

CORNERSTONES

A Quarterly Publication of The University of Toledo Foundation



INSIDE THIS ISSUE:

Memorial Golf Event
Supports Metastatic
Breast Cancer Group

UT Foundation Names
New COO And
Fundraising Officers

UT Foundation
Outperforms
Investment Averages

Meet Our Board

Honor Roll

visit us at
utfoundation.org

SPENGLERS CREATE GIFT ANNUITY TO SUPPORT WOMEN'S BASKETBALL

The University of Toledo women's basketball program has a rich tradition. The Rockets have won nine Mid-American Conference regular-season titles and advanced to the NCAA Tournament on seven occasions. UT is also the only MAC basketball program to capture a national postseason tournament, winning the 2011 postseason WNIT.

The Midnight Blue and Gold's successful history and bright future played a major role in Christine and Bill

Spengler's decision to donate \$100,000—one of the largest planned gifts in the program's history—to UT women's basketball.

"We're extremely grateful for the generosity of the Spengler family," head coach Tricia Cullop said. "Having spent time on the board with Chris for Women & Philanthropy, I witnessed just how generous she is with her time. Chris is always finding ways to help others. She's an incredible role model for my players,

and I can't thank Chris and Bill enough for thinking of UT women's basketball. Their planned gift will help our program continue to grow for many years to come."

The Spenglers provided their gift to the UT Foundation through a charitable gift annuity. This arrangement will provide them with an annual income from the fund and a charitable tax deduction, as well as the satisfaction of knowing the women's basketball program will greatly benefit from their generosity after their lifetimes.

"The University of Toledo has been a part of our lives for many years: mine in particular," said Mrs. Spengler, who started working at UT in 1977 and currently



Bill and Chris Spengler's \$100,000 charitable gift annuity will provide them with annual income and a charitable tax deduction, and will also benefit the UT women's basketball program.

continued on page 2

continued from page 1

SPENGLERS SUPPORT WOMEN'S BASKETBALL

serves as UT's director of advancement relations.

The Spenglers have long been affiliated with Rocket Athletics, having club seats for both men's and women's basketball, as well as stadium club seats for football. Yet Mrs. Spengler, who was a "roving forward" for her high school team, has a special affinity for women's basketball.

"Bill and I have been so impressed with the direction of the program and the dedication from Coach Cullop," she said. "It's a joy to watch the Rockets play, and we wanted to be a part of the process of continuing to build and enhance that program well into the future. We believe in giving back, and we're happy we found ourselves in a position to make a gift."

A charitable gift annuity appealed to the couple for many reasons, she said. "Our gift will give us a lifetime income and, through the good investment work of the UT Foundation, the corpus of the gift should continue to grow," she explained. "If we both live to ripe old ages, this gift could be worth considerably more than it is worth right now, and that was an attractive factor for us."

"We sincerely appreciate the support we have received from Chris and Bill over the years at UT," said Dave Nottke, senior associate athletic director for development and external affairs. "Their generosity and support will benefit our women's basketball program for years to come."

"Charitable gift annuities are wonderful giving vehicle options for donors," noted Paul Hood, UT director of planned giving. "They often enable individuals to increase their incomes, get a healthy income tax deduction, and support the mission of UT."

To make a donation to UT Athletics, call the Athletic Development Office at 419-530-2510. For information about charitable gift annuities and other planned giving options, contact Paul Hood, director of planned giving, at 419-530-5303 or paul.hood@utoledo.edu or visit utoledo.plannedgiving.org.

UT FOUNDATION NAMES NEW COO AND FUNDRAISING OFFICERS

The University of Toledo Foundation has named a chief operating officer and two new fundraising professionals.

Derek Groves serves as chief operating officer for the UT Foundation. Prior to joining the UT Foundation, he served as senior vice president of community relations and chief development officer for Four Seasons Compassion for Life Foundation in Asheville, N.C. He earned a bachelor of business in entrepreneurship from Western Carolina University and a master of science in organizational management from Peru State College. He is a Certified Fund Raising Executive (CFRE).

Nick Kulik is major gifts officer for the College of Natural Sciences and Mathematics; College of Languages, Literature, and Social Sciences; and the College of Communication and the Arts. His fundraising experience includes positions at ProMedica, Bowling Green State University, and United Way. He graduated from BGSU with a bachelor's degree in journalism and has a CFRE certification.

Nicole Candle is major gifts officer for the College of Health and Human Services and the Jesup Scott Honors College. Most recently, she was manager for the Women's Initiative at United Way of Greater

Toledo. She earned a bachelor of arts in communications, with an emphasis on public relations, as well as a master's degree in counseling and guidance in college student personnel, from California Lutheran University.



Derek Groves



Nick Kulik



Nicole Candle

visit us at utfoundation.org

UT FOUNDATION OUTPERFORMS INVESTMENT AVERAGES

The University of Toledo Foundation achieved a 2.3 percent total investment return for the 2015 fiscal year, surpassing the 2.0 percent average for participants of similar asset size, in the NACUBO-Commonfund Study of Endowments.

The UT Foundation also outperformed national averages for the three-, five-, and ten-year returns for its asset class in the industry survey by the National Association of College and University Business Officers and the Commonfund. The Foundation's five-year-average return was 11.3 percent, compared to a 9.5 percent average for peer institutions.

Investments are overseen by the UT Foundation Board of Trustees

and its investment committee. Broad diversification and a focus on long-term growth are major components of the Foundation's investment success, noted Russ Mitchell, investment committee chair.

"While we are always mindful of our short-term performance, UT Foundation funds are held in perpetuity. Therefore, we remain focused on long-term results rather than year-to-year returns or attempting to time the market," he said. "Our investments continue to perform well against our benchmarks."

The University of Toledo and the UT Foundation's combined endowment totaled \$419.2 million as of June 30, 2015.

MEMORIAL GOLF EVENT SUPPORTS METASTATIC BREAST CANCER GROUP

Jackie Ayers was a nurse, alumna, and retired faculty member of the former Medical College of Ohio. A business owner and community volunteer, she served as a board member for Hospice of Northwest Ohio and the Zepf Center, a disaster volunteer for the American Red Cross, and a docent at the Toledo Museum of Art.

Jackie was also a 21-year cancer survivor who eventually lost her battle with metastatic breast cancer in 2012.

While undergoing treatment, Jackie learned about the Metastatic Breast Cancer (MBC) Support Group at the Eleanor N. Dana Cancer Center. This group helps individuals cope with the progression of their cancer and learn about new treatment options.

The Wacky Jackie Golf Tournament, established in her memory, benefits the MBC Support Group as well as the Integrative Therapies Program at the Eleanor N. Dana Cancer Center on the UT Health Science Campus.

This year's event is Friday, Aug. 19, with a shotgun start at 1 p.m. at the Valleywood Golf Club in Swanton. Online registration will be available in early May at wackyjackiegolf.com.

Sponsorship and in-kind gift opportunities are also available for the event, which is organized by the UT Women's Golf League.

For more information, contact Kathy McVicker at kmcvicker@bex.net or Sherry Andrews at sherry.andrews@utoledo.edu.



The Wacky Jackie golf event, in memory of Jackie Ayers, benefits a support group for metastatic breast cancer.

HONORROLL

The following donors have become eligible for special recognition:

Presidents Club

AVI-SPL Inc.

Rick A. and Jennifer Cherry

Dr. Greg Christiansen and Dr. Laura Brookfield

Dr. E. Christopher Ellison and Dr. Mary Pat Borgess

Dr. Prasad Kakarala

Alan W. Kimpel and Barbara S. Steele

John L. Leschik Jr.

Eric Longmire and Dr. Berrin Ergun-Longmire

Dr. Nancy D. Morrison

Scott Preston and Dr. Sheryl J. Herner

Shimadzu Corporation

Kevin A. and Brenda Spear

Alvin L. and Marie S. Spicer

Stephen H. and Penny K. Staelin

Karl Storz Endoscopy-America Inc.

Dr. Allison A. Vanderbilt

Robb and Laurie Williams

Roger C. and Beth Zeiter

Heritage Oak Society

Dr. Charles M. and Carol A. Balch

as of April 11, 2016

CORNERSTONES

The University of Toledo Foundation
Driscoll Center, MS#319
2801 W. Bancroft St.
Toledo, Ohio 43606-3395



For address changes, please send the new address, along with this mailing panel, to the above address.

Non-Profit
Organization
U.S. POSTAGE
PAID
Toledo, Ohio
Permit No. 242

MEET OUR BOARD



Gerald Seizert, CFA, is managing partner of Seizert Capital Partners, directing the firm's equity disciplines. He also serves on boards of Beaumont Hospital and the Manresa Jesuit Retreat House. He received a bachelor's degree in finance in 1975 and an MBA in finance in 1977, both from The University of Toledo.

To make a gift, contact a member of the fundraising staff:

VP, Advancement
Samuel I. McCrimmon, JD:
419-530-4249

Associate VP,
Health Science Campus
Howard Newman, JD:
419-383-6840

Interim Associate VP,
Main Campus
Brett Loney, JD, ACFRE:
419-530-2408

Executive Director, National
Development
Barbara Tartaglia-Poure,
ACFRE: 419-530-2713

Corporations and
Foundations
Brett Loney, JD, ACFRE:
419-530-2408

Planned Giving
L. Paul Hood, Jr., JD, LLM:
419-530-5303

Adult and Lifelong
Learning
Brett Loney, JD, ACFRE:
419-530-2408

Athletics
Dave Nottke: 419-530-2510
Matt McKinney: 419-530-5347

Business and Innovation
Dan Stong, CFRE:
419-530-5525

Communication and Arts
Nick Kulik, CFRE:
419-530-5428

Education
Brett Loney, JD, ACFRE:
419-530-2408

Engineering
Kristyn Theisen: 419-530-6175

Health and Human Services
Nicole Candle: 419-530-4134

Health Science Campus
Jennifer Schaefer: 419-383-5071

Honors
Nicole Candle: 419-530-4134

Languages, Literature
and Social Sciences
Nick Kulik, CFRE:
419-530-5428

Law
Brett Loney, JD, ACFRE:
419-530-2408

Medicine and Life Sciences
Howard Newman, JD:
419-383-6840

Natural Sciences and
Mathematics
Nick Kulik, CFRE:
419-530-5428

Nursing
Howard Newman, JD:
419-383-6840

Pharmacy and
Pharmaceutical Sciences
Jeff Barton: 419-530-5413

UT Libraries
Brett Loney, JD, ACFRE:
419-530-2408