



THE UNIVERSITY OF BRITISH COLUMBIA

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Estate Planning Review | 2019

Building Legacies for Higher Education

UBC Alumni Give Now to Enhance the Future

Barbara Dabrowski and Robert Shepherd spent their lives making engineering more sustainable and recently endowed an award at UBC that will assist engineering graduate students in perpetuity.

PHOTO CREDIT: MARTIN DEE

Husband and wife team Robert Shepherd (MEng '79, BAsC '69) and Barbara Dabrowski (MAsC '81, BAsC '78) share more in common than thriving careers in environmental engineering. They both credit their education with helping them to have a positive impact on society.

To support the program that started their careers and pay it forward, Barbara and Robert donated funds to create and endow the Dabrowski and Shepherd Award in Environmental Engineering. By endowing this fund now, Barbara and Robert get to witness the impact of their support and to hear the stories of the graduate students they support. Barbara and Robert have also left a significant legacy in their wills that will expand this award significantly through their estate.

"We're grateful for the foundation that engineering gave us for our success," explains Barbara. "We want to give back so that young people who might not have a chance otherwise can pursue a Masters."

Barbara and Robert met when they were two of only three students in one of the earliest cohorts in the Master of Environmental Engineering Program at UBC. They graduated when environmental engineering was an emerging field and industries and governments were just beginning to consider how to minimize negative environmental impacts.

"For the first time, new government regulations were being put in place," says Robert. "A whole field opened up in environmental engineering that didn't exist before."

The couple enjoyed successful, although different paths in the field. Robert worked in industry, consulting and the federal government, while Barbara's career spanned industry, government and education. Since starting out in the profession, they have seen huge changes in how industries operate and advances in sustainable engineering practices.



"We hope the award will put others in a similar good position to start their careers. We hope it will encourage them to pursue the field regardless of their financial circumstances."

— Barbara Dabrowski

BARBARA DABROWSKI AND ROBERT SHEPHERD |

PHOTO CREDIT: MARTIN DEE

"We think environmental engineering is important and it has the potential to become even more important than it is today," says Robert.

Barbara and Robert will leave a legacy that will impact the lives of graduate students in engineering for decades to come.

"We hope the award will put others in a similar good position to start their careers," says Barbara. "We hope it will encourage them to pursue the field regardless of their financial circumstances."

Blended Gifts

"We want to leave a legacy we're both connected to and like the idea of supporting young people."

Robert Shepherd

As Barbara Dabrowski and Robert Shepherd have shown in our cover profile story, a **blended gift** has worked effectively to help them achieve their goal of inspired philanthropy to UBC. During their lifetime, they have set up an endowment known as the ***Dabrowski and Shepherd Award in Environmental Engineering*** and they have also made a provision for a gift in their will to augment their award.

Blended gifts incorporate a structure where you give something now, something later (gift in Will) and perhaps something in-between. They provide you with the greatest opportunity to maximize your philanthropic investment in UBC, while taking into consideration your long term financial needs. There are also significant tax advantages to giving during your lifetime and similar tax advantages when you leave a gift in your estate plans.

HERE'S HOW BLENDED GIFTS WORK



CURRENT GIFT

- Cash
- Securities
- Real Estate and Personal Property



FUTURE GIFT

- Gift in Will
- Life Insurance
- Real Estate and Personal Property
- Retirement Accounts (RRSP, RRIF, TFSA)
- Securities
- Charitable Gift Annuities
- Charitable Insured Annuities
- Charitable Remainder Trusts and Gifts of Future Interest



LONG TERM IMPACT

- Student Financial Aid
- Scholarships, Fellowships, Prizes, Awards
- Academic Endowments and Programs
- Faculties
- Research
- Collections and Equipment
- Buildings and Facilities
- Campus and Community Engagement
- Any area of the Vancouver and Okanagan campuses to support *your* passion

To learn more about about blended gifts, please contact the Gift and Estate Planning team at (604) 822-5373

Mother's gift continues inspiring legacy of the 'Birdman of UBC'

Jamie Smith spent most of his research career studying populations of small birds, particularly the song sparrow.

Over the 32 years that Jamie was a professor of zoology at UBC, he inspired countless students on exciting field trips to study birds across B.C., the Yukon and Costa Rica. His passion was contagious and earned him the nickname, 'the Birdman of UBC'.

Jamie's love of birds started young. Born in Scotland, Jamie spent his childhood discovering the diverse bird life and extraordinarily varied habitat on the Isle of Bute. His grandfather encouraged Jamie's study of birds, and childhood friends remember that even as a young boy he knew the names of different birds and taught his friends to identify their songs.

But it was on a field course in Virginia, as an undergraduate at the University of Edinburgh, that Jamie found his true calling as a field ecologist. After obtaining his doctorate in zoology at Oxford, Jamie moved to Vancouver to work at UBC, where he was one of the first faculty members to teach the Zoology field course. He remained at UBC the rest of his career, where his wife Judy also taught for 32 years, and their children Isla and Iain both attained degrees.

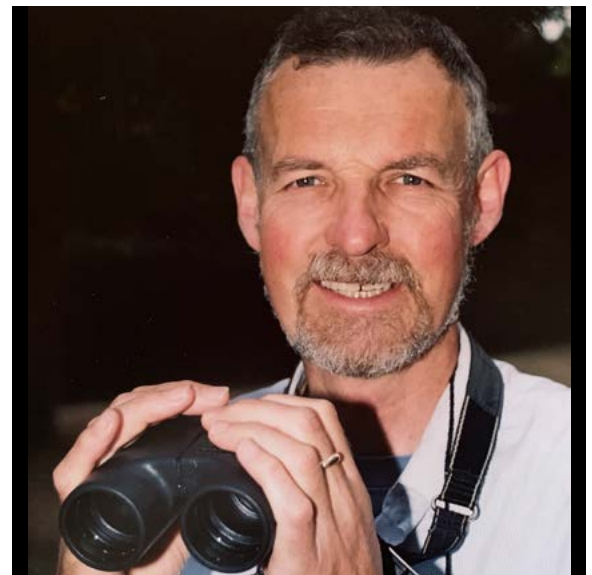
During his time at UBC, Jamie left a mark on many of his former students, who fondly remember the field trips he brought them on – whether it was making the seven-kilometre trip by boat to participate in research on Mandarte Island, or going on a bird count on cross-country skis in the forests above Squamish.

His parents encouraged his interests and followed his career with great pride. When Jamie died from cancer in 2005 – at 61 years of age – his mother, Margery, made a gift in her will to augment the Jamie Smith Memorial Award, which has been awarded annually to zoology students at UBC since 2006.

Margery led a rich and varied life. She completed her MA at Glasgow University where she met her husband David Smith. During WWII, she worked with the Women's Air Force (WAAF) as a radar operator and became an officer. Margery and David lived in Nigeria in the late 1940's; after returning to Scotland in 1957, Margery became a special needs teacher until her retirement. She was a talented artist and sold her watercolors at local exhibitions, and was also known for her wonderful garden which she opened to the public for charity events. Despite health issues in her later years, she maintained her robust sense of humour until her death in July 2017 at nearly 100 years of age.



JAMIE AND MARGERY SMITH



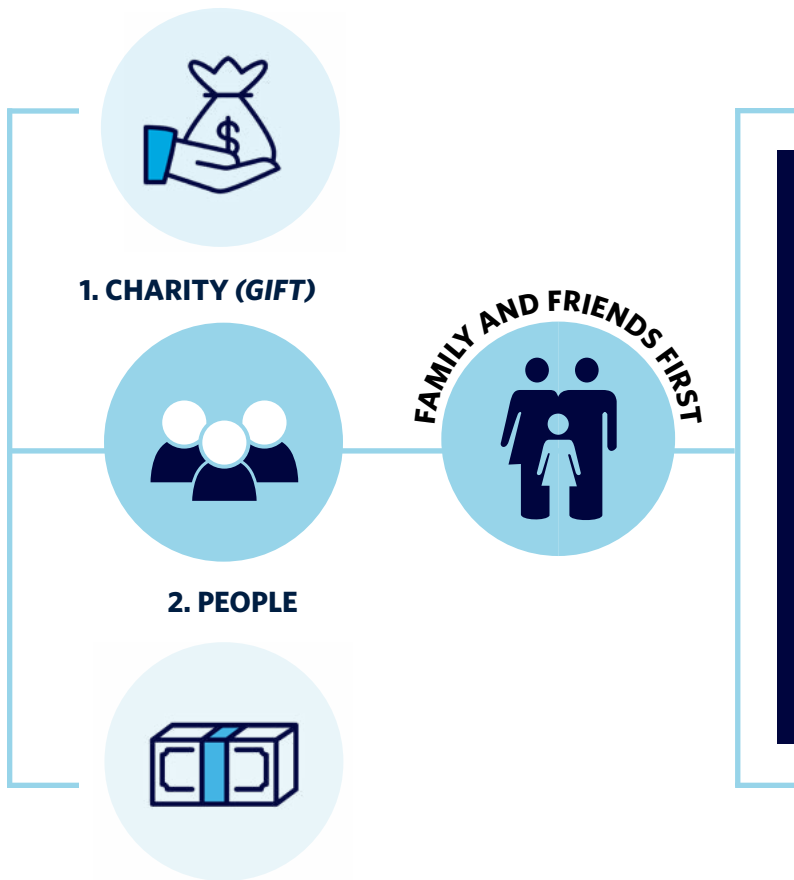
JAMIE SMITH

"She [Margery] would want other aspiring young zoologists to benefit from similar opportunities that Jamie enjoyed."

**— Liz Smith, daughter
of Margery Smith**

Gifts by Will: Planning for the Inevitable

THERE ARE THREE POSSIBLE BENEFICIARIES:



Q. After your loved ones are taken care of, what to do next?

A. Creating a charitable gift in your estate plan is a wonderful way to **contribute to the future** at UBC without having to provide the funds today.

3. GOVERNMENT (TAXES)

BENEFITS OF LEAVING A GIFT IN YOUR WILL:

- A bequest costs nothing now, and will allow you to support something you care about in the future
- You may change your will at any time if your circumstances change
- You retain control and use of your assets during your lifetime
- Your estate receives a donation receipt for use against 100% of your net income in the year of passing and in the preceding year. With recent tax changes, your estate may now also claim tax credits in subsequent years after your passing.



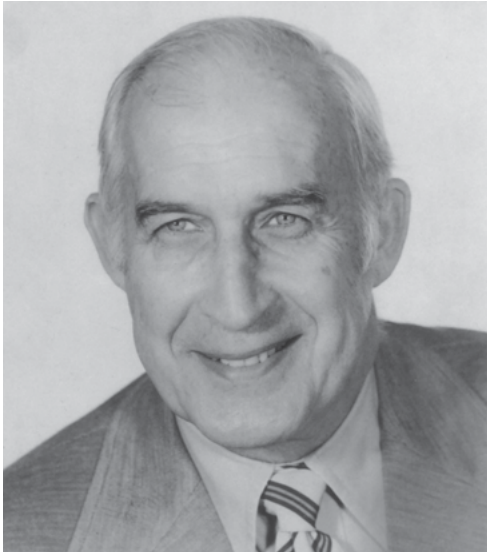
To learn more about gifts by will, please contact us at (604) 822-5373

Send the enclosed reply card (pictured)

The Gift and Estate Planning Team is here to help you plan a gift for the future.

Future gift of real estate to honour husband's memory

When Sharon Jack's husband, Bill, passed away in 1992 she began exploring a planned gift that would honour his memory. Sharon always hoped to leave something to UBC, her husband's alma mater, but was unsure if the resources she had available could make a substantial impact.



BILL JACK

When she met with her financial planner, she learned she could leave the value of her property to UBC in her will.

"I realized I could make a considerable donation," explains Sharon. "Talking to UBC, there was no sense of pressure, just an open inquiry. I decided yes, this is doable."

Sharon and Bill both valued education and shared a connection to UBC – Sharon worked as a teacher supervisor in the Faculty of Education for nearly 15 years, Bill was a graduate (BA '35 and MA '37), and two of his three sons from a previous marriage are alumni.

While studying in the Botany Department at UBC, Bill pursued leading-edge research on spring wheat strains that could grow in the harsh climate of the Prairies. He held a promising intramural fellowship at the National Research Council and later earned an MBA at the University of Toronto. Financial and family obligations prevented Bill from pursuing further graduate studies.

After finishing university, Bill instead took over his family's farm near Mission, BC, where he was able to apply his research skills and find innovative ways to improve and enlarge the retail nursery. Throughout his life, he remained committed to education, serving on the boards of several school districts in his community and retiring as Associate Dean of the Graduate Faculty of Management Studies at the University of Toronto. He eventually sold portions of the property to pay for his three sons to go to university.

"He was a very gifted and accomplished man, but not pursuing his PhD was always a lingering regret," says Sharon. "I always felt that, had life circumstances been different, he would have been a major researcher."

Sharon says Bill was a "Renaissance Man". He held active interests in academic pursuits and civil involvement, while juggling his career. Sharon wanted to leave a gift that would support research that addresses today's most pressing agriculture needs. Through her will, she established a fund to support research fellowships in the areas of sustainable farming and food production.

"This will allow a gifted researcher with limited financial means to pursue meaningful research and go in the direction that is most needed," Sharon explains.

The gift is also meaningful to Sharon because she knows firsthand the transformative impact this kind of support can have on a student's life, having received financial assistance to attend university herself.

"Education has given me a rich, full life," she says. "I was given help, and I want to help the next generation."



SHARON JACK

Giving securities is easy – and effective

A GIFT OF SECURITIES IS ONE OF THE MOST EFFECTIVE WAYS TO SUPPORT UBC.

When publicly-listed securities (such as stocks, bonds, shares and mutual funds) are directly donated to UBC, the tax on their associated capital gains is eliminated. UBC will sell the securities and direct the proceeds to your specified area of interest on campus.



When you consider the benefits of a gift of securities (a tax receipt for the full value of the donated securities, the elimination of any capital gains taxes and the ability to support an area of your choosing on campus), a gift of securities is definitely an easy and tax effective vehicle for charitable giving.

To learn more about gifts of securities, please contact us at (604) 822-5373.

With Appreciation and Thanks to Our Generous Donors

UBC is honoured to acknowledge the generosity and kindness of the following people who, in the past year, left a bequest to the university upon their passing:

Jean Rita Aitchison BEd'61
Christina Allison
Dr Gerd Asche
Joseph Zoltan Bako
BScF'59
Rex Pendril Brown
Carl Trygve Carlsen BA'57
Dr Philip Alfred Norman
Daykin BA'47, MA'49,
PhD'52
Dr Wilma Ethel Elias
PhD'56

Robert Gardner BAS'52
Albert Givton
Chiu Lin Ho
Margaret Laurence BA'47
Terry Lightheart
Dennis Doey Lytle BAS'45
Elizabeth Alice Macdonell
Dr Harry Edward McLean
MD'56
Jane Miller
Ian Hopes Morris

Rhoda Moss
Dr Norma Jean Murphy
MAsc'82
Tom Douglas Overhill
BAS'51
Brian Lloyd Patriquin
Rasheda Petersen BEd'80
Eva Lily Reshall
Else Loella Robson
Barbara Sewell
Salman Shamash
John Edgar Smith BA'52

Margery Agnes Smith
Linda Anne
Waddington
Norma Wallace
David Arthur
Watmough
Ernest Wilmot
Wellwood BAS'49
Eva "Billie" Moody
Williamson BAS'47
Gilbert John Wood
BA'54



Our Planned Giving Team would be pleased to assist



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The Estate Planning Review profiles planned gift issues and considerations. It is prepared for the benefit of alumni, faculty, staff and friends of the University of British Columbia. Statements made are general in nature and are not intended as legal or tax advice. We encourage potential donors to consult with their legal and/or tax advisors before finalizing gifts to UBC.



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