

# A GIFT TO LAST A LIFETIME

FRANCIS PARKER SCHOOL PLANNED GIVING NEWSLETTER

SPRING 2021

## Leaving a Legacy: Providing an Educational Pathway to a Promising Future

"From the moment I came to Parker, I knew this was a special place; a place where students not only learned but where foundations for successful futures were built," says Gert Koppel, when asked about his first visit to Parker in 1998.

Koppel knew firsthand the importance of a good education. From humble beginnings, Gert was born in Hamburg, Germany in 1927 and attended public school until he was forbidden to attend alongside his German classmates because he was Jewish.

He was sent to Belgium alone at a young age to escape the Nazis. In and out of school, Gert was denied a proper education throughout his childhood. Through the kindness of strangers who helped him along the way, he survived, reconnected with his family in South America, and made his way to San Diego as an adult. Along his journey, he learned that the key to success was a good education—the pathway to a promising future.

Gert was fortunate to have found success in the import-export business and began investing in local real estate. Fast forward to 1998, when Koppel felt he was in a position to do some good in the community. He visited several schools and was drawn to Parker's reputation for excellence.

Impressed by the School's philosophy, academic rigor, and leadership, Koppel immediately knew he wanted

to help students who may otherwise not have been able to attend Parker.

Gert felt it was important to teach people about the Holocaust and honor the memories of those who perished. Following his heart, he wrote a book, "A Vanishing Act, My Flight from Germany" sharing his life story of persecution and survival, separation and reunion, narrow escapes, lasting friendships, and ultimate freedom. The Gert Koppel Holocaust Memorial Scholars Program at Parker was established in 2001, which Koppel funded through annual donations.

Each year, Koppel and his wife Aline would meet with the Koppel Scholars. They took a keen interest and great pride in each of them.

Prior to his passing in 2007, he and Aline discussed their commitment to endowing his gift to Parker, allowing this Scholarship Program to continue in perpetuity. Aline was thrilled to do so as she saw how much joy this Scholarship Program brought to them both. They made provisions in their estate plan to fund the program after their lifetimes.



*Aline and the late Gert Koppel*

Aline continues to meet with and fund the Koppel Scholars annually, and today her son accompanies her, starting the process of passing the torch from generation to generation.

Gert had a special place in his heart for children and knew he wanted to help children reach their highest potential through a superb education; a luxury denied to victims of the Holocaust. He leaves behind a beautiful legacy that will always be remembered at Parker through his forward-thinking, visionary commitment to providing promising young minds the most special gift of all: access to excellence in education.

# Partnering for Parker's Future

Have you thought of how you can continue to encourage excellence at Parker for generations to come? Your support will help create a strong, sustainable future for Parker and our students.

Planned gifts can support a wide variety of initiatives, including academics, arts, athletics, faculty professional development, and student financial assistance, to name just a few. Every gift will impact the educational journey and enhance the experience of Parker students. We understand that these priorities are important to you and your family. We invite you to contact us to discuss a variety of gift options that provide tax-incentives today and help you achieve your philanthropic goals. We can partner together to enhance Parker's future.



## What is Planned Giving?

Planned giving is the art of designing charitable gifts so that you realize your philanthropic objectives while minimizing your after-tax cost. Planned gifts accomplish two worthy goals at once: ensure Parker offers and exceptional education to future generations of bright students and provide financial benefits for you and your loved ones. Planned gifts are a way to honor Parker and put your own finances on firm ground.

A wide range of planned giving choices present practical options to contribute to the School's well-being that may create financial and tax advantages for you. Whether you want to put your donation to work immediately or design a plan that benefits our students after your lifetime, giving back to Parker as part of your planning will enable you to honor Parker's past and secure its future.

We invite you to think about the legacy you can leave to the Parker community.



## Gifts That Pay You Income

### CHARITABLE GIFT ANNUITY

The charitable gift annuity is among the simplest and most popular of the charitable life-income plans and may be funded with cash or appreciated securities. You may benefit from an immediate charitable income tax deduction and get relief from tax on capital gains. Payments to you may begin immediately or be deferred until the money is most needed. The latter option is particularly attractive if you have a high current income, can benefit from a current tax deduction, and/or are interested in augmenting future retirement income on a tax-favored basis. Following your lifetime, the assets remaining go to support the mission of Francis Parker School.

### CHARITABLE REMAINDER TRUST

A charitable remainder trust is popular because of the significant financial and estate planning flexibility it offers. This trust may be funded with cash or appreciated assets such as securities, real estate, or other property. You receive an immediate charitable income tax deduction and income, and may get relief from tax on capital gains. Depending on the type of remainder trust you set up, you and other beneficiaries can receive income for life or a set number of years. When the trust expires, the assets remaining in trust go to support the mission of Francis Parker School.







# Planned Giving Options

## CHARITABLE LEAD TRUST

A charitable lead trust may be an excellent way for you to transfer significant assets to your children or grandchildren without payment of gift or estate taxes, depending on how it is structured. Charitable Lead Trusts are very appealing income and wealth transfer vehicles for donors with large estates. The trust pays income to Parker for a certain period of time and then either returns the assets to you or distributes them to your heirs at your passing.

## WILL AND LIVING TRUSTS

A bequest is a statement in your will or living trust which passes a portion or all of your estate to another person, persons, or charitable organization. Charitable bequests enable you to make significant gifts that you could not have made during your life. Naming Francis Parker School (San Diego, CA) as a beneficiary of your will or living trust can reduce or eliminate your taxable estate.

## TYPES OF BEQUESTS

**Bequest of Property**—Parker receives specific assets, such as securities, an interest in real estate, or tangible personal property.

**Residuary Bequest**—Parker receives all or a percentage of the remainder of the estate after the payment of any specific bequests and all estate-related expenses.

**Contingent Bequest**—Parker is given a bequest only in the event of the death of other beneficiaries. This ensures that property will pass to Parker rather than to unintended beneficiaries, including the government.

**Sample bequest language is available online at**  
[www.francisparker.org/plannedgiving](http://www.francisparker.org/plannedgiving)



## IRA CHARITABLE ROLLOVER

If you are 70.5 or older you are eligible to make a tax-free charitable donation directly from your IRA to a charitable organization. The donation counts toward your required minimum distributions. The IRA Charitable Rollover allows individuals to give up to \$100,000 annually of their IRA distributions directly to a charitable organization such as Parker.

## LIFE INSURANCE

Implementing a new life insurance policy makes it possible for you to convert all premium payments into a much larger gift of the insurance proceeds at death and to receive annual tax deductions for the amount paid.

## RETIREMENT PLAN

A simple way to make a gift is to name Parker as a beneficiary of all or part of what might remain in your retirement plan upon your passing. Such a gift is not subject to income or estate taxes when paid to Parker, a charitable organization.



## WE'RE HERE TO HELP!

The Parker Advancement staff is available to answer your questions about planned giving.

**Shara Freeman Hoefel**  
Assistant Head of School  
for External Relations  
858/569-7900 ext. 4106

**Debbie Kempinski**  
Sr. Director of Development  
and Stewardship  
858/569-7900 ext. 4139

# Members of the Legacy Club

Members of the Legacy Club play an integral role in securing Parker's future through planned gifts. Since most of these generous gifts will be realized by Parker after the donor's lifetime, the Legacy Club was created to thank donors for their intentions during their lifetime. Please visit [www.francisparker.org/plannedgiving](http://www.francisparker.org/plannedgiving) to learn more.

The Anklesaria Family  
Daniel '88 and Susan Frazee  
Sammy Gross '71  
Christine Hickman and Dennis Ragen  
Julie Johnson Iavelli '49  
Gert\* and Aline Koppel  
Lawrence Leffler '80  
Morton\* and Betty Jean Lichtman  
John and Carol Lindholm  
Marc Matys and Robert Gleason  
Timothy and Rhonda McIntire  
Romeo and Mila\* Quini

John '84 and Desiree Romero  
Leslie and Marjorie\* Rose  
Dorothy Shumway  
Mitch and Elizabeth Siegler  
Jeff '75 and Karen Silberman  
Jim\* and Reggie Smith  
Sandra Snook  
Michael and Catherine Thiemann  
Anne Stephens Vafis '51  
James and Kathy Waring  
Anonymous

*In Memoriam Members:*  
Margaret Simison Calhoun '32  
Esther E. Cleaves  
Adele Rice Foster '23  
Amelita Galli-Curci  
Rosalind Harris '29  
Bruce R. '32 and Mary Hazard  
Helen-May Marcy Johnson  
Ethel Mintzer Lichtman '40  
Henry '29 and Ruth Lippitt  
Mary C. Moore

*\* deceased  
(list updated 5/1/2021)*

## Thank You

Thank you to all our Legacy Club members for your wonderful commitment to the Parker community—for today and tomorrow.

If you have not yet thought about your legacy to Parker, we invite you to join the Legacy Club. Your planned gift will have a long-lasting impact on the Parker community for generations to come.

If you have already included Francis Parker School in your estate plans, thank you! Please contact the Advancement Office so we can welcome you into the Legacy Club and thank you for your support and generosity.



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PARKER  
SCHOOL