

THE Bishop William White REPORT



The Episcopal Academy

Office of Planned Giving
1785 Bishop White Drive | Newtown Square, PA 19073
484-424-1780 Tel | 484-424-1790 Fax
www.episcopalacademy.org

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Sam Brown '35



James Parry '66

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Independent Schools Receive Huge Gifts

Planned gifts to three independent schools have attracted national attention. In September 2007 George School in Newtown, PA became the beneficiary of a **Charitable Lead Trust** established by alumna Barbara Dodd Anderson, Class of 1950. The school will receive payments that will total \$128.5 million over a period of twenty years. The funds will be used to support current strategic goals of the school including student financial aid and faculty and staff compensation.

In 2009 Mr. and Mrs. Henry C. Woods, Jr. bequeathed \$60 million to the Lawrenceville School in Lawrenceville, N.J. Mr. Woods, a member of the Class of 1940, served the school as an English teacher and trustee. Their **bequest** will be used to fortify key programs ranging from faculty support to student financial aid and campus facilities.

Chatham Hall, the girls' school in Chatham, Virginia recently announced a **bequest** of \$31 million from Elizabeth Beckwith Nilsen, Class of 1931. Her gift will increase the school's general endowment to \$51 million.

These remarkable examples illustrate the enormous benefit planned gifts can have on an institution.

How does Episcopal's endowment compare?

See page 5 for the answer.

Non-Profit
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PAID
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Permit #170

Become An Episcopal Insider

I'm thinking about...

"...including the school in my will. I'd like to help put an Episcopal education within reach of students from all backgrounds. Would this be possible?"

"...the various ways I can support my 50th Reunion fund. Can you explain the planned giving options to me?"

"...giving the school a painting."

How do I go about this?

Questions like this are always welcome at Episcopal. They lead to wonderful conversations, fresh and exciting ways to benefit our students, and an understanding of what you'd like to accomplish through your support.

As we learn about your objectives, you will gain a better understanding of Episcopal's program and goals and the giving options available to you. If you wish, you can visit a classroom, see our students in action, or talk with our faculty or Head of School.

Working with one or more EA development professionals, you will be able to craft a plan that serves both you and the school. Working together reinforces the ties we share to one of the finest independent schools in the country.

Become an insider and learn how rewarding philanthropy can be! I welcome your call at 484-424-1780 or your e-mail at jaeger@episcopalacademy.org.

Best regards,
Carolyn Jaeger, *Director of Planned Giving*

THE BISHOP WILLIAM WHITE SOCIETY OF THE EPISCOPAL ACADEMY

I have included The Episcopal Academy in my estate plan through:

My will A trust My retirement plan Life insurance

I would like to include Episcopal in my estate plans. Please contact me to discuss.

I would like to receive information regarding the following planning tools:

Charitable gift annuities Pooled income fund Charitable trusts
 Bequests Life insurance Gifts of retirement plan assets

Name (please print) _____ Class _____

Address _____

City _____ State _____ Zip _____

() ()
Business telephone _____ Home telephone _____ E-mail _____

Please complete this reply card and mail to: Office of Planned Giving, The Episcopal Academy, 1785 Bishop White Dr., Newtown Square, PA 19073 Telephone 484-424-1780

Bishop William White Society Hears Latest On EA Athletics



1

Each year Ham Clark hosts a luncheon honoring members of Episcopal's Bishop William White Society. The fall 2009 event was held in the Sherrerd Board Room on October 27, just a week before the 100th EA/Haverford football contest. A spirited group of supporters, including several of EA's finest former athletes, turned out to hear Athletic Director Gina



2

Buggy discuss the big game and Episcopal's determination to recruit the strongest possible teams. "At Episcopal these athletes must also be able to succeed in the classroom," noted Ham Clark. Today Episcopal's girls and boys compete in thirty varsity sports and the school continues to field many of the most competitive teams in the Inter-Ac League.



3

The Bishop William White Society welcomes all who name The Episcopal Academy as beneficiary of a will, trust, life income gift, or other type of planned giving arrangement.



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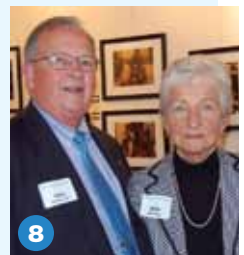


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1. EA football great George Stanley '39 with Director of Athletics Gina Buggy
2. Dick '48 and Peggy Schneider, Head of School Ham Clark
3. Dick Lander '44, Ken Tunnell '47, RT Toland '40, Hughes Cauffman '34
4. Howard Morgan '57, Charles Chadwick '50, Rush Haines '61
5. Hap Aller '46
6. Joe Gordon '43, alumni parent Charles MacIntosh, and Jeff Morrison '74.
7. Won Shin '85 and George Boyd '54
8. John '50 and Ellie Rettew



7



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During these challenging economic times, when all schools are guarding their bottom line and cautiously planning for the future, I am especially mindful of the power of bequests and other estate gifts to provide the financial resources we need to do our best work.



I frequently remind our students to make the most of everything their Episcopal education offers—the opportunity to gain a solid academic foundation, to learn to read and write and speak effectively, to learn how to work as a team, to be exposed to ideas and the best of our culture, to explore and develop creativity, to learn to think critically, to learn about balance and the importance of service, to attend chapel regularly and enrich their spiritual life, to live and learn and work with others from different backgrounds, to be exposed to many other high achievers, to work with challenging and committed teachers who are also great role models, to learn time management and to become well prepared for college, for work, and for life.



Improving our financial foundation will further Episcopal's ability to provide the opportunities that put our students on the path to college and a meaningful, productive life. If you believe in what an Episcopal education can accomplish, please consider remembering the school in your estate plans.



Head of School Ham Clark, March 2010

Two Alumni Benefit School Through Their Estate Plans



James C. Parry '66

James C. Parry, Class of 1966, and his wife Donna live in Arlington, Virginia. Jim served in the Air Force for 22 years, flying AWACS surveillance aircraft on over 30 missions during the Vietnam War. Now retired from the military, he teaches science, engineering and aeronautics in the Arlington Public Schools.

In Jim's words, "Episcopal had a great impact on my

life, thanks to personal attention from teachers and the school's emphasis on values. The faculty worked very hard to mold me into the person I am today. One math teacher in particular, Robert Gibby, prepared me to study engineering in college, and that led to my work on the C-17 aircraft design. I knew Mr. Gibby was kind of teacher I wanted to emulate someday."

An advocate of educating students for careers in math, science, and engineering, Jim has been involved in Project Lead the Way in Virginia, which brings engineering concepts to high school students. He roundly endorses Episcopal's robotics program and EA's participation in the annual statewide Junior Engineering Technical Society competition at Widener University. A plaque inscribed with the quote below commemorates his support of the science workroom in the Hill Science Center.

Recently Jim announced his plans to leave an unrestricted bequest to The Episcopal Academy. "Giving back to EA will help others gain the same kind of experience I had. If I can help students reach their potential, I will have been successful."

"I teach — I touch the future."

—JIM PARRY, CLASS OF 1966



Episcopal's endowment in 2010 stands at **\$24 million.**

Help it grow today.

Sam Brown '35

He sailed. He fished. He played the tuba in a band and was rarely without his harmonica. Samuel Houston Brown, Episcopal Academy Class of 1935, was known for his *joie de vivre*, his belief in the goodness of humanity, and his gift for making friends. When his beloved wife Nathalie died in 2007, he gathered family and friends to celebrate her life and comfort each other with song.

Such was the warm and exuberant spirit of Samuel H. Brown. Sam was the son of Edith and Henry Brown of Chestnut Hill and the brother of Henry, EA '31 and Tom, EA '44. After nine years at The Episcopal Academy, he graduated from the University of Pennsylvania and served in the U.S. Army Air Corps as captain of the 365th Fighter Group in Europe. Upon his return he joined the Weyerhaeuser Company and moved with Nathalie to Washington State,

eventually ending up in Tacoma. While raising six children, the two became known as pillars of the community for their commitment to religious, artistic, social service, and educational organizations.

In 1957 Sam and Nathalie founded the Charles Wright Academy in Tacoma. Sam purposely modeled the academy after the curriculum and values he experienced at Episcopal. "I liked the whole program at Episcopal—including the classics and chapel," he commented a few years ago. "I give thanks for the influence Episcopal has had on me."

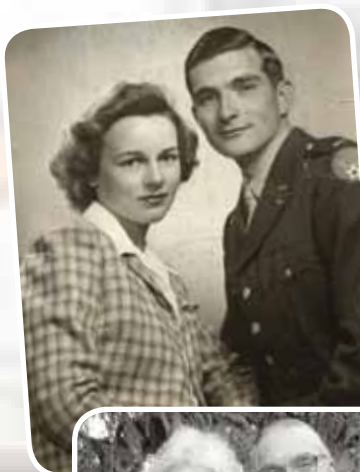
For more than 50 years the Charles Wright Academy was Sam's passion. During that time he helped guide the academy into the thriving Pre-K through grade 12 institution it is today. It is said that he played a role in the life of every student that passed through its doors.

Samuel Houston Brown died peacefully at his home on January 19, 2009. He has honored The Episcopal Academy with a generous bequest, and a pew in the Class of 1944 Chapel

will long pay tribute to his memory.

"I give thanks for the influence Episcopal has had on me."

—SAM BROWN, CLASS OF 1935



A Winning Idea

Would you like to make a gift to The Episcopal Academy and receive quarterly income from the school every year for as long as you live? This secure “gift that gives back” is called a Charitable Gift Annuity (CGA).

The Charitable Gift Annuity is especially attractive in the current economic environment. After fees, taxes, and inflation, today’s extremely low interest rates on savings accounts and certificates of deposit can actually cost you money. If risk free, guaranteed income is what you are looking for, a Charitable Gift Annuity might be an appealing alternative. It works like this: in return for a gift of stock or cash, the school pays you a guaranteed amount every year for the rest of your life, or over the lifetimes of you and your spouse. The annuity rates vary with age—the older you are, the higher the rate. You also receive a tax deduction in the year you make the gift, and only a portion of the income you receive is subject to income taxes.

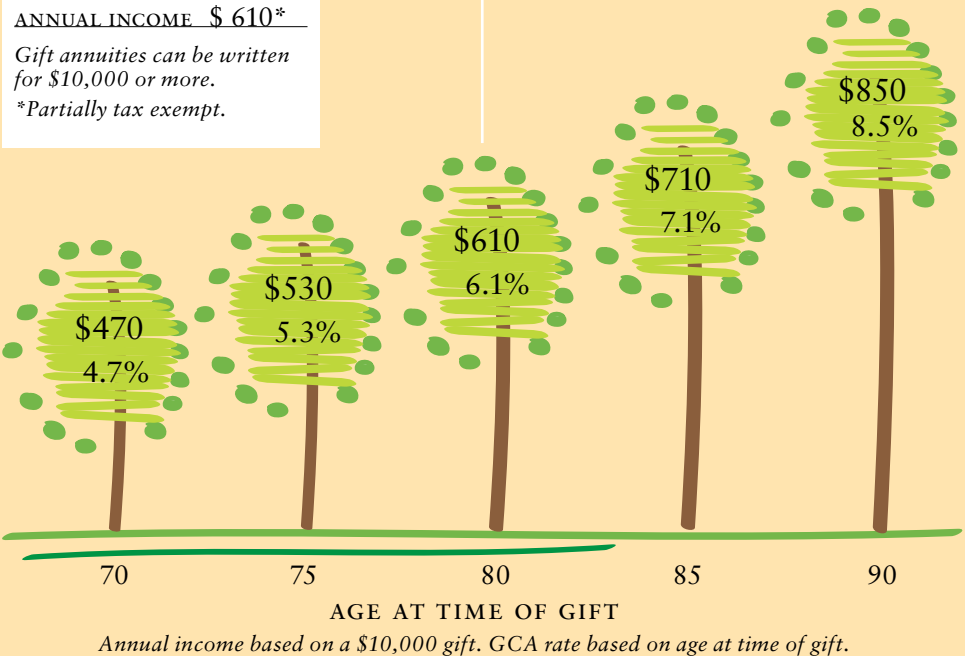
Your gift provides for Episcopal’s future as well as your own. It can increase your present income and help ensure Episcopal’s tradition of excellence. Membership in the Bishop William White Society accompanies all planned gifts, including gift annuities.

For information on how you can create a Charitable Gift Annuity at The Episcopal Academy, please contact Carolyn Jaeger, Director of Planned Giving, at jaeger@ea1785.org or call 484-424-1780.

EXAMPLE:

John Doe, age 80	
GIFT	\$10,000
CGA RATE	6.1%
CHARITABLE DEDUCTION	\$ 5,769
ANNUAL INCOME	\$ 610*

Gift annuities can be written for \$10,000 or more.
**Partially tax exempt.*





Founder's Day 2010

Please join us for Founder's Day 2010
celebrating the founding of The Episcopal Academy
at Christ Church in 1785.

THURSDAY, APRIL 29, 2010 at 7:00 P.M.
CLASS of 1944 CHAPEL
NEWTOWN SQUARE

Dr. William Pencak, one of Penn State's foremost historians and Bishop William White expert, will share research for his upcoming book, which includes historical perspective on the founding of The Episcopal Academy. All are welcome!

