



Charles Frederick Allen,
the University of Maine's first full-time
president, served from 1871-1879

Messenger

Leaving a Legacy

Creating a Tradition of Philanthropy

Many Charles F. Allen Society members have a tradition of philanthropy. Through their generosity, they pave the way for generations of University of Maine scholars and researchers to explore new frontiers and achieve ever-higher levels of success.

Thank you for your foresight by remembering the University of Maine through your will, trust or other form of deferred gifts.

University of Maine Foundation

Orono
207.581.5100
800.972.8503

South Portland
207.253.5172
800.449.2629

University of Maine
Alumni Association
207.581.2586
800.934.2586

University of Maine
Pulp and Paper
Foundation
207.581.3739

Pine Tree State
4-H Foundation
207.581.3739

News of the Foundation's 75th Anniversary Scholarship program came just at the right time for Mike '72 and Ellen '71 Flaherty of Huntsville, Alabama. They had been thinking of establishing scholarship funds in memory of Mike's father, Virgil E. Flaherty, who died in 1990, and his mother, Beatrice P. Flaherty, who died this past May. They were motivated to act when they learned that the Foundation would complement a gift of \$15,000 with a match of \$5,000 to boost a new scholarship fund to the University of Maine's minimum level of \$20,000 for a named, endowed fund. They even decided to give a gift to start the fund in their own names that they have included in their wills. By doing so, Mike and Ellen joined the over 600 members of the Charles F. Allen Society

"We are grateful that the Foundation's 75th Anniversary Scholarship Program made establishing three funds so easy," Mike said. "This opportunity allowed us to pay tribute to both of my parents, to help University



"This opportunity allowed us to pay tribute to both of my parents, to help University of Maine physics students and to start our own legacy."

— Mike Flaherty '72

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For information about the 75th Anniversary Scholarship Program, please contact Sarah McPartland-Good, director of planned giving.

2009 Charles F. Allen Society Appreciation Luncheon



Woody '51 and Virginia Beach '52



Cassandra Alley,
Music Education major, '10

The 2009 Charles F. Allen Society Appreciation Luncheon was held in the McIntire Room of the Buchanan Alumni House on September 25, 2009 with over 100 guests in attendance.

The event was highlighted with an inspiring talk by Charles F. Allen members Woody '51 and Virginia Beach '52 who shared their memories of college days and as well as what motivates them to give back to their alma mater. Woody Beach brought the message home as to why he and Virginia give to the University with a letter he received from a second year biology student. Below is an excerpt from the student's letter.

"A week ago, I was on my way to the office of Student Financial Aid on campus wondering if there was anything that could be done that would allow me to continue to study at the University of Maine. I was on the brink of having to take time off from school to work and earn enough money to be able to come back later. . . . I had been fighting against the ropes for a while trying to afford to go to school on my own. . . .

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The Charles F. Allen Society was established in 1995 to recognize and thank alumni and friends who share intent to support the University through bequests or other forms of deferred gifts. There are over 600 members of the Society (this includes deceased members).

Ways of Giving

There are a number of ways of giving that qualifies for a Charles F. Allen Society membership.

Bequest. A provision is made in the will for a charitable gift to benefit the University. (Sample language is available upon request.)

Charitable Remainder Trust. A trust is established to provide the donor (or other beneficiaries) an income for life or for a specified term, with the remainder interest to benefit the University.

Charitable Gift Annuity. A gift is made in exchange for a lifetime annuity contract providing a life income to the donor (or other named beneficiaries) with the remainder to benefit the University.

Pooled Life Income Fund. A gift is made to the University of Maine Foundaton's pooled life income fund to provide income for the life of the donor (or other named beneficiaries), with the remainder interest to benefit the University.

Life Insurance. A policy can be gifted by naming the University of Maine Foundation, the University of Maine, the University of Maine Alumni Association, the Pulp and Paper Foundation, or the Pine Tree State 4-H Foundation as owner and beneficiary.

Real Estate. A bequest of a residence, forest land, farm or a remainder interest in real property is made to benefit the University.

Retirement Fund. The University of Maine Foundation, the University of Maine, the University of Maine Alumni Association, the Pulp and Paper Foundation or the Pine Tree State 4-H Foundation can be designated as a beneficiary of a retirement fund.

2009 Charles F. Allen Society Appreciation Luncheon, *continued*

It was just then when I found out that some incredible people had given some funds to the school to help out a student in need. A great weight was lifted off my shoulders . . . Thank you a thousand times over."

Woody concluded by saying, "I think this says it all."

The student speaker for the day, Cassandra Alley, is also the director of Renaissance, an A Capella singing group of young women who entertained the guests.

Cassandra is a junior from Glenburn majoring in vocal music education who told the attendees that "without the financial aid that I receive, a fair amount coming from the Senior Alumni Scholarship Fund, I would not be able to attend this University." Cassandra went on to say, "most importantly, you help students like myself follow their passions. My greatest passion is singing. My mother told me that I could sing before I could talk. At UMaine, I am learning how to spread this passion to others. Someday, thanks to the education I am currently receiving, I will be standing in front of a choir, I will give a downbeat with my baton, and 75 voices will sound in harmony. . . . It is a day for which I am greatly excited, and a possibility for which I am unbelievably grateful."

You Never Need to Change Your Will Unless . . .

It is possible you may never need to change your plans. That is, unless you experience some of life's most common events:

- Your family makeup changes
- Your financial circumstances change
- Someone cannot serve
- You move to another state
- You acquire real estate in another state
- Your loved ones have different needs
- You have younger heirs
- Your relationships change
- You have already given assets away
- Your charitable interests change
- Tax laws change

Consult your advisors if you believe changes are in order. It is usually not wise to attempt to make changes yourself, as you may invalidate an entire will, trust, or other document.