

*Largest Individual Gift
To Winnipeg Charities
Left by Mrs. Alloway*

Wife of Pioneer Banker Be-
queaths \$800,000 to
City Foundation

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August 2016 Newsletter



Inspiring excellence through music

A gifted singer with a larger than life personality, **Barbara Pearce** loved helping others realize their full potential. Her legacy gift through The Winnipeg Foundation ensures her passions will continue to be supported forever.

“Even if [a person] didn’t believe in themselves, Barb always made sure she believed in them first, and that always brought them a lot of confidence and empowerment,” says Ms. Pearce’s good friend Christy Kim.

Throughout her 36-year teaching career, Ms. Pearce taught music at more than a dozen schools across the province, most recently at Prairie Rose and Kent Road schools.

Continued inside...

Supporting Indigenous students

John Burelle committed his life to improving opportunities for Indigenous students. And thanks to a Scholarship Fund established through a gift in his Will, his legacy of support will continue forever.

Friends and family remember Mr. Burelle’s dry, wry, slightly satirical humour. They remember his shiny, red Jeep and his two German Shepherd dogs. They remember his commitment to learning and education. They remember his love for the finer things in life – art, culture, literature, and good food. But most of all they remember his support for Indigenous students.

After completing his post-secondary schooling, Mr. Burelle worked in the education system – as a teacher at the university and college levels, as well as in research, education policy, and program and curriculum development – always with a focus on Indigenous students.

“He wanted to improve the socioeconomic situation for Aboriginal People and of course one of the ways we can do that in Canada is through education,” said Dr. Emma LaRocque, at the time of Mr. Burelle’s passing. Dr.

LaRocque, a Professor in the University of Manitoba’s Department of Native Studies, hired Mr. Burelle as her Teacher Assistant in the early 1980s; they remained friends for many years.



Following Mr. Burelle’s passing in 2004, an estate gift created a Scholarship Fund supporting Indigenous students at the University of Manitoba, where Burelle completed both his Bachelor and Master of Education degrees, and worked from 1981 to 1994.

Since 2009, the Scholarship Fund has supported 54 students with a total of \$151,500. The spirit of the fund is an extension of Burelle’s dedication to both the Indigenous community and the academic world.

“John would have been most pleased to know his donation has helped so many students,” says Dr. LaRocque.

Acting as an Executor

Many people are honoured when asked to act as Executor for a loved one's estate. However, serving as an Executor is often complicated, time-consuming, and stressful, particularly when you are grieving for the person who passed. Every estate comes with unique challenges and a long list of responsibilities, including:

- Arranging the funeral, which may include paying costs upfront and waiting to be reimbursed
- Listing and liquidating assets of the estate, which could include selling a home, household contents and securities
- Filing for probate
- Paying estate debts
- Cancelling phone and utility accounts; stopping pension and other payments
- Sending out notices relating to the estate
- Addressing legal issues that may arise
- Settling the accounts and fees charged on the estate
- Providing copies of the Will and Grant of Probate to beneficiaries
- Distributing assets to heirs and paying charitable bequests
- Applying for Graduated Rate Estate (GRE) status when necessary
- Filing income tax returns for the final year of the deceased's life and for every year of the estate until it is completed

Legal experts recommend seeking professional legal advice and considering the work involved before agreeing to act as Executor for an estate. Don't agree to serve if you do not feel you have the time or abilities to carry out the responsibilities, or if you feel

that it would be difficult for you to work with the beneficiaries or others involved.

If you agree to serve, you should consider engaging a lawyer/accountant to assist with the administrative, accounting and legal requirements of the estate. Keep accurate records of all your interactions with the estate in case questions arise.

Finally, remember all this when choosing an Executor for your own estate! You'll want to select someone with the time and aptitude to properly carry out your wishes.

You can find more information and resources from the following:

Seniors & Healthy Aging Secretariat
1610-155 Carlton Street
Winnipeg MB R3C 3H8
Phone: 204.945.2127
Fax: 204.948.2514
Toll-free (within Manitoba): 1.800.665.6565
seniors@gov.mb.ca

The Public Guardian and Trustee
Suite 500-155 Carlton Street
Winnipeg MB R3C 5R9
Phone: 204.945.2700
PGT@gov.mb.ca
gov.mb.ca/publictrustee

The Public Guardian & Trustee of Manitoba also provides a helpful resource booklet titled "A Legal Information Guide for Seniors." This publication provides valuable information for all individuals, regardless of age or circumstances.

The Winnipeg Foundation does not provide tax or legal advice.



Summer is a wonderful, often carefree season when we spend leisurely time doing the things we love. It's a great time to relax, recharge and reflect.

For many, this reflection involves thinking about how you can make a difference and support our community, and how you can do so in a way that's both meaningful to you, and reflects the values you cherish; it means considering your legacy.

When you make a legacy gift through The Winnipeg Foundation, you're joining hundreds of everyday philanthropists who have been leaving their footprints on our community for 95 years. Their legacy gifts have enormous impact on individuals, families and neighbourhoods in our city. Since gifts to The Foundation are endowed, legacy gifts create a permanent source of support for causes, **For Good. Forever.**

Whether you're considering a legacy gift or already have plans in place, thank you. We look forward to thanking you personally at our annual Legacy Circle reception in October.

Justice Deborah McCawley, Board Chair
Richard L. Frost, CEO



New Legacy Circle members

Since Oct. 1, 2016, the following individuals have generously left estate gifts through The Foundation. We are honoured to recognize them as members of our Legacy Circle.

Laurie Kessler
Richard Leo Symonds
Morley Blankstein
Peggy French

Martin Leonard Ringer
Phyllis May Kilpatrick
Marion Mills
Barbara Jean DuVal

Kwan Chi Kao
Shirley Sherwood
Jack and Iris Hodges

Inspiring excellence through music ... continued from front page.

"She brought out greatness in everyone which showed in her many school choir awards and achievements. Her goal in life was to help make people aware of the power of music and to awaken their souls to its beauty and in turn bring out excellence in all she inspired," Ms. Kim says.

Ms. Pearce was a talented performer. She won a number of singing awards including the Winnipeg Music Festival's Tudor Bowl and Gordon Hignell Memorial Trophy. She had lead roles in many Rainbow Stage performances. She was a member of several choirs, and regularly sang at weddings, funerals and other functions.

When she was diagnosed with Stage 4 gallbladder cancer in May 2015, Ms. Pearce had no estate plan in place; she asked Ms. Kim to be her Executor and named Ms. Kim's partner, Tony Wytinck, her Power of Attorney. Ms. Pearce was unsure what she wanted to do with her assets. Knowing Ms. Pearce's commitment to helping others and her passion for music and the arts, Mr. Wytinck suggested creating a legacy through The Foundation.

"Until we presented The Winnipeg Foundation idea, up to that point [it] was very difficult. [That changed] once we presented her with the idea of a [creating a] legacy. That's when she opened up," Mr. Wytinck says.

Ms. Pearce passed away in July 2015. Her legacy will continue through the Barbara Pearce Arts and Culture Community Fund.



Barbara Pearce with one of her Winnipeg Music Festival awards.



Jaime Kyle
Legacy Services
Coordinator

Meet Jaime Kyle

This spring, Jaime Kyle joined your Donor Services team as Legacy Services Coordinator. Jaime replaces Victoria Anderson, who retired in June.

Jaime comes to us with a Bachelor of Commerce and experience working in communications and administration. Most recently she held a position at Manulife Bank & Trust as a Banking Consultant.

Jaime will provide administrative support to the Legacy Services team as well as participate in planning The Foundation's annual Legacy Circle event. Jaime looks forward to meeting the special people who are remembering the future of our community with a legacy gift through The Winnipeg Foundation.

The 8th annual Legacy Circle Celebration is Oct. 5, 2016

Mark your calendars! Not only is the annual Legacy Circle Celebration our chance to honour you – the special people who have remembered our community with a gift to The Foundation in your estate plan – but it's also your chance to meet other caring citizens.

This year, The Foundation is hosting a luncheon on Wednesday, Oct. 5 from 11:30 a.m. to 3 p.m. at RBC Convention Centre.

The Legacy Circle celebrates both individuals who have left legacy gifts, and those who have shared their plans to do so.

Our annual Legacy Circle event allows us to personally thank and recognize those who have made meaningful gifts. If you're a Legacy Circle member, watch for your formal invitation this fall.



For more information:

Pat Lilley, CFRE
Legacy Circle Convenor
204.944.9474 ext. 228
plilley@wpgfdn.org

For information about legacy gifts or gifts in general, please contact:



Leslie Weir, ACFRE
Director of Family Philanthropy
204.944.9474 ext. 246
lweir@wpgfdn.org



Kathryne Cardwell, CFRE
Gift Planning Associate
204.944.9474 ext. 258
kcardwell@wpgfdn.org



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www.wpgfdn.org

204.944.9474

TF: 1.877.974.3631

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