

# Heritage

A newsletter for members of the Mary Washington  
Heritage Society and special friends

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## Quality and Value for Life



**Diana Rupert Livingston '71 remembers the late '60s and early '70s as being a tumultuous time. She says people were marching and joining causes. As the Class of 1971 nears its 40th reunion, her classmates now are preparing to regroup, reconnect, and reminisce.**

"During our years at Mary Washington, we often celebrated joyful occasions and supported each other through difficult times," she says. "Through it all, we created unique friendships with amazing women, and those relationships continue today."

Diana Rupert Livingston '71

Diana resides in Port St. Lucie, Fla., where she is the general manager for 1,200 employees at one of three call centers in the country for the nationally known, multi-media retailer QVC. She says she utilizes her Mary Washington education every single day, including the fundamentals of grammar learned from her freshman English teacher and the passion and curiosity for the human personality inspired by her psychology professor. "I majored in sociology at Mary Washington," she says, "and, with my position at QVC, communication and people are now my business."

Originally from Westminster, Md., Diana says she immediately fell in love with Mary Washington when she visited the campus with her parents in the late '60s. "Mary Washington has always been a beautiful place," she adds, "but the fact that it has sustained academic excellence over time – and that it continues to attract smart women and men – is a source of pride for me."

After the passing of her mother, Martha Sadler Rupert, in 2000, Diana contacted UMW to establish a scholarship.

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## Quality and Value for Life

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Diana posed in a birdbath for her senior photo at Mary Washington.

Diana continued to stay in touch with her alma mater through the *UMW Magazine* and various newsletters, and says she was honored to accept a position on the UMW Foundation Board. Recently, she took another "logical step" in the progression of her life. She contacted the UMW Office of Gift Planning and made arrangements through her estate plans to create a trust for Mary Washington. "The arrangements were easy," she says. "When the time comes, I trust the University to utilize these funds where they are most effective in helping students in need."

While dedicated to her work and loyal to Mary Washington, Diana also is active in numerous charitable organizations, including the United Way, Big Brothers Big Sisters, and programs related to literacy and the protection of battered women and children. In 2008, Diana was presented with the President's Volunteer Service Award from President George W. Bush.

"My mother was a bright and caring educator, and she really believed in the power of learning in helping to enrich life and to be able to navigate in this world. I directed funds from her estate to create a scholarship to help deserving UMW students meet their educational expenses."

### Heritage Society Recognition

There are many ways to plan your estate so that your legacy continues in a way that pays tribute to you and your loved ones while supporting the next generation of students at Mary Washington.

If you have already made arrangements to include Mary Washington in your will or other estate plans, please contact the Office of Gift Planning so that the University can acknowledge you and ensure your wishes are honored.



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## Trotting Toward a Lasting Legacy



Brooke Kemp Berthelsen '00

Brooke Kemp Berthelsen '00 says her bachelor's degree in history provided necessary credentials and a foundation for her career. Ironically, a general education class and an extracurricular activity had a profound impact on her personal and professional life.

Originally from Fairfax, Va., Brooke says Mary Washington was the only school she ever wanted to attend, and once a student she looked for any opportunity to get involved. For two years, she served in the student senate as a representative and also argued two cases as a student advocate in front of the Honor Council. "It was an extraordinary experience," she says. "The Honor Council was, and still is, an institution that deserves great respect. Participating in the deliberations was a powerful experience that shaped my role as an advocate for the non-profit industry."

While she enjoyed the campus experience and found the residence

halls warm and welcoming, one of her favorite classes was off campus at Hazelwild farm. "I took riding lessons during my freshman and sophomore years to meet physical education requirements, and it was a true joy," she says. "Mary Washington was the first opportunity I had to ride, and the classes later inspired my family to take lessons together, which brought us closer. Today, my parents own a horse; and, in a few years, my mom plans to teach my son, Forrest, to ride as well."

When she wasn't riding horses or advocating for students, Brooke studied history and was inspired by Professor Bruce O'Brien. "He was a motivating teacher with a unique perspective that made history a dynamic field of study," she says. "Professor O'Brien was instrumental in my decision to major in history."

**Brooke Kemp Berthelsen '00 designated UMW as a primary beneficiary of her IRA.**

For that first job after graduation, however, Brooke gives partial credit to an elective class in digital design. "The skills learned in digital design provided me with a unique skill that got my foot in the door. That expertise, along with the research and writing skills honed in my history classes, led to my first professional job as a magazine editor for the National Concrete



Brooke plans to share her interest in Mary Washington and horses with her son, Forrest.

Masonry Association," she says. "During my years there and later on during my graduate studies, I built on the educational foundation that originated at Mary Washington."

This in-the-trenches experience led to a position with the National Rifle Association headquartered in Fairfax, Va. Now the assistant director of planned giving for the NRA, Brooke says she continues to use the skills and experience she developed at Mary Washington in her personal and professional life.

"After Forrest was born in 2009, my husband, Alexis, and I reviewed our estate plans," she says. "We each made a will, purchased life insurance, and set up a trust for our son so we wouldn't have to worry. During our planning, we knew supporting charity would be a component of our plans. As a result, I added UMW as a primary beneficiary of my IRA. The process was simple and didn't cost us anything to change."

Brooke says Mary Washington helped her begin her career, and she is honored to be a part of the UMW Heritage Society. "Providing for the University's future is one way I can leave a lasting legacy and assist other students in laying the foundation for their careers."

## Live and Give Within Your Means

**Do you have a will? If so, is it current? Statistics suggest more than half of all American adults do not have a will or any type of formal estate plan. This seems to be true for multimillionaires and even those of less means. However, it is really quite simple to make an estate plan.**

With just a few words, you can take care of your family, your friends,

and the organizations and causes most important to you. By doing this now, you can ensure a legacy that will carry on your passion for good work.

The past several years have been challenging for many, and some have delayed or even stopped charitable giving. A will is an excellent way to give today without giving anything away. By including a charitable cause in your will, you can make a meaningful gift knowing you can live your life

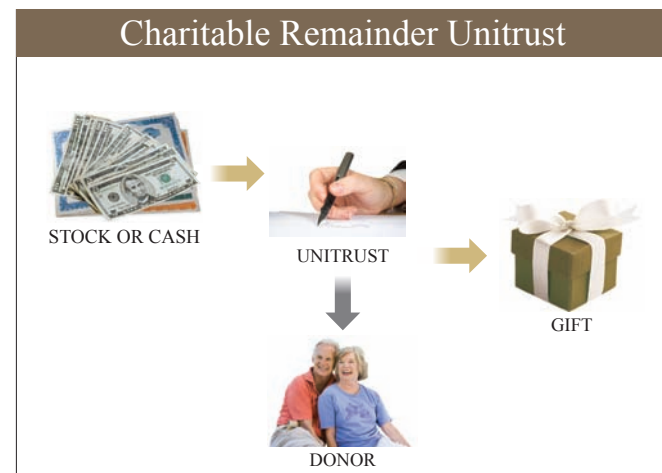
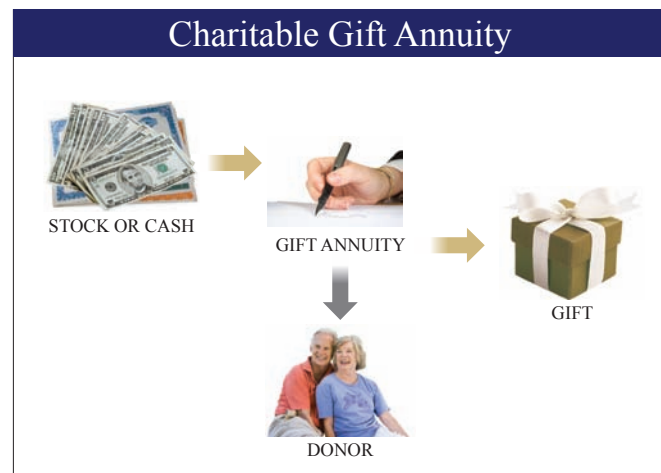
without sacrificing anything.

If you have already included Mary Washington in your will, please contact the Office of Gift Planning so that we may recognize your gift. Whether your will is new or in the process of being revised, proper wording is very important to ensure that your wishes can be honored. Contact the UMW Office of Gift Planning at (540) 654-2064 or [jclarke@umw.edu](mailto:jclarke@umw.edu) for more information. We want to help you accomplish your goals and wishes.

### Do you want to make a gift that keeps on giving?

Consider one that provides income to you for years to come:

1. A charitable gift annuity with fixed payment rates as high as 9.5 percent.
2. A charitable remainder unitrust where you set the payment rate and have more control.



## UMW Connects With Estate Planners



The UMW Office of Gift Planning regularly holds conferences to work with business leaders in the Fredericksburg area. Attorneys, bankers, and financial planners meet at the Jepson Alumni Executive Center to share news and ideas about the latest developments in estate planning. Assistant Vice President for Gift Planning Jan Clarke also works with the group to keep them informed of Mary Washington programs

that could benefit from charitable gifts, including scholarships, the establishment of faculty chairs, and other endowments. In addition, Clarke offers guidance with legal wording and terms of agreement to ensure that donors' intentions and wishes are honored at the appropriate time. For more information about this group or about other estate planning needs, contact the Office of Gift Planning at (540) 654-2064 or [jclarke@umw.edu](mailto:jclarke@umw.edu).

**Even if your stock is worth less than it was two years or 10 years ago, it still is worth more than you paid for it. The upcoming tax increase could impact you.**

## Make Plans Before Year End

Just as it always does, the calendar year ends on December 31. However, this year, you may also see an end to the opportunity to take advantage of lower tax rates. The tax cuts passed a few years ago are set to end with 2010.

On a practical level, this means it may be more expensive for you to sell stock in the new year. Even if your assets have fluctuated in value in 2010, they still are probably worth more than you paid for them. That means the change in taxes is something you should consider in your overall estate planning.

If you are concerned about paying higher taxes on the sale of your appreciated property, consider using your stocks and other appreciated assets to fund a charitable remainder trust or charitable gift annuity before year end. The charitable remainder trust bypasses capital gains and gives you tax-advantaged income for life or for a term of years.

The gift annuity helps avoid some capital gains, and it spreads the remainder over the rest of your life. With minimal planning, you can take advantage of the current lower rates and avoid potential increases. As you look forward to the new year, do so knowing you are in control of your assets and your future.

## Back to Class



Virginia "Ginny" Schier Drury '47

Students in a UMW communications class performed and discussed issues during their social problem presentation, "Changing Tracks of Hazardous Trains."

Heritage Society member Virginia "Ginny" Schier Drury '47 of Walnut Creek, Calif., recently visited campus and sat in on a communications class.

"It was great fun," she says. "The students were well-prepared and very serious about the topic and their overall presentation."

Ginny feels communicating properly and efficiently is an important life skill. Through her estate, she has established a trust for the UMW Speaking Center to

help promote the "better use of the English language."

During her fall visit, she enjoyed seeing the new sights on campus and the changing leaves. "I always loved the feeling of being on this campus," she says. "The beautiful buildings and trees make it feel like home."

Heritage Society members are encouraged to visit campus and see students in action. For opportunities and information, contact Jan Clarke at (540) 654-2064.