



2019 Erwin Academy and Legacy Society Dinner. From left to right, Bill Ruud, President, George Fenton, Chair Board of Trustees, Jane Morris '62 and Jarrett Stull, Executive Director of Major Gifts and Planned Giving.

THE CALL OF HOME

ALUMNA CHERISHES HER CONNECTION TO MARIETTA

Marietta has always been her home — even for the three and a half decades that Jane Morris '62 lived in Chagrin Falls, a suburb near Cleveland.

Morris was recently inducted into Marietta College's Legacy Society after making contributions to the College through her estate plans.

"I grew up in Marietta," she says. "My family home was on Front Street across from the park."

Morris is the youngest of three children. Her brothers, Jim and Bill, both attended Marietta College years before she entered as a freshman in 1959 to study Home Economics.

"I was one of Miss (Lillian) Nelson's girls," Morris says. "She taught Home Ec and she took me under her wing."

When Morris completed her studies, she moved to northeast Ohio to

work for a gas company.

"I worked there for a year but I didn't like it at all so I came back to Marietta to talk to Miss Nelson," she says. "She was really kind to me and took care of me."

Nelson advised her former student that a job teaching home economics would be opening up at a Chagrin Falls high school soon because the teacher was expecting a baby.

"I said I would take it and went up there," Morris says. "I taught for 32 years and stayed for 35."

As a life-long learner, Morris continued to take college courses, earning a Master of Arts degree from Kent State University.

During one of her trips back to Marietta after her retirement, Morris met with a childhood friend, Kay Caltrider, who urged Morris to check

out the Marietta housing options that were available to her at the time. Unlike the older home she grew up in, Morris chose a new build on the outskirts of the city.

"Moving back to Marietta was an easy thing for me," she says. "It's familiar to me and there are so many different activities here that I enjoy."

As an undergraduate student at Marietta, Morris was involved in many student life activities, and was a member of the Alpha Xi Delta sorority. Marilyn Melick Green '64 was her little sister in the sorority. She also participated in cruise tours organized by Hudson Green '63.

"If you were at Marietta back in those days, you got involved," she says. "So, when I returned to Marietta, I went back into that mold. It was one of the main reasons why I came back."



PROTECTING LOVED ONES FROM UNINTENDED CONSEQUENCES

Just having estate planning documents tucked away somewhere won't serve you or your loved ones if the documents are out of date. If it has been more than three to five years since you last reviewed these documents, or if there have been changes in your life – and likely there have been – a review is warranted.

Review all the documents that will distribute assets from your estate

While a will or trust may be the core of your estate plan, substantial assets may not be distributed by your will or trust. Retirement accounts, life insurance, and some commercial annuities will be distributed to the beneficiaries you named on forms unrelated to your will. You must also review the beneficiaries on these accounts.

Reviewing your will or trust

These aspects of your will or trust require your scrutiny.

- ▶ **Family situations.** Marriage, divorce, birth or death can require a substantial change to an estate plan. Family members who should be included aren't, and others who are named perhaps should no longer be.
- ▶ **Financial situation.** An entire estate plan can be upended if there has been a change in assets or where the assets are held and how they are titled. Have you bought, sold or otherwise promised to a family member a property, artwork, jewelry or an item of sentimental value? Is this reflected in your will?

- ▶ **State of residence.** If you have moved to another state a review by a local attorney will ensure that your documents comply with the laws of your newly adopted state.
- ▶ **Health issues.** Health issues of loved ones may require revisions to your plan. Addictions, mental disease, or the onset of dementia may necessitate that a trust be established as part of the plan.
- ▶ **Tax laws.** Any review of estate planning documents should address current estate and inheritance tax laws. The substantial increase in the federal estate tax exemption may allow for a simplification of your plan. If charitable gifts are part of your plan there are certain assets that, if left to charity, can result in your heirs possibly saving on taxes.

Reviewing other documents that should be part of an estate plan

A comprehensive review of an estate plan will include documents that appoint individuals who, if you are unable, will handle your financial and medical decisions. Often the person appointed is a spouse or child. However, spouses pass away and children move away necessitating a reevaluation of those individuals named.

continue on page 3

Do it for your family

If you've procrastinated in reviewing your estate planning documents, forgive yourself. It is not something that most individuals want to do. Once your review is complete you should consult an attorney for any needed changes. If not for yourself, do a periodic review for your family so that they will have an orderly process when the time comes.

IT'S EASY TO INCLUDE MARIETTA COLLEGE IN YOUR WILL OR ESTATE PLANS

It is simple to include Marietta College in your will or estate plans. Remembering Marietta through a bequest is a wonderful way to provide for Marietta far into the future.

- If you already have a will, you can simply add a codicil, or amendment to your current will.
- If you are in the process of estate planning, it is easy to arrange for a charitable gift along with your other allocations.
- A bequest is revocable, and gives you control of your assets throughout your lifetime.

It's easy to do! And if you don't have a will, this is the time to have one prepared. Marietta can provide sample bequest language you can use with your attorney. You may designate a particular program or area of interest for your bequest, or direct that your gift become part of Marietta's endowment fund.

continued from page 1 (The Call of Home)

In addition to making a financial contribution to the College in her estate plans, Morris has also documented gifts of art and book collections.

"Remembering Marietta College in your estate plan is a great way to impact the lives of future generations of Pioneers, whether that's through gifts to the endowment or to specific programming," says Jarrett Stull, Executive Director of Major Gifts and

Planned Giving. "Jane is passionate about art and history, and she is also deeply committed to the quality education that Marietta College offers to students, and her gifts to the College reflect that."

Stull says it's a pleasure to learn the many personal reasons why alumni are so committed to Marietta College.

"I think it's extremely important to

give back," she says. "You're sharing the world as you know it, and you're also showing future generations of students that you care."

She wants her fellow Long Blue Liners to know that the Welcome Mat is always out at Marietta.

"You don't have to say goodbye to Marietta College for forever," she says. "As far as giving, you're put on the earth to serve something greater than yourself."

Written by Gi Smith



If you would like to learn more, please contact:

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THE LEGACY SOCIETY

At Marietta College, members of the Legacy Society are a very special group of donors who have included the College in their estate or life income plans. By doing so, they help preserve the quality, distinctiveness, history and tradition of Marietta College, making it available for future generations of students.

Legacy Society members believe in Marietta College's long and proud heritage, and share in its continued preservation. Securing the future of the College is not a new concept for our alumni and friends. For the past 180 plus years, the College has been shaped and nurtured by a cavalcade of individuals with clearly defined, passionate beliefs about helping perpetuate something of extraordinary value.

These individuals ensure the existence of Marietta College far into the future. Their gifts provide operating dollars, funds for capital projects, scholarships, experiential learning opportunities, study abroad, professorships and support of the many other needs of a strong liberal arts education for our students. Deferred gifts are unique in that they provide donors with the flexibility not found in other types of charitable support. Because they may enable donors to make larger gifts, sometimes a deferred gift is the only gift and/or the largest gift an individual makes to Marietta College.

Marietta College is honored to welcome the following new members into the Legacy Society.

These members documented their deferred gift between March 2018 and February 2019.

Welcoming Our Newest Legacy Society Members

- ◆ Jeffrey L., Sr. '91 and Janet Campbell
- ◆ Michael J. '74 and Janice Downey Donoghue '75
- ◆ William E. Gilman '76
- ◆ Constance Kibbee Golden '98 and R. Vance Golden
- ◆ Gregory P. '69 and Cynthia Johnston
- ◆ Rebecca Colin Leibman '70 and John Hoskins
- ◆ Daniel T. '85 and Susan L. Leonard
- ◆ George F. '67 and Lynda N. Marts
- ◆ Jane E. Morris '62
- ◆ James H., III and Mabry M. O'Donnell
- ◆ W. Merton Prunty
- ◆ Kim T. Satterfield '74
- ◆ Charles S. Taylor '70 and Kim Iconis

Learn more about the Legacy Society or how to document your estate or life income plans by contacting Jarrett S. Stull, CFRE at jarrett.stull@marietta.edu or 740-376-4446.

