



# Conversations

with the OFFICE OF GIFT PLANNING

SPRING 2023

dear friends

This is an important time for gift planning in the history of the College. We have several initiatives happening. First, our Legacy Initiative is underway with the goal of raising \$50 million in new bequest intentions before the end of the Defy Boundaries campaign. Second, the IRA Legacy charitable gift annuity is a new opportunity for individuals to fund a CGA directly from an IRA rollover. Third, with the lowering of the bequest intention age last year to age 60, we have expanded access to this important gift type to a whole decade of alumni, friends and parents. Planned gifts drive the future success of Connecticut College. Join the Rosemary Park Society and let's invest in each other, together. Thank you!

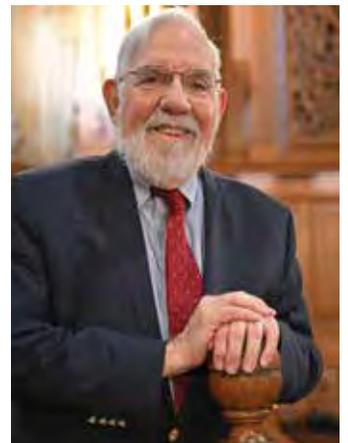


With gratitude,

Laura Becker  
Director of Gift Planning

## LEAVING A MUSICAL LEGACY

**PROFESSOR EMERITUS OF MUSIC JOHN ANTHONY**, a beloved member of the Connecticut College community, has taught music and served as the College's organist for over fifty years. John graduated from the University of Arkansas with majors in organ and French and received a Ph.D. from Yale University in Music History. He has played recitals throughout New England and in Europe and is a member and past dean of the New London County Chapter of the American Guild of Organists. John shares experiences from his time at the College and his commitment to restoring the excellent 1939 organ in Harkness Chapel.



John Anthony

### What have you most enjoyed about the College?

I arrived at Connecticut College in September of 1971. The College was looking to hire a visiting professor to teach organ, play for services in Harkness Chapel and teach one course in the Music Department. I felt that I was uniquely qualified for this position because of my training in organ performance, teaching organ performance and the pursuit of a Ph.D. in Music History. When my position became permanent, the combination of these three activities remained my duties for fifty years

Continued ►

➤ *Continued from front*

at Connecticut College and brought me great satisfaction throughout my career. Over the years, I taught courses in the entire western canon of music history, music theory, as well as organ and keyboard performance. I played the organ for regular services in Harkness Chapel in addition to playing organ concerts here and abroad and serving as keyboard accompanist for countless choral, faculty and student concerts. I have also served in various administrative activities including department chair, associate dean of the faculty and member of almost all College committees.

### **How have you experienced the College evolve and change over the years?**

I always answer this question by saying that students have changed tremendously, and yet, in certain ways, they remain the same. They are bright, curious, hard-working, thoughtful and open to change. They also have tremendous computer and electronic skills. They are still malleable, appreciative and respectful for what faculty have to offer. I arrived two years after coeducation was introduced to this former college for women. On the whole, I believe coeducation has been a great success.



### **Would you share some stories about the students you have taught, and, in particular, those you have kept in touch with over the years?**

Throughout my career, I have kept in touch with many, many students. This includes two of my earliest organ

students, one of whom went on to have a distinguished career herself as an organist and church musician. She is now beginning her own retirement. I also taught several return-to-college students who have had serious careers in music. In the early twenty-first century, I had the privilege of getting to know two of a small number of students from China, both of whom were interested in music. My close connection to each of them blossomed into a lifetime association with each of them and their families. I played for their weddings in the US. I made several trips to China to visit Conn alums and their families. I eventually spent two sabbatical leaves in China and Hong Kong studying music education practices and church music. I have kept in close contact with many alumni from China over decades. This has been a treasured experience for me.

### **How did you come to include Conn in your philanthropic efforts?**

Over fifty years, one of the most important buildings on campus for me has been Harkness Chapel. I have performed countless organ recitals and accompanied many student recitals and choral concerts in that building. I have played for Protestant and Catholic worship services for hundreds of weddings and many funerals on the Austin organ which was installed in 1939. For many years, I hoped that this instrument might be replaced with a new instrument, more in tune with my great interest in baroque music.

However, in recent years, I came to realize that the greatest gift that I could give would be money towards a restoration of the present instrument. I sought advice from organ technicians and restorers and have learned that Harkness Chapel houses an instrument of very high quality. It does show wear over eight decades but is well worth restoring. With guidance from the gift planning office, I have decided to strategically use my IRA through qualified charitable distributions to pay a multi-year pledge to an organ restoration fund. These distributions are being applied to my IRA required minimum distribution, and I am considering making gifts from another retirement plan in the future. I am pleased that my gifts are also supporting the current Defy Boundaries campaign. I have recently learned that restoring this wonderful organ is going to cost much more than I can offer. My gift is a beginning.

# TURN YOUR IRA INTO A CGA AND BUILD YOUR FUTURE!

**THE IRA LEGACY ANNUITY** allows individuals age 70 ½ and older to fund a charitable gift annuity directly from an IRA without taking the money into income. Consider this example:

Maureen, age 75, was at a point in her life where she wanted to give back to Connecticut College in a more significant way, and make a gift to the Defy Boundaries campaign, the largest campaign in Connecticut College history. Maureen decided she would fund a charitable gift annuity and rolled over \$25,000 from her IRA before the end of the current fiscal year, June 30, 2023. She received a 6.6% annuity rate and will enjoy annuity payments of \$1,650 for the rest of her life. Because law allows Maureen to rollover up to \$50,000 in one calendar year from her IRA and create multiple CGAs, in December she plans to establish a second CGA with the remaining \$25,000. With this second CGA, Maureen will be age 76 and her annuity rate will increase to 6.8%!

Charitable gift annuities are a smart way to give, building your future and the future of Connecticut College together. Contact the Office of Gift Planning at [giftplanning@conncoll.edu](mailto:giftplanning@conncoll.edu) for your own personalized illustration.

## IGNITING POSSIBILITIES THAT LAST: THE LEGACY INITIATIVE AT CONNECTICUT COLLEGE

**HELP US REACH OUR \$50 MILLION GOAL IN BEQUEST COMMITMENTS DURING THE DEFY BOUNDARIES CAMPAIGN!**

The Legacy Initiative is well underway! Here's an idea for the EASIEST planned gift you can make this year. Name Connecticut College as a percentage beneficiary of an account.

- Retirement Account
- Bank Account
- Life Insurance Policy
- Donor Advised Fund

All you have to do is log on to your account online and update the percentage designations. **Then tell us.**

Considering this gift option? We want to hear from you! Complete the response card or give us a call and let's start talking about how using testamentary plans and retirement funds to make a gift to Connecticut College is a smart and easy way to support the place you love.

## DETAILS ABOUT THE IRA LEGACY ANNUITY ALLOWANCE

- ▶ You can fund a CGA with dollars that are not taken into income!
- ▶ The maximum \$50,000 rollover to a charitable gift annuity is a one-calendar year opportunity.
- ▶ There is no charitable deduction for the gift, and it is for immediate payment, one or two-life CGAs only.
- ▶ The \$50,000 CGA limit is permitted on top of the annual \$100,000 IRA rollover allowance.

### CONNECTICUT COLLEGE ONE-LIFE CHARITABLE GIFT ANNUITY RATES

Age	Rate	Annuity Amount with a \$50,000 Gift
71	6.0%	\$3,000
73	6.3%	\$3,150
75	6.6%	\$3,350
80	7.6%	\$3,800
85	8.7%	\$4,350

# SUPPORTING UNRESTRICTED ENDOWMENT THROUGH BEQUESTS



In 1911, after the citizens of New London raised \$100,000 to fund an endowment for a women's college, securing the city to be the new home for Connecticut College for Women, Morton F. Plant announced his historic gift of \$1 million to be added to the endowment, an instrumental act that ensured the future success of Connecticut College. While the campus grew in enrollment and buildings after incorporation through the generosity of citizen friends, gifts through bequests continued to build the foundation of Connecticut College. One such bequest was a gift of thirteen hundred volumes of books and scientific equipment from William Palmer Bolles (1845 - 1916), a renowned physician whose boyhood home had been on the hilltop where the College now stands. And through his will, Morton F. Plant gifted another \$1 million to Connecticut College for Women, further strengthening our endowment.

You, too, can support the college in perpetuity by naming the Connecticut College endowment as a beneficiary of your will or living trust, or retirement account. **Think of it as creating an annual fund gift - distributing dollars to the College, forever!**

*let's talk*

**For more information contact:**

Laura Becker, Director of Gift Planning,  
at (860) 439-2416 or [giftplanning@conncoll.edu](mailto:giftplanning@conncoll.edu)

CONNECTICUT COLLEGE





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*For more information contact: Laura Becker, Director of Gift Planning, at (860) 439-2416 or [giftplanning@conncoll.edu](mailto:giftplanning@conncoll.edu)*

TEA *with*  
KATHERINE



**THURSDAY, MAY 4, 2023**

3:00 pm Eastern Time, Zoom

**Exclusively for members of the Rosemary Park Society**

Look for your invitation in the mail.



Rosemary  
Park  
Society 