

# A LIVING LEGACY OF FRIENDSHIP

## CHARITABLE REMAINDER TRUST

Marie Materi and Fred Brandauer grew-up a world apart, yet came together, according to Marie, for a purpose. "I just knew in my gut that God had brought us together for a reason, because we were of such very different backgrounds."

The son of Evangelical missionaries, Fred grew up in China and is a Professor Emeritus of Chinese Studies from the University of Washington. Marie served for 23 years in the Order of the Sisters of St. Joseph of Peace and earned three degrees at Seattle University. She was a nursing educator and counselor with Everett Community College.

The couple met through colleagues in 1981. Though she had no connection to China, Marie shares that, "I had a profound sense that we would be in a ministry to the Chinese together."

Marie and Fred married in 1982, and shortly thereafter purchased a small house in Seattle's University District. This was to be the start of a unique ministry.

"We bought that house in the early 1980s, a time when China was just opening up," says Fred. "They were sending top people to the U.S. as visiting scholars with little money. Those who came to the UW were living in very poor conditions. Marie and I wanted to help, so we hosted three scholars in our home."

A few years later, the couple started a nonprofit corporation, which they called China Friendship. The nonprofit purchased a home with room for seven more visiting scholars. Eventually, Marie and Fred purchased a third home, which raised their hosting capacity to 14. At the same time they acquired two additional homes, which they rented to students.

Over the years, China's economic status improved. Feeling that they'd accomplished their purpose of hosting the visiting scholars in more difficult economic times, Marie and Fred ended their ministry in 2004. They sold their home and the China Friendship house, and transitioned the non-profit corporation into the China Friendship Charitable Trust Foundation. The Foundation supported the School of Theology and Ministry's Scripture and Leadership Training (SALT) Program's Mandarin translation and cultural adaption.

In 2014, Marie and Fred transferred all of the Foundation's assets into a China Friendship Endowment within the School of Theology and Ministry. The purpose of the endowment is to further theological



ASSOCIATE DEAN TITO CRUZ, PICTURED WITH MARIE AND FRED, RECENTLY RETURNED FROM A TRIP TO CHINA BUILDING ON THE RELATIONSHIPS AND POSSIBILITIES OF THE CHINA FRIENDSHIP PROGRAM.

education with the goal of building and strengthening the Christian Church among Chinese worldwide.

By 2015, upkeep of their three remaining rental homes had become onerous and Fred and Marie felt ready to sell. That's when Sarah Finney, Director of Planned Giving in Seattle University Advancement, connected with them and explained the advantages of a Charitable Remainder Unitrust (CRUT).

**"WE PRAYED ABOUT IT FOR A LONG TIME AND GRADUALLY CAME TO REALIZE THAT PUTTING ALL THREE HOUSES INTO A CRUT WAS A GOOD WAY TO GO," SAYS FRED.**

"There were a few things behind this decision," Fred continues. "First, Marie and I feel that those houses were gifts to us and we wanted to put these resources into something meaningful. When the CRUT ends, the remainder will roll into the China Friendship Endowment, giving STM the chance to really do something significant."

"Second, the CRUT enables us to leave a legacy honoring the purpose for which China Friendship was established. Finally, Marie and I have many connections not only with Seattle U, but with STM. We've been happy with our decision."

The CRUT provides Marie and Fred with a lifetime income and eliminates the stress of owning rental properties. There are also tax advantages. The rental homes had significantly increased in value, and Fred and Marie would have had to pay a significant amount in taxes upon the sale.

"With the CRUT, we won't lose the capital gains, and we can put that money into a lasting legacy. It's not just avoiding taxes, it's having the full value of the assets to invest. It's a real Win/Win for us."

# A POWERFUL LEGACY

## FROM LT. HELENKAMP

Marion J. Helenkamp (September 1, 1931 - March 14, 2015), pictured here with her late daughter, Arianne Coleman, graduated from Seattle University in 1953, with a Bachelor of Arts degree in History. Marion grew up in Seattle and later moved to California. She became an officer in the Los Angeles Police Department at the age of 30. Marion retired twenty-six years later with the rank of Lieutenant - and the distinction of being the first African American woman Lieutenant in L.A.P.D. history. During her time at Seattle U, Marion was active in the SPURS, and was the first African American to serve in student government.

Several years ago, while attending her 50th Class Reunion on campus, Marion let Seattle University know that she had included her alma mater in her estate plans with a bequest from her living trust. To honor her memory and her generous legacy, two separate endowments have been established. The Marion J. Helenkamp



Endowed Scholarship in Criminal Justice will provide annual scholarships for students with financial need who are enrolled as full-time students in the Criminal Justice program. In addition, to honor Marion's life-long friendship with SU Hall of Fame basketball player, Lee Allen "Al" Giles '56, the Marion J. Helenkamp and Al Giles Endowed Fund has been created to provide program support for men's basketball. Seattle University is deeply honored to provide a lasting tribute to Marion's groundbreaking career in law enforcement for future generations of Seattle University students.

*Endowed funds at Seattle University are invested to grow over time. A portion of the earnings each year are used to award scholarships for students, or provide program support in perpetuity.*

# LEGACY IN ACTION.

We honor the memory of the following donors who have ensured lasting support for students and faculty at Seattle University:

- >>> Three donors have provided unrestricted gifts to the **SEATTLE UNIVERSITY GENERAL ENDOWMENT**: Thomas J. Bichsel '50, the Patrick and Virginia Mulvey Family Trust and Harold James Storm '52.
- >>> A gift by will from Bronislaus Ginter '53 is supporting the **SEATTLE UNIVERSITY ENDOWED SCHOLARSHIP FUND**.
- >>> A generous gift from Mary A. Guernsey will create **THE RAYMOND C. GUERNSEY ENDOWED SCHOLARSHIP** to support students with financial need at the Albers School of Business and Economics.
- >>> A bequest from attorney James F. Henriot '49 will establish **THE JAMES F. HENRIOT ENDOWED SCHOLARSHIP** for students at the School of Law.
- >>> Two gifts provided by the Estate of Mary Ann (Cox) Hermesen '60, '82 are supporting **SCHOLARSHIPS AT THE COLLEGE OF NURSING AND THE COLLEGE OF EDUCATION**.
- >>> Gifts from the Leo N. Puckett and Elizabeth G. Puckett '60 Family Trust were used to provide scholarship matching funds, as well as to create **THE LEO N. AND ELIZABETH G. PUCKETT FUND FOR FACULTY AND STUDENT RESEARCH** at the College of Education.
- >>> The Estate of Maryam Steffen included a gift to support the work of the **RONALD A. PETERSON LAW CLINIC** at the School of Law.
- >>> A gift from Linda H. Tellesbo '85 has established the **LINDA H. TELLESBO ENDOWED SCHOLARSHIP** for MBA Students at the Albers School of Business and Economics.
- >>> Mary McLellan Williams provided a thoughtful bequest to support **THE LEMIEUX LIBRARY & MCGOLDRICK LEARNING COMMONS**.

Thank you for your interest in planned giving at SU. We are here to provide information and support to you and your advisers in determining just the right gift for you. It would be our pleasure to talk with you and learn more about your connection with Seattle University. Please give us a call.



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**SEATTLE UNIVERSITY**

SEATTLE UNIVERSITY

# LEGACY

CREATE YOUR LEGACY: Build their future

"IT'S ALL SO EXCITING."

I WANT TO HELP ENSURE THE CONTINUED EVOLUTION OF JESUIT EDUCATION AT SEATTLE UNIVERSITY."

-JEANNE MARIE LEE, '51



MARIE MATERI, '62, '79, '91 AND FRED BRANDAUER FIND A HOME FOR THEIR LIFE'S WORK AT THE SCHOOL OF THEOLOGY & MINISTRY.

## CAMPUS EVENTS



**HOMECOMING WEEKEND**

**February 3-5**  
This annual event brings alumni, students, parents and community members together to celebrate the pride and passion for our university.



**ANNUAL SCHOLARSHIP LUNCHEON**

**Thursday, April 20**  
Honoring Legacy Society members, scholarship donors and grateful scholars.



**GRAND REUNION WEEKEND**

**May 5-7**  
Reunite with friends at your 40th, 50th and 50-year-plus reunion celebrations.

FOR MORE INFORMATION, CONTACT THE OFFICE OF PLANNED GIVING: (206) 296-6974

# REVERED RELATIONSHIPS INSPIRE GIVING

The Lee's relationship with Seattle University has been generations in the making, and will continue to impact the students at Seattle University for generations to come.

Jeanne Marie Lee's ties to the Jesuits began early in life. Her father, who had attended Seattle College for high school in the early 1900's and then Gonzaga, was a great admirer of the Jesuit priests at St. Joseph's, the family's home church on Capitol Hill. Jeanne Marie has memories of growing up with Father Raymond Nichols, S.J., and Father James McGoldrick, S.J. She attended Holy Names Academy and then Seattle University.

A literature major at SU, it was a religion class that had the biggest impact on Jeanne Marie's life. There she met her future husband, Rhoady Lee, a business major and member of the SU ski team. She and Rhoady married in 1951.

While attending SU, the Lees began a 30-year friendship with University President Albert Lemieux, S.J. He recruited Rhoady to join the Alumni Board of Governors, initiating the Lee's long history of service to Seattle University. Later, the Lees developed a friendship with Father Lemieux's successor, William Sullivan, S.J.

Education has been at the center of the Lee's charitable giving. Their direct contributions have supported student scholarships and many building projects including the new home for the School of Theology and Ministry and the Student Center. They were also the lead benefactors in making the Chapel of St. Ignatius possible.

"Our giving has evolved over the years," says Jeanne Marie. "We are comfortable now, but it wasn't always that way. The first gift we ever gave was a stretch because we didn't have much then, but it felt good to be part of something important."

In addition to direct giving, the Lees have included Seattle University in their estate planning through a charitable remainder trust, which they funded with appreciated property. The trust terms provide Jeanne Marie with income during her lifetime.

"The goal is that Mom won't have to take the income stream," says daughter Maureen Lee, who helped set-up the trust, "but it's there if needed -- a safety net. Otherwise, the money is kept in the trust and reinvested. A share of the trust will pass to the SU Sullivan Leadership Scholarship Endowment and the Institute for Catholic Thought and Culture Endowment when the trust proceeds are distributed."

"The Sullivan Scholars are a remarkable group of young people," says Jeanne Marie.

**"I NEVER CEASE ADMIRING THE UNIVERSITY THAT GIVES SUCH OPPORTUNITIES TO THOSE WHO ACCEPT THE HONOR AND FULFILL THE EXPECTATION OF THEIR SCHOLARSHIPS."**

Growing up, Maureen remembers her parents' connection to SU through their enduring personal friendships with the Jesuit priests.

In 2005 Maureen, her five siblings and their spouses decided to make a substantial gift in their parents' name to something that Jeanne Marie and Rhoady held dear. They chose Seattle University, and their gift established the Lee Center for the Performing Arts.

The performing arts are a passion for Jeanne Marie. She was a soloist in the a cappella choir, sang in the "Double Quartet," and had lead roles in the SU Opera Guild's 1948 production of *H.M.S. Pinafore* and its 1951 production of *New Moon*.

The above photo of Jeanne Marie, surrounded by three of her children and their spouses, was taken at the 10th Anniversary celebration of the Lee Center for the Arts on November 16, 2016.

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## AS SEATTLE UNIVERSITY CELEBRATES ITS 125<sup>TH</sup> ANNIVERSARY

our community is reflecting upon and honoring the dedication, spirit, sacrifices, and vision of the people who have written the first 125 years of our university's history. These individuals have laid a solid foundation upon which we will build Seattle University's future.

Members of the growing Legacy Society will help us build upon the foundation we have inherited. In the years ahead, we are poised to become an ever more essential thread in the fabric of this dynamic region. Legacy Society gifts will lift academic excellence to new heights across campus and ensure that Seattle U will thrive as a university of distinction driven by its mission, and renowned for its vision and ability to provide a world-class education that empowers students to become change makers for our community and the greater good. I am thankful to each of you who has shared with us your future gift intentions. We are honored to recognize you below.

I wish you many blessings and joy in this New Year and I hope to celebrate our history and our future with you on campus at one of our upcoming 125th anniversary events.

With gratitude,

Stephen V. Sundborg, S.J.  
President

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\*Denotes deceased Legacy Society members from January 2012 through October 2016.

## CHARITABLE REMAINDER TRUST

— HOW IT WORKS —

Charitable remainder trusts are the most powerful and flexible charitable planning vehicles available to donors because of the potential tax advantages and the flexibility. The staff in the Office of Planned Giving can help you get started and guide you through this process.



Donor chooses the asset(s) to use. Assets are gifted to the trust, then sold, avoiding capital gains tax. Donor also receives an income tax deduction.



Funds in the trust are invested to grow over time. Trust makes monthly or quarterly payments to the donor or other named individual(s).



When trust term ends (1 or 2 lives, or certain number of years) the amount remaining goes to SU, and can include other charities as well.

**WE APPRECIATE OUR DONORS' GENEROUS COMMITMENT TO SEATTLE UNIVERSITY, AND WE WANT TO RECOGNIZE EVERYONE ACCORDING TO THEIR WISHES.**

If we have inadvertently made an error, please contact Beth Klein in the office of Planned Giving at 206-296-6974 with questions or corrections.