Winter is making a fast approach, and the brisk air is adding a spring to the steps of the students, faculty, and staff busily making their ways across campus. The University community has incorporated the exhilaration of the Time to Shine celebrations into its many other activities, reflecting upon the generosity of so many of you. Homecoming Weekend, which occurred the second weekend of November, featured — for the 5th year in a row — a focus on Arts & Culture at Penn. Also that weekend, this Office offered a seminar on Pet Trusts, how to ensure that your companion animals are cared for when you are no longer able to do so. Contact us for more details; we have information we’d love to share with you. The 2013 Harrison Society luncheon was held in June, a later date than usual, to coordinate with the variety of end-of-Campaign celebrations, and a record-breaking crowd attended — to socialize with each other, to catch up with Gift Planning and other Penn staff, and to hear Penn Executive Vice President Craig Carnaroli present highlights of some of the University’s exciting new initiatives. For the 2014 Harrison Society luncheon, we will be back to a more traditional April date. Mark your calendar now for April 9, 2014, to join us for the luncheon, this year featuring Dr. Gutmann. As always, we look forward to seeing you — on campus, near your home, or at a Penn event — during the coming months. Please let us know how we can assist you in your charitable planning, and thank you for your support.

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This year Penn’s Office of Gift Planning invited attendees to learn more about the caring side of planning. Planning for the future of our loved ones—our furry and feathered loved ones. Our pets are very real members of our families and it is important that we take the necessary steps to ensure their welfare. A Pet Trust can be one way to address this issue while achieving further planning goals.

For more information and to see if a Pet Trust is right for you, contact us at 215.898.6171 or 800.223.8236.

Edward Brown and wife Susan Garber understand that a quality education comes at a cost. Proud and thankful for their Penn education, the couple are longtime members of The Benjamin Franklin Society, and have consistently supported their milestone class reunions. “However, now retired and thinking from the perspective of our estate, we wanted to give back to Penn something more substantial than our annual contribution,” the couple said. They earmarked Ed’s 50th reunion to demonstrate their appreciation, and decided to fund a gift to the Class of 1962 Scholarship as a way to maximize the impact of their giving.

The University’s Office of Gift Planning worked with Ed and Susan, providing them with an array of gift planning vehicles that would help structure their gift in a way that maximized the benefits to them and to Penn. Establishing a Charitable Remainder Unitrust proved to be a nice fit, delivering appealing versatility. Their unitrust will provide lifetime payments that will supplement their retirement, and the remainder of their gift will go to the 1962 Class Scholarship Fund, ensuring a world-class education for future generation of Penn students.

As participants in Penn’s gift planning programs, Ed and Susan are now new members of the Charles Custis Harrison Society.

IF YOU THOUGHT HOMECOMING WAS ALL ABOUT FOOTBALL…. YOU WERE MISTAKEN!

Edward Brown, W’62 and Susan Garber, WG’80

“A quality education should not be available only to those who can afford it, nor should students have to incur huge amounts of debt—which might result in their taking a job based on the need to repay loans rather than a love for their chosen career.”

— Edward Brown and Susan Garber

““The used key is always bright.”

—Benjamin Franklin

HARRISON SOCIETY LUNCHEON – SAVE THE DATE

This year’s Harrison Society luncheon promises to be a memorable one! Mark your calendar for Wednesday, April 9, 2014.

Harrison Society
University of Pennsylvania

800-223-8236 | 215-898-6171
giftplanning@dev.upenn.edu
www.giving.upenn.edu/giftplanning

Penn Office of Gift Planning

Helping You Make a Difference

“From the University of Pennsylvania Harrison Society
Winter 2013"