



UNIVERSITY of  
**LOUISIANA**  
LA FAYETTE

# LOUISIANA HERITAGE

A GIFT PLANNING NEWSLETTER

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# A LEGACY THAT STANDS THE TEST OF TIME

This summer marks the 50th anniversary of the Apollo moon landing. The legacy of Neil Armstrong and the Apollo crew will stand as a reminder of a once inconceivable accomplishment for generations to come.

If you are looking for a way to leave your own legacy, you can do so by leaving a charitable bequest to support the work of UL Lafayette's faculty and students. A bequest is a gift of your personal property upon your passing to a person or entity by means of a will or trust, and many people choose to create an "endowed" gift with their bequest. The purpose of an endowment is to provide a source of perpetual funding. The gift is permanently invested, and distributions from the endowment earnings are made available annually to spend on activities consistent with the intent of the gift.

Another way to leave a legacy is through an IRA charitable rollover gift. If you are 70 1/2 or older, you can make a gift to our organization directly from your IRA. This will count against your required minimum distribution and help you avoid income taxes on the distribution.

With just a little planning, you can leave a legacy of love and support so that your good works continue well into the future. Fortunately, we have the right tools and an experienced staff to help make planning simple and easy for you.

# STEPS TO LEAVING A LEGACY OF YOUR OWN



Working with UL Lafayette's Office of Development can help you identify individual goals of your estate plan. We can help you create a plan that will meet your financial needs as well as support areas of the University that you are passionate about.



Your ideas for support and enthusiasm for certain areas of the University can lead to new innovations and make a big difference in the lives of our faculty and students. By including a gift to UL Lafayette in your estate plan, you can make a true impact that will be felt for years to come.



Estate planning can seem daunting, but we can help. To make planning easier, try breaking the process into smaller steps. A good start is contacting our office and requesting a free copy of our estate planning guide.

## Remembering

**DAVID PAUL COMEAUX**  
April 13, 1964 - February 16, 2019

*David Paul Comeaux, known to his friends and loved ones as "Dave," was a native of New Iberia, Louisiana and a resident of Lafayette, Louisiana for most of his life. Dave was a graduate of the University of Louisiana at Lafayette in the B.I. Moody III College of Business and a graduate of Vanderbilt University in Higher Education Administration. He was a member of the Lambda Chi Alpha Fraternity.*

*Dave joined the UL Lafayette (then University of Southwestern Louisiana) staff in 1987. Eventually, Dave became the Interim Executive Director of Development and then the Senior Director of Planned Giving. For more than 25 years, Dave worked to increase philanthropical giving to the University and was an integral part of UL Lafayette's family of alumni and donors. His dedication to the University led countless donors to connect their passions and generosity with the needs of UL Lafayette.*

*Dave and his wife Cindy were ardent supporters of the University. In 1999, the couple created the David & Cindy Comeaux Scholarship out of Dave's desire to help students in the Moody College of Business' Department of Management. He recognized that the education he and Cindy received improved their lives, and it was his hope that this scholarship makes a difference in the lives of UL Lafayette students.*

*To know Dave was to know someone who lived life courageously and joyously. He will be greatly missed by the entire UL Lafayette family.*



# PLANNED GIVING SPOTLIGHT: MARSHA KRAMER

Although she lives in New York, one alumna is choosing to remember the University of Louisiana at Lafayette with her planned gift.

Marsha Kramer graduated from the University Louisiana at Lafayette (then the University of Southwestern Louisiana) in 1977 with a master's degree in computer science. Kramer explained she started her planned giving to the University because she feels she was fortunate enough to have inexpensive tuition, and she was wondering what impact she could make with her charitable giving.

"Although it's been a long time since I attended the University, I wanted to do something meaningful with my money," she said. "I wanted to give back to the students."

According to Kramer, she is hoping that current UL Lafayette students can look back on their days as a student and give back to the University like she did.

"When they're busy working in a few years, I want them to see how my gift benefitted them," she said. "I want them to realize that it's something they got from alumni, and they have the chance to give back like I did."

Kramer chose to use her Required Minimum Distribution (RMD) from her Individual Retirement Account (IRA) to create the Marsha J. Kramer Endowed Superior Graduate Student Scholarship in Computer

Science and the Marsha J. Kramer Endowed Scholarship in Computer Science. Donors that are over 70½ years of age have to take a part of distribution from their IRA every year.

"I thought this was a great idea when I heard about it, and I'm about halfway there," Kramer said of her endowments.

As the newest Louisiana Board of Regents matching opportunity, Endowed Superior Graduate student scholarships are established to assist academic departments and units to recruit, retain and graduate

excellent graduate and first professional degree candidates as well as engage post-doctoral fellows. Through this competitive program, the Board of Regents provides a \$40,000 match for each \$60,000 private gift, creating a \$100,000 endowment to support graduate students. As UL Lafayette increases support for graduate students, this enables

the University to make larger strides in research and development.

Kramer is passionate about supporting graduate studies and credits her graduate degree for a fulfilling career. After graduating from USL, she got a job at Loyola University teaching math and computer programming. According to Kramer, she would not have gotten her teaching job without the degree she got at USL.



## The Estate of Dr. J. Lee Leonard III

Dr. Leonard's planned gift to the College of Nursing & Allied Professions was used to sponsor the attendance of 18 student members of the UL Lafayette Student Nurses Association to the 2018 state convention of the Louisiana Student Nurses Association. The college is also using Dr. Leonard's gift to launch new outreach efforts to reconnect with alumni working in local hospitals. In addition to support for the College of Nursing and Allied Health Professions, Dr. Leonard's gift also contributed to the RCAF Capital Campaign and the student athlete performance center training room as well as the RCAF Annual Fund.



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## Louisiana Heritage Society™

The Louisiana Heritage Society™ is a special group of loyal supporters that have stepped forward to help plan for the University's future. Each year, the UL Lafayette Foundation honors those who included the University in their estate plans or through deferred gifts. By working with these donors during the estate planning process, we can ensure that these gifts will be used in the manner they desire and provide the maximum benefit to our students, faculty, and programs. Most importantly, Heritage Society members know they have left an enduring legacy and helped shape UL Lafayette for generations to come.



# 2018

**LOUISIANA HERITAGE  
SOCIETY INDUCTEES**

**Dr. Jimmie Y. Buie \***

**Glenny Lee Castagnos Buquet**

**Dr. Joseph G. Burleigh**

**Lisa M. Chmiola**

**Dorothy E. Coats \***

**Ellen Coussan Coffin \***

**Sonny & Sandra Launey**

**Dr. J. Lee Leonard, III \***

**Charles & Rhonda Moncla**

**Col. Robert W. & Dr. Tess VanHoy  
Thomas & Kimberly Bainbridge**

*\* denotes posthumous induction*