



# THE ALLEGHENY PLANNER

A Guide to Financial and Charitable Gift Planning



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**I**t radiates green under the bright blue skies on a beautiful autumn day. It shimmers like ice in the frozen dawn of a winter morning. It glows softly on a spring night illuminated by surrounding sources of light. It is the *Presence of Seven in the Light of Movement*, London-based Danny Lane's sculpture that rings Senior Circle, a landmark spot on Allegheny's campus. This sculpture was made possible through the generosity of William Bentley Legacy Society member Silas Mountsier '52. Please turn to **Page 5** to learn more about the Mountsier family.

October 2012



## Philanthropy Is Planned Generosity: Make It Your Family's Priority


**We have all heard it many times: *What a great family!***

But what exactly does this mean? In most cases, it means that family members have been intentional about finding creative ways to live out their values and improve the lives of those they touch.

Many of our alumni and friends are discovering that one of the best ways to pass their values on to their children and extended family members is to nurture a culture of philanthropy within their families.

Often it means they have been faithful stewards of all their resources — time, talent, energy, and finances. They have made it a priority to give back. These families have adopted the spirit of philanthropy in its best and broadest definition.

Many of our alumni and friends are discovering that one of the best ways to pass their values on to their children and extended family members is to nurture a culture of philanthropy within their families. Not only are they able to make a significant difference for causes dear to them — such as Allegheny — but they are also able to build stronger bonds among all the members of the family.



### Get in the giving spirit this holiday season ...

We encourage you to discuss your financial and philanthropic goals and objectives with your family when you gather together during the holidays. No one knows for sure what 2013 will bring. Fortunately, there are many charitable strategies available that can provide valuable benefits now—especially for those with significant philanthropic goals.

Discover how both you and Allegheny can benefit from creative year-end planning. Contact us today!

**Office of Gift Planning • [www.allegheny.giftplans.org](http://www.allegheny.giftplans.org)  
(814) 332-6519 • [giftplan@allegheny.edu](mailto:giftplan@allegheny.edu)**



*Trustee Herb Niles '59, William Bentley Legacy Society member, and Megan Murphy '88, past president of the Alumni Council, take some time to catch up during Reunion Weekend 2012.*

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## **How to Create a Culture of Giving in Your Family: Be Intentional in Identifying Your Own Values**

### **What are the defining values of your life?**

For most of us, the answer to this question will substantially influence almost all aspects of our lives: What we choose as our life's work, how we spend our time, the persons with whom we associate, and the causes we support. Each day, as we live out these choices, we build a culture of values that defines our lives.

Day by day — whether we realize it or not — we are building a legacy through the impact we have on family, friends, coworkers, and others with whom we interact. The more time we spend clarifying our own values, the more likely it is we will have a lasting, positive influence on the persons and organizations most important to us.

One of the best ways to get family members involved in your philanthropic interests is to let them know what you are doing and, even more important, why you are doing it. Involving family members in planning a gift can be a great way to help them develop an understanding of and an appreciation for philanthropic opportunities.

# Three Ways to Teach Philanthropic Values to Your Children and Grandchildren

The desire to give seems to be an innate quality in most people. That desire manifests in creative and powerful ways when encouraged and nurtured.

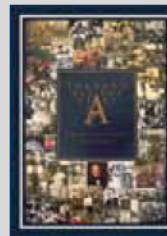
You can build enthusiasm for giving in your family in a variety of ways:

- 1. HOLD A FAMILY MEETING ABOUT PHILANTHROPY.** A family meeting that focuses on philanthropic priorities can be an excellent way to spread the spirit of giving. It can also serve as a time for families to develop a clearer sense of their collective values and formulate an action plan for shared passions. **The holidays often provide a great opportunity for discussing values and giving.**
- 2. IDENTIFY FAMILY SERVICE DAYS.** Set aside specific times on the calendar when family members can volunteer to support the work of charitable causes. The process of identifying those causes presents another opportunity for the family to discuss collective values.
- 3. MATCH FAMILY GIFTS.** To encourage younger family members or those with fewer resources to develop a habit of giving, offer to match some or all of their gifts.

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Thank you to all who responded to our survey in the April *Allegheny Planner*. We received a tremendous response and plan to use the feedback to continue enhancing future publications.



Congratulations to **Andrea Feuardent Hughes '67**, the lucky winner in our random drawing of those who completed the survey. Andrea won a signed copy of *Through All the Years: A History of Allegheny College*, by college historian and former dean Jonathan Helmreich.

We advise you to seek your own legal and tax advice in connection with gift and planning matters. Allegheny College does not provide legal or tax advice. This communication (including any attachments) is not intended or written to be used, and cannot be used, for the purpose of avoiding tax-related penalties.

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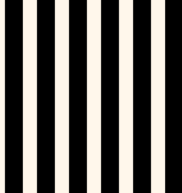
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## Yes, I want to learn more.

- Please send me your FREE guide  
*Meeting Family Needs While Satisfying  
Philanthropic Desires.*
- I would like an Allegheny College  
representative to speak to me and my family  
about making philanthropy a priority.
- I would like to learn more about the College's  
strategic plan.
- I would like information on other ways to  
support Allegheny's students and faculty.
- I have already included Allegheny in my  
will or other estate plans.

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# A Legacy of Family Philanthropy

When it comes to attending and supporting Allegheny, the Mountsiers make it a family tradition. There haven't been many days since the College's founding in 1815 when there hasn't been a member of the extended Mountsier family on campus. The most recent graduates are sisters Ryann '10 and Erin '12 Wahl.



*Steve and Sylvia Mountsier gather with their family at the graduation of Ryann Wahl in 2010.*

Steve Mountsier '52 and his brother Silas '52 have served the College as donors, fundraisers, and reunion volunteers. Steve's wife, Sylvia Thomas Mountsier '51, is

the daughter of professor and former trustee Robert W. Thomas, Class of 1912. They report that their parents taught them to give back. **"When I first graduated from Allegheny, I remember my dad ... always said, 'Now every year when they ask for money, you give them money because you got a wonderful education and you want to see that that continues,'" said Steve. He added, "I want to make sure that Allegheny College is able to provide that for future generations, not only for my family but for everyone's family."**

Silas, a trustee emeritus, is responsible, through his own generosity and by directing foundation support to Allegheny, for Senior Circle and its glass sculpture, the red brick walkways that tie the historic and modern campus together, and most of the spring daffodils. Silas states, **"I believe that, in my own Allegheny experience, the beauty of campus is part of what made me the person I am. If I can give a little gift, that's the gift I would like to give to others."**



*Silas Mountsier presents his niece Erin Wahl with her diploma at the 2012 Commencement.*

# IN THEIR OWN WORDS

Now you can watch and listen as some of your former Allegheny classmates talk about their decisions to support the College through planned giving.

Listen to our alumni describe their rewarding experiences of including the College in their financial and gift planning decisions.

Watch members of the College's Office of Development and Alumni Affairs staff briefly explain the different financial instruments you can choose to guarantee a future income for yourself, or someone you select, and support the future generations of Allegheny students at the same time.

Visit Allegheny's Gift Planning website today at [www.allegheny.giftplans.org](http://www.allegheny.giftplans.org)!



John Erak '72



Ken Robertson '65



Advancement Officer  
Andrea Bloodworth

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