL



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[youtube.com/UMichNursing](https://youtube.com/UMichNursing)



[pinterest.com/UMichNursing](https://pinterest.com/UMichNursing)

# *Victors for Michigan — Champions for All*

## INVESTMENT IN FACULTY AND FUTURE DISCOVERY

### PROFESSORSHIPS TO ADVANCE RESEARCH AND SUPPORT FACULTY

UMSN is proud to welcome Debra Barton RN, PhD, AOCN, FAAN, as the second Mary Lou Willard French Professor of Oncology Nursing. The French Professorship was established by the French family in 1997 to honor their beloved wife and mother Mary Lou Willard French, a UMSN alumna (BSN '52).



*Debra Barton RN, PhD, AOCN, FAAN*

“Named professorships are not only a tremendous honor for the recipient, but represent a special partnership between the donors and the faculty,” says Dr. Barton. “Endowed positions allow the faculty member to concentrate in a more focused way on their program of research that would not be possible without the donors’ support.”

*Dr. Barton is considered one of the top cancer care researchers in the country.*

Dr. Barton is considered one of the top cancer care researchers in the country. She is focused on understanding and managing symptoms such as fatigue, impaired sexual health, hot flashes and sleep disturbance, primarily through pharmacological and cognitive-behavioral treatments.

Dr. Barton replaces UMSN’s retiring French Professor, Laurel Northouse PhD, RN, FAAN, who created a legacy of research on the impact of cancer on the family and more specifically, the caregivers of cancer patients. Dr. Northouse developed a highly-successful model of care called the FOCUS program, which provides patients and their caregivers with support on understanding the disease, coping strategies, and managing treatment and symptoms.

“Having been named the second Mary Lou Willard French Professor of Nursing is an incredible honor for me for two reasons, explains



*Laurel Northouse PhD, RN, FAAN*

Dr. Barton. “First, the inspirational career of the first French professor, Laurel Northouse. Second, as the focus is in cancer care, it continues to be my passion to prevent and/or treat oncology symptoms in people with cancer to improve wellness.”

Endowed professorships are one of the most important tools for universities in recruiting and retaining high-quality, research-focused faculty such as Drs. Barton and Northouse. This objective has been and will continue to be a priority for UMSN because the support that comes with these professorships enables faculty to propel their research in new and meaningful ways. Professorships can be endowed as a permanent gift or as a term for a set amount of time. Both types serve as an honor to the appointed professor and a tribute to the person it is named for.

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*If you are interested in discussing one of the most valued gifts to UMSN, please contact the Office of Development and External Relations, (734) 763-9710 or [nursingalum@umich.edu](mailto:nursingalum@umich.edu) to learn more about endowed professorships.*

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#### UMSN WOULD LIKE TO RECOGNIZE OUR ENDOWED PROFESSORSHIPS:

- Mary Lou Willard French Professor of Oncology Nursing
- Shirley Titus Distinguished Professor of Nursing
- Suzanne Bellinger Feetham Professor of Nursing
- Rhetaugh Graves Dumas Professor of Nursing

# *Victors for Michigan — Champions for All*

## GLOBAL ENGAGEMENT

### EDUCATION BEYOND THE CLASSROOM

Dr. Ketefian's belief in the high educational value for students and faculty is the primary reason she supports global experiences. Her gifts have been used for multiple trips for faculty and students and she recently created the Shaké Ketefian Endowed Fund for Student International Experience. The first support from her official fund was used in October 2013 on a clinical immersion experience in Thailand for five master's students and two faculty members who teach nurse practitioners at UMSN. It will be used again this summer for a nursing-led community health experience in Ecuador that includes students from other academic units such as the College of Pharmacy and School of Dentistry.

"The ability to travel to Thailand was a once in a lifetime opportunity," says student Jessica Roossien. "I am so grateful for the support received from Shaké Ketefian. I experienced the challenges of delivering health care in a nontraditional setting, needing to draw on my educational experiences to apply interventions in a totally different environment and setting. I went to Thailand for the purpose of gaining clinical experience; I returned to the United States with the understanding of a completely different culture."

"Exchange visits with international colleagues enable us to engage in mutual learning, and develop an appreciation of global health issues, how social and economic factors impact on the health of citizens, and engage in comparative analyses with the situation we have within the U.S.," says Dr. Ketefian.



*UMSN students and Thai peers conduct health screenings*

every individual is a person who deserves the most optimal care."

Despite differences in culture and location, many countries throughout the world are facing similar challenges related to resource shortages, complications from natural disasters, and rising rates of chronic disease, such as heart disease and diabetes. UMSN is committed to the belief that nurses are well-positioned to address these challenges, in the United States and abroad.

That's why the school has a renewed focus on global initiatives and on leveraging an extensive global network to strengthen

partnerships and create new opportunities for innovation and health promotion. Benefactors like Dr. Ketefian are critical to our mission of supporting our students in opportunities to learn and provide care around the world.



*UMSN students and faculty in Thailand*

"Learning about different cultures and practices, medications, and procedures emphasized the importance of treating the individual and their specific practices," says Ally Stencel, a master's student who also traveled to Thailand. "Each and every clinical experience that I encountered, both challenging and rewarding, will assist me in all of my future practices as a nurse practitioner by understanding that each and



**VICTORS FOR MICHIGAN**  
CHAMPIONS FOR ALL



## U-M ALUMNI HONOR LOVED ONES WITH GIFT TO UMSN



Mike and Nancy McLelland

*“Our goal is to provide good students with the opportunity to get an outstanding education.”*

— Mike and Nancy McLelland



Nancy McLelland and scholarship recipient Hollis Wyatt

Mike (MBA '79) and Nancy (LSA '75, MBA '79) McLelland share a love for the University of Michigan, the belief that education is a key component in achieving the American dream, and a love for two family members who were nurses. The McLelland Memorial Fund was established in 2007 by Mike and Nancy to provide need-based scholarships for students interested in attending the University of Michigan School of Nursing (UMSN). The fund honors Nancy's sister, Kathleen Harris Green (BSN '74), and Mike's mother, Betty McLelland, for their love and dedication to the nursing profession.

“My sister was the first in my family to attend U-M, and I followed a year later,” says Nancy. “She always wanted to be a nurse and knew Michigan had one of the best programs in the country.”

“My mother was raised on a farm and was the first in her family to go to college,” says Mike. “She became a registered nurse which allowed her to leave the farm and move to Chicago. In the early 1950s, she went to work for TWA, where you were required to be an RN to work as a flight attendant.”

Both Nancy's sister and Mike's mother died at young ages from devastating diseases. “My sister started having symptoms of Crohn's disease when she was a senior at U-M,” says Nancy. Despite the painful, chronic condition affecting the gastrointestinal tract, Kathleen was able to practice nursing for many years and became the head nurse of a cardiac care unit. She passed away when she was only 45 years old. Mike's mother was 52 when she died from breast cancer.

To honor their memories, Mike and Nancy recently made an additional \$500,000 donation to UMSN. The gift will be used for an 80-seat, interactive classroom in the new academic building that is scheduled to open in 2015, as well as to provide additional scholarships for nursing students. “We know how important nursing care is,” says Mike. “Fundamentally, we believe the world needs more good nurses and that they will always be in demand.”

The McLellands have been long-time supporters of student education at UMSN and Michigan's Ross School of Business. “Education is important to both of us,” says Nancy. “Our goal is to provide good students with the opportunity to get an outstanding education.”

## RESEARCH THAT SUSTAINS LEADERSHIP

### SEEING THE POWER OF RESEARCH

“For nursing to continue to establish itself as a valid scientific profession, sound research is really important,” says alumna Janeth Turner. She and her husband, Amherst, have been long-time supporters of UMSN faculty and the research they conduct.

Turner saw the power of research in her own career — even though it wasn’t what she planned on. She chuckles as she recalls accepting her first job offer because “it came with a company car and an expense account. That was pretty good.”

But the position as a nurse assisting on a clinical trial became an invaluable first step in Turner’s professional life. “That opened up my whole career for me,” she says. “Because I had a very strong scientific background from my nursing degree, I was able to progress in my career to the point I was designing and leading clinical trials.”

Turner went on to hold key leadership positions during her 33-year career in the pharmaceutical industry, specializing in research and development. During this time she developed an interest in pain management. That’s one reason she’s pleased that some of her donation is supporting the work of UMSN Assistant Professor

Ellen Lavoie Smith, PhD, APN-BC, AOCN®. Dr. Smith’s groundbreaking research was the first of its kind to show an effective intervention using the drug duloxetine to manage chemotherapy-induced peripheral neuropathy, a disorder causing weakness, numbness, tingling, and pain.

“Ms. Turner is passionate about wanting to make a difference in the lives of millions of Americans suffering from chronic pain every day,” says Dr. Smith. “Her donation is helping the scientific community to learn why some women experience chronic pain following breast cancer treatment. I am truly grateful for Ms. Turner’s support because the funding is allowing us to take a step toward discovering new and better ways to prevent pain for countless cancer survivors.”

In addition to their continued support for faculty, Janeth and Amherst recently made an additional \$50,000 gift that will be used to sponsor a conference room in UMSN’s new academic building, slated to open in 2015. “I’m happy to help with the new building,” says Janeth Turner. “But for me, I really enjoy supporting the faculty because it’s important to retain good faculty, and you need good faculty for your students.”

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#### **Are you interested in supporting UMSN faculty?**

*If yes, please contact the Office of Development and External Relations, (734) 763-9710 or [nursingalum@umich.edu](mailto:nursingalum@umich.edu) and we’ll be happy to discuss your area of interest.*



*Architect's drawing of UMSN's new academic facility*

#### **DID YOU KNOW?**

Because the first-ever custom-designed building for nursing education is being underwritten by the University of Michigan, naming opportunities within the nursing academic building support not only the new building, but also programs within the School of Nursing. 75% of your naming gift can be designated to the area of your choice within the School of Nursing (scholarships, faculty support, research, etc). The remaining 25% is deposited into an endowed fund specifically for building maintenance and technological upgrades. Named spaces within the new building range between \$25,000 and \$5,000,000.

To learn more about naming opportunities in UMSN’s new academic facility, please contact the Office of Development and External Relations, (734) 763-9710 or [nursingalum@umich.edu](mailto:nursingalum@umich.edu).

## STUDENT SUPPORT THAT ASSURES CONTINUED EXCELLENCE

### A DAUGHTER'S LOVE OF MIDWIFERY INSPIRES LECTURESHIP AND SCHOLARSHIP

"I did it more for my daughter than for me, because she was very enthusiastic about midwifery," says Audrey Murtland about the decision to create a lectureship and scholarship in her daughter's name. Terri Murtland was a UMSN alumna who helped start the Nurse-Midwifery Service at UMHS in 1985. Terri passed away in 2008 after a battle with cancer.

Audrey Murtland says that even though she's a native of Pennsylvania, she was interested in the University of Michigan School of Nursing. "I never made it, but a friend of mine from high school did, and I always wished that was me. When Terri decided to go into nursing, I like to think I helped her decide it was the best place for her," Murtland laughs.

When Terri passed away, her husband suggested a lectureship in her honor. "We talked about the cost, and I was surprised to learn it was less than I thought," says Audrey Murtland. "So then I thought having a scholarship would be even more meaningful."

Since 2009, the Terri L. Murtland, MS, CNM, Lectureship and Scholarship Program has been held in October. It's where Audrey Murtland gets to meet each year's scholarship recipient. "I think they've all been very deserving," she says.

"I would not be a midwife if it was not for the Terri Murtland Scholarship," says Tanya Vaughn, CNM, FNP, the 2010 scholarship recipient. "I was a single mom with four kids and I would not have been able to finish school without the help of the scholarship. It is my passion to change the lives of women one encounter at a



*Scholarship recipients Maggie Fink, Tanya Vaughn, with Audrey Murtland*

time and I am so thankful for the opportunity to take care of my patients like Terri took care of hers."

Vaughn has returned to school to pursue her Doctor of Nursing Practice (DNP) degree. "When I get done I can't wait to be able to pay it forward to someone else. I feel so thankful for that scholarship to this very day," she says.

Now Murtland has a new goal—adding a second scholarship. She says with Michigan's Matching Initiative for Student Support's promise to contribute 25% to each gift over \$100,000, she is optimistic about reaching her goal.

*Helping our supporters create scholarships in honor of a loved one is one of our favorite endeavors. We understand how much it means to the supporters and to the students they are helping. Please contact the Office of Development and External Relations, (734) 763-9710 or [nursingalum@umich.edu](mailto:nursingalum@umich.edu) to get started.*

The Michigan Matching Initiative for Student Support offers an extra incentive for U-M donors to establish or support endowed scholarship funds. The initiative provides a 25% match to encourage new gifts of \$100,000 to \$1 million that support endowed scholarships for Michigan students. Your gift does not have to be made all at once. It can come in installments over a five-year time period, but we encourage nursing supporters not to wait too long. The initiative has a limit on funds to be used on a first-come first-served basis.

The future success of the University of Michigan depends above all else upon the quality of our students. Endowed scholarships and fellowships provide motivated students the chance to pursue their education and join with faculty in discovery and innovation.

#### DID YOU KNOW?

Grateful patients support our students and faculty at the School of Nursing. What better way to say thank you than to create a fund to support the education of nursing students!



# ANNUAL SUPPORTER CREDITS U-M'S STRONG FOUNDATION

"It's pretty good job security to save your boss's life," says alumna Susan Richards (BSN '87). That's exactly what Richards did while working as a parish nurse, when her pastor collapsed right in front of her in full cardiac arrest. "He's fine today so I can joke about it, but really I'm very grateful that I knew what to do."

This experience came soon after Richards returned to nursing following an 18-year absence to raise her three sons. "It took a little time to get back to it, but I think U-M gives you such a strong foundation, and encouraged me to be a life-long learner, so the transition back to nursing was not that difficult."



Pastor Mark and Susan Richards

Richards credits U-M for fostering her variety of interests, including her time in the marching band. "College is such an important time," she says. "It's really the foundation for the rest of your life." Susan says that's why she's been making annual gifts to UMSN for more than 25 years. "I really like the idea of being able to help provide an education and the college experience to someone who might not otherwise be able to afford it."

*"You give until you feel good.  
I don't think there's anything more  
rewarding than giving."*

— Stephen Ross, Victors for Michigan Campaign Chair

## PROGRAM SPOTLIGHT

- UMSN's Division III is now **"Systems Leadership and Effectiveness Science."** Designed for a new era in health care, its web-blended MS program (with leadership and informatics focus areas) is taking Fall 2014 applications through May 1. To learn more about obtaining the skills to lead interprofessional teams in complex environments, assess the impact of health and communication technology, and improve efficiency of health systems and organizations, visit [nursing.umich.edu/leaders](http://nursing.umich.edu/leaders)

- **"Systems Information Technology for Research"** is the fourth course in UMSN's online Certificate in Clinical Research Management program, now concluding its first year. The course begins in early April (there may still be time to enroll if you contact us right away at via phone 734-763-5985 or email at [UMSN-ClinResearchCertificate@med.umich.edu](mailto:UMSN-ClinResearchCertificate@med.umich.edu)). The four-course program starts running again from the beginning in late summer, to jumpstart careers of people who want to work in the growing field of managing potentially lifesaving research. Consider joining us then!

## FACULTY MEMORIALS

Associate Professor Emerita **Marjorie Jackson** served as Director of Nursing at the University of Michigan Hospital. She helped develop the university's Clinical Nursing Specialist graduate program.

**Samuel Schultz II** was a UMSN professor in the 1960s and 70s, specializing in research, statistics, and the development of informatics. He also served as the primary faculty for support of research initiatives.

Associate Professor Emerita **Linda Lee Daniel** was known for her significant contributions to community health nursing, including the development of UMSN's community health curriculum in both the undergraduate and graduate programs.

## SAVE THE DATE

**Mark your calendar for this year's alumni reunion  
on Homecoming weekend October 30 – November 2.**



# *Victors for Michigan — Champions for All*

## MESSAGE FROM THE DIRECTOR OF DEVELOPMENT

### COLLEEN ZIMMERMAN

Alumni and Friends,

Please allow me to take this opportunity to introduce myself. My name is Colleen Zimmerman, and I am the Director of Development and External Relations for the School of Nursing at the University of Michigan. I am often asked what my job entails. My answer? I am your chief fundraiser.

I have been in development, or fundraising, for many years. It is my profession, passion, and love. Nothing is more satisfying to me than to help someone through the process of establishing a fund, or putting plans in place, to support the University of Michigan and especially the School of Nursing. I do not beg, nor do I strong-arm individuals into supporting the school. Why? Because there is no greater honor than to be a part of someone's decision to help others, to create a lasting way to remember a loved one or simply give back because of the impact the school had on a life.

Several years ago when I was talking with Dean Potempa about the possibility of making a move to the School of Nursing, I was impressed by the passionate way she spoke about the field of nursing: the work, research, breakthroughs, students, faculty, and alumni. She told me of her plans for the school, which included a new academic building, the first building custom-designed for nurses in the history of nursing at Michigan. It did not take long for me to decide that I wanted to be a part of this institution.

If we meet, I will likely ask you this: If money was not an object, where would you find yourself making a difference at the School of Nursing?

- Would it be to create one more nurse practitioner?
- What about helping to support research in chronic pain?
- Would you like to provide funding so the dean can help send a student home when there is a family emergency?
- How about creating a professorship so one of the school's outstanding faculty members could ensure her or his work is funded and have the prestige of a named professorship?
- Would you support a faculty member and students to travel abroad to work with midwives in developing countries?

All these questions represent direct examples of how private philanthropy supported the school in the last two years.

Your support of the School of Nursing is important, relevant, and needed. I welcome all conversations about how to support the School of Nursing, now and in the future. You will find our conversations easy. Supporting the school should be one of the most joyful parts of your life and provide you with a deep sense of personal satisfaction.

The future of our nation's health care rests firmly on the shoulders of nurses. Come be a part of creating the highest qualified nurses in the country: University of Michigan nurses. Come be a Victor for Michigan and Champion for ALL.

Kind regards,  
**Colleen Zimmerman**



*School of Nursing Development staff,  
Jodi Smolek, Director Colleen Zimmerman, Amanda Smith*

















# Victors for Michigan — Champions for All

## THE POWER OF ENDOWMENT

Endowment funds are invested for the long-term. There are hundreds of endowed funds at U-M. You can designate the purpose of your endowment and earnings from those investments will grow over time to fund your philanthropic priorities forever.

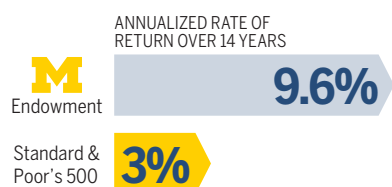
### WHAT YOUR ENDOWED GIFT CAN DO

GIVING LEVEL	GENERATES ABOUT*	THE POSSIBILITIES			
\$1,000,000 >>> \$45,000/year		OR		OR	
	Pays full cost of attendance (~\$38,000) for in-state graduate student.		Pays full tuition (~\$40,000) for out-of-state undergraduate student.		Pays full tuition for 3 in-state undergraduates.
\$250,000 >>> \$11,250/year		OR		OR	
	Pays nearly full tuition (\$13,000-\$15,000) for in-state student.		Pays housing for undergraduate student.		Attracts top master's student with \$22,500 tuition grant.
\$100,000 >>> \$4,500/year		OR		OR	
	Covers 1/3 of undergraduate student's in-state tuition.		Reduces undergraduate student's total loan burden by \$18,000.		Pays international travel expenses.
\$50,000 >>> \$2,250/year		OR		OR	
	Slashes undergraduate student's total loan burden by \$9,000 over 4 years.		Pays for educational experiences such as internships or travel.		Reduces Ph.D. student's costs by \$9,000 over 4 years.

### VICTORS FOR MICHIGAN CHAMPIONS FOR ALL



#### A HEALTHY INVESTMENT



Since U-M established its investment office 14 years ago.

**4.5%**  
payout rate from the endowment

### HOW A GIFT GROWS:

#### THE MARY RAYMOND CREER SCHOLARSHIP



Mary Raymond Creer

The Mary Raymond Creer Scholarship was created in 1983 with a gift of \$2,668.75 by Mrs. Creer's brother and sister-in-law, Anson and Marian Raymond. The scholarship honored Mrs. Creer and her career as a maternity nurse.

Over the years, Anson and Marian made additional contributions. In 1991, after their final contribution, the Creer Scholarship Fund was at \$57,000. Now, the fund has grown to \$247,310.50.

# GIVING 101

Giving beyond the annual gift is not complicated, but many are unfamiliar with how to support the School of Nursing in a more significant way.

The School of Nursing's endowed funds are part of the greater University of Michigan's endowment, which is managed by Timothy P. Slottow, U-M executive vice president and chief financial officer and his team, including L. Erik Lundberg, the U-M chief investment officer. The school's endowment is made up of over 60 funds that support professorships, student scholarships, faculty research, and other initiatives important to the donors. The school's endowment provides financial stability, which is why our fundraising efforts are so important to the school's future.

## What is an endowed fund?

*A fund created by a gift in which the principal remains intact and is never used; a portion of the earnings are used to support a program, scholarship, or other designation as specified by the donor; any earnings beyond the portion used to support the designated purpose are reinvested to hedge against inflation and build the principal to ensure a lasting vehicle of support.*

## Does my gift have to be used to create an endowed fund?

*No, a gift can be used immediately by creating an expendable fund.*

## Will my money be used for something other than what I intended?

*A donor specifies how a gift is to be used at the time a gift is made and the purpose is detailed in a gift agreement. The gift agreement is kept on record and used as the document of reference in perpetuity.*

## Can I make a gift over a number of years or does it have to be made in a lump sum?

*Gifts may be made in a lump sum or in annual installments for a period of up to 5 years.*

## Can I make a gift anonymously?

*Absolutely! We have many donors who make gifts and do not wish to be identified.*

## Why does UMSN need an endowment?

- *To provide a stable and independent source of income solely for the use of the School of Nursing*
- *To sustain programs during difficult economic times*
- *To capitalize on opportunities for growth or strategic expansion*
- *To be able to respond quickly to critical and urgent needs*
- *To take on new ventures*

## Why would I create an endowed fund?

- *To ensure the school will continue to meet the needs of future generations*
- *To give back in appreciation for the gifts you've received*
- *To honor or memorialize a loved one*
- *To honor the nurse who provided excellent care*
- *To create a legacy*
- *To provide deep personal satisfaction*
- *To inspire change*

## The many ways to make a gift

### Appreciated Securities

Gifts of publicly traded securities that have appreciated in value allow you to avoid capital gains taxes while also claiming a charitable deduction for the full market value of your gift. Securities must have been held for at least 12 months to qualify for gifting without penalty. Gifts of securities are simple, convenient and the tax benefits of giving them outweigh the benefits of selling securities then donating cash.

## What does my broker need to know if I want to make a gift of securities?

University's Official Name:

*Regents of the University of Michigan*

Tax-Identification Number:

*38-6006309*

## Corporate Match

Don't miss the opportunity to take advantage of a corporate matching gift program. Your gift may double or even triple in value as a result of a matching gift! Check with your company's human resources department to find out if your company will match your gift.

## IRA or 401K/retirement plan assets

Assets in these accounts grow tax-free over time but have significant built-in tax liability. When these accounts are passed on to children or someone other than a spouse, the combined income tax and estate tax may be more than 65%. In most cases it is better to provide a benefit to the School of Nursing by naming us as beneficiary.

## Is the IRA Charitable Rollover still available?

The IRA charitable rollover expired on December 31, 2013. The rollover has historically been part of the "extenders package" that Congress renews for one or two years at a time. Congressional leaders indicated that an extenders package would not be passed prior to 2014. As a result, the IRA charitable rollover has not been reauthorized for 2014 and beyond. We will update our website if the benefit becomes available.

## Unitrusts

A charitable remainder unitrust is a way to support the School of Nursing and you receive an income, for a number of years or for life. Payout is based upon the current market value of the principal and a charitable remainder unitrust has the potential to increase in value over time resulting in a greater gift to the School of Nursing at the end of the life of the trust. A minimum investment of \$100,000 is required.

## Annuities

A charitable gift annuity allows you to make a gift to the School of Nursing which provides a secure and fixed income to you for life. An annuity may be created with cash or securities of \$10,000 or more.

## Bequest

A bequest is simple and a very popular way to leave a legacy to benefit the School of Nursing.

Just a few sentences in your will or trust is all that is needed. For example:

"I give, devise, and bequeath to the Regents of the University of Michigan, a Michigan constitutional corporation having the control and management of the University of Michigan, (a) the sum of \$\_\_\_\_\_, or (b) \_\_\_\_\_% of my estate, or (c) real or personal property herein described, to be used for the benefit of the School of Nursing at the University of Michigan."

## Should I consult with my attorney, tax and/or estate planning professional?

*Indeed you should always seek guidance from a professional who is knowledgeable about your affairs.*

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We are fortunate the University of Michigan has a multitude of resources we can utilize to help you and your family when making philanthropic decisions. Although we cannot replace good tax and legal advice, we can guide you through the process of how to make a gift, which area is a priority to support, what area is of interest to you, and we can make sure you are comfortable every step of the process. Just let us know how we can help you help the University of Michigan School of Nursing!

Your School of Nursing Office of Development and External Relations Team

**Colleen Zimmerman**

**Amanda Smith**

**Jodi Smolek**

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nursing.umich.edu/info/alumni-friends/contact-us



**VICTORS FOR MICHIGAN**

CHAMPIONS FOR ALL

**Victors for Michigan – Champions for All campaign committee:**

Carol Ann (Chair) and James Fausone, Jane Barnsteiner, Janet Gatherer Boyles, Margaret Calarco, Ellen Heid Elpern, Bonnie and Lawrence Hagerty, Carol and Edward Lake, Nancy and Michael McLelland, Barbara Medvec, Judith and William Waterston, Gail Warden.

**Regents of the University of Michigan:** Mark J. Bernstein, Julia Donovan Darlow, Laurence B. Deitch, Shauna Ryder Diggs, Denise Illitch, Andrea Fischer Newman, Andrew C. Richner, Katherine E. White, Mary Sue Coleman, *ex officio*.



## IN THIS ISSUE:

### GIFTS OF LEARNING AND DISCOVERY



## UPCOMING EVENTS

**MAY 3**

**Commencement**

1 p.m., Hill Auditorium

**OCTOBER 30 – NOVEMBER 2**

**Homecoming Weekend**

**OCTOBER 31**

**UMSN Homecoming Luncheon**

(all alumni are welcome)

Please visit [nursing.umich.edu/info/alumni-friends/reunions](http://nursing.umich.edu/info/alumni-friends/reunions) for more details

