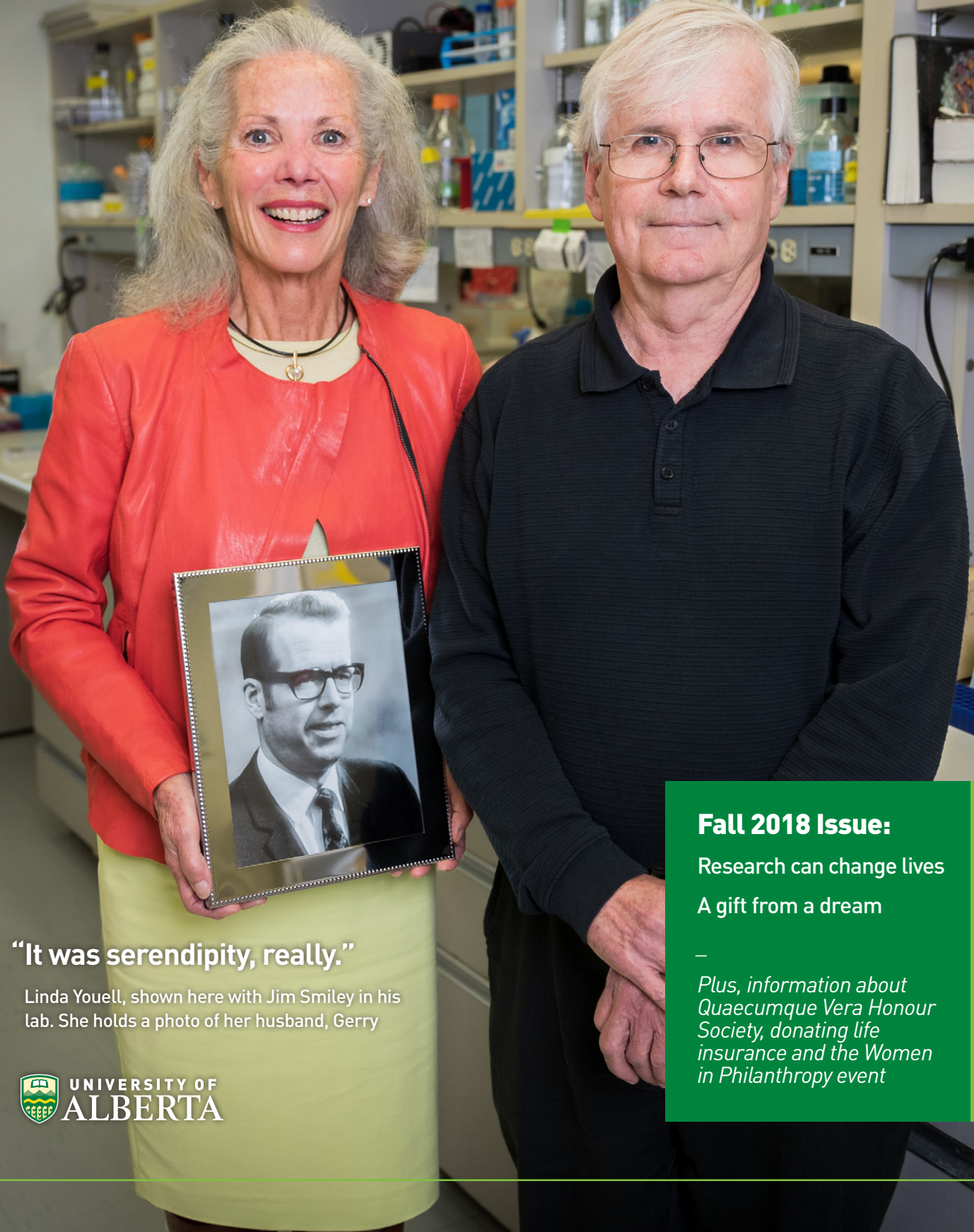


# Your Legacy



**“It was serendipity, really.”**

Linda Youell, shown here with Jim Smiley in his lab. She holds a photo of her husband, Gerry



## **Fall 2018 Issue:**

Research can change lives

A gift from a dream

—  
*Plus, information about  
Quaecumque Vera Honour  
Society, donating life  
insurance and the Women  
in Philanthropy event*



Gerry's gift made it possible to fund the work of experienced researcher Bianca Dauber.

## Seeing value in the basics

Gerry Youell chose to support basic science, a first for one researcher's lab

BY MIFI PURVIS

Gerry Youell was a man who loved life. His many friends were attracted to his fun-loving and easygoing company. He was a lover of good food and music — and wine, as long as it was what he called “good value.”

“Dad was a great person to share time with,” says Gerry's daughter, Lorea Chilton. “He was a lover of his relaxation time with his friends and family.”

He was disciplined, thoughtful and unassuming in life and work.

“Because of this discipline, he was a very successful petroleum engineer,” she says. “He was an excellent and respectful communicator and a man of integrity — a true gentleman.”

Gerry spent his career at the Edmonton-headquartered Chieftain family of companies.

“He liked to be second-in-command,” says Gerry's widow, Linda. “He was happy to let others lead.”

Yet Gerry showed true leadership when he chose to earmark a gift in his estate for basic research. The goal of basic research is to improve our understanding of how nature and

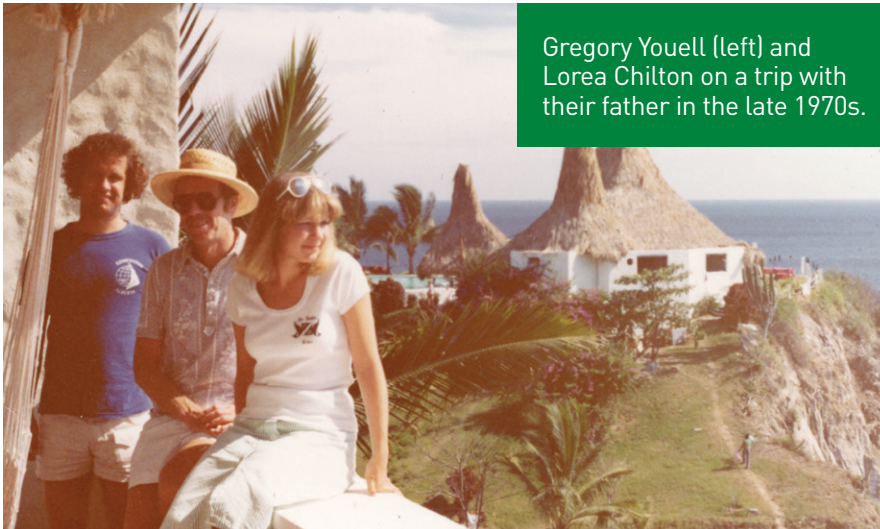
people work. Gerry, a friend of the University of Alberta, recognized that basic research is truly a good value, with the potential to generate applied solutions for many years. After he died, his gift went to the study of the herpes simplex virus.

The herpes virus is ubiquitous. It takes up residence within nerve cells and mostly just chills out there. It can reactivate, and when it does, it expresses itself at the end of the nerve — any place that particular nerve ends. An unlucky few, like Gerry, suffer more frequent and more intense outbreaks.

“Gerry was plagued by cold sores,” says Linda. Anything could trigger an outbreak: heat, wind, sunshine.

“Every time he came back from a trip, and he travelled a lot for work and pleasure, he would have blisters,” says his son, Gregory.

Gerry learned that Jim Smiley, Canada Research Chair in Molecular Virology and a virology professor at the University of Alberta, researches herpes viruses. They also learned that public support for basic research like Smiley's is falling in Canada.



Gregory Youell (left) and Lorea Chilton on a trip with their father in the late 1970s.

Fortunately for Smiley, Gerry had an abiding sense of the value of such research and an understanding that basic research is the foundation atop which innovation and practical applications can happen.

For most of us, herpes simplex viruses, or HSVs, are an annoyance, causing cold sores or sexually transmitted diseases. Both can be fairly well controlled in healthy people. But, throw in, say, cancer treatments and the problems become more pronounced.

One HSV relative, cytomegalovirus, has few or no symptoms in adults but can be passed to the fetus during pregnancy, Smiley says. "It's the single most common cause of birth defects."

Plus, he says, viruses are unpredictable. Sometimes they can reactivate in the brain rather than on the lip, with devastating consequences. Any major insights into HSVs could offer understanding into how other viruses, such as chickenpox, rabies or influenza, work.

Gerry's gift allowed Smiley to fund a researcher, Bianca Dauber, who originally came to the U of A from the

Robert Koch Institute in Berlin, for two years.

"She brings insight, experience, technical skills and imagination," says Smiley. "She has pushed forward research."

After Gerry died, Linda worked with the U of A to find the best way to use Gerry's gift. She toured Smiley's lab and heard about his work.

"It was serendipity, really," says Linda. "Before Gerry died, we happened to read an article about cold sore research at the U of A."

Smiley's lab appealed to Gerry as a great place to support, and his children, Lorea and Greg, ensured it happened. The family and the researchers, together, hope that one day, Gerry's gift will lead to effective treatments and even prevention.




**QVHS luncheon**  
**Calgary - May 8, 2019**  
**Edmonton - May 14, 2019**

## Quaecumque Vera Honour Society

The University of Alberta takes great pride in recognizing donors. When you make a gift through your will or another deferred gift, you become part of the Quaecumque Vera Honour Society, a group of like-minded donors who value a lifetime relationship with the university. The society was named after the university's motto, which means "whatsoever things are true."

### As a QVHS member you will:

- enable outstanding achievements in learning, discovery and citizenship in a creative community
- help build one of the world's great universities for the public good
- create and sustain a vibrant and supportive learning environment that discovers, disseminates and applies new knowledge through teaching and learning, research and creative activity, community involvement and partnerships
- help the U of A take a lead role in placing Edmonton, Alberta and Canada at the global forefront of innovation for generations to come
- be invited to special events where you will meet our students and faculty and hear words of thanks from leadership

By sharing your plans with us during your lifetime, you will help us ensure your legacy is fulfilled.

## A journey interrupted, now completed

BY SCOTT ROLLANS



“I’m very proud of my education. It has certainly done well for me, even if things didn’t quite turn out as originally planned.”

Kenneth Doll, '88 BA, '89 BA(Cert), '91 MA, '94 BCom

People often want to acknowledge the university faculties that shaped their careers. Kenneth Doll, '88 BA, '89 BA(Cert), '91 MA, '94 BCom, is taking a uniquely different approach by leaving a generous gift to the law school that turned him down.

Doll first enrolled at the University of Alberta hoping to become a lawyer.

“I entered university as a mature student — although the ‘mature’ part is debatable,” he says with a laugh.

“At 25, I was at a point where I thought, ‘You better go now or forget about it.’ I had owned a business, a gas station, for five years. I sold that and used the money to go to university.”

Doll completed a bachelor of arts degree, majoring in political science with a minor in economics, and then applied to the U of A’s Faculty of Law, along with several other law schools.

Much to his disappointment, they all turned him away.

Thinking a graduate degree might boost his chances, Doll spent the next couple of years completing his MA in political science. He applied to law again — and again found himself on the sidelines.

“So, there I was, with a master’s, and I still can’t get into law school. I was a little miffed, then.”

As a plan B, Doll decided to complete a bachelor of commerce and pursue a different career.

Even with his degrees, Doll had a hard time competing for jobs. It was then he made a crucial life decision: he would forever place his law-school disappointments behind him.

“I sat myself down and had a little chat with myself, and said, ‘This is life. You can either whine about it or make the best of this.’”

And make the best of it he did. Doll built a successful career in financial and estate planning, eventually opening his own Calgary-based firm, Wealth Architects. He also rose to the top of his industry to serve as chair of the Alberta Insurance Council. Over the years, he found himself more and more grateful for (and proud of) his accomplishments at the U of A. He decided to give back.

“As an estate planner, I help people set up their philanthropy — using life insurance for their legacy. So, I am practising what I preach. I thought,

‘Hey, I should do that myself!’”

In setting up his own gift, Doll devised an immensely gracious, almost poetic gesture. He decided to create a pathway to allow others to complete the law school journey he had hoped to make himself.

“I wanted to use my life insurance to create a spot for a mature student to be accepted into law school,” says Doll. “For somebody who might not otherwise get in, which was my situation. Maybe I can turn that into a positive for somebody else.”

In doing so, he has banished any lingering regrets.

“I’m very proud of my education. It has certainly done well for me, even if things didn’t quite turn out as originally planned.”

Whereas others might have held on to sour grapes, Doll harbours only warm memories.

“Those were the best years of my life,” he says. “I earned three degrees. I was there for eight years. I just thoroughly enjoyed it. It’s a special place for me.”

• • •



Carla Prado

## Women in Philanthropy

At the heart of philanthropy lies a desire to help others succeed. When a group of more than 70 women gathered this past spring for the University of Alberta’s inaugural Women in Philanthropy event, they all had the same thing in mind: the impact they could have through philanthropy.

The afternoon featured a panel discussion about how to make philanthropic decisions and why they’re important, as well as tax tips. Carla Prado, director of the Human Nutrition Research Unit in the Department of Agricultural, Food and Nutritional Sciences, also gave a presentation called “Body Composition and Women’s Health: Why Should We Care?”

She talked about how body weight and body mass index don’t detect body composition and the fact that two people can weigh the same and have different amounts of fat and muscle.

She said the best way to figure out your percentages of fat mass and fat-free mass is with the “Bod Pod,” a machine in her unit that measures fat and fat-free weight.

Prado offered health tips for anyone, no matter what body type:

- Eat a balanced diet
- Stay away from fad diets
- Consume quality proteins
- Ensure you get enough Vitamin D
- Eat N-3 fatty acids from salmon, tuna, mackerel and sardines
- Exercise for 30 to 60 minutes five times a week
- Learn your body composition (percentages of fat mass and fat-free mass) in the Bod Pod
- Find out how many calories you burn in a day using the whole-body calorimetry unit at the Human Nutrition Research Unit

To book an assessment in the Bod Pod or with the whole-body calorimetry unit, go to [public.hnru.ualberta.ca](http://public.hnru.ualberta.ca) or phone 780-492-2196.

*If you would like to be contacted about the next Women in Philanthropy event, please contact Kathy Fitzgerald at 780-492-2616 or [kathy.fitzgerald@ualberta.ca](mailto:kathy.fitzgerald@ualberta.ca). The next event will take place in Edmonton in spring 2019.*

## A Gift of Life Insurance

If you want to make a lasting contribution to the University of Alberta while ensuring your family is looked after, consider a gift of life insurance. Donating life insurance can also have considerable tax benefits.

### Here are two options:

1. Name the University of Alberta as a **policy beneficiary**. You retain ownership and control over the policy, bypass probate fees and can apply the tax receipt to your final tax return.
2. Name the University of Alberta as **owner and beneficiary of a new or existing policy**. You receive a tax receipt now for fair market value of the policy (if transferring an existing policy), as well as a tax receipt for all subsequent premium payments.

### How It Works

An alumna gifts an existing, paid-up whole life insurance policy that has a death benefit of \$100,000 and a cash surrender value of \$35,000. The donor gets a tax receipt for the fair market value of the policy (to be determined by the life insurance company). With a gift of life insurance, the donor will become a member of the Quaecumque Vera Honour Society (QVHS), our special recognition society.



## Receive a FREE Estate Planning Organizer

The University of Alberta estate planning organizer helps you keep track of your important documents now so that you can provide your family with a written, comprehensive list of where papers are stored and who to contact in the event of your disability or death.

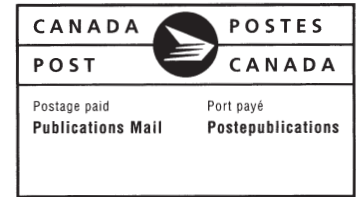
To order your complimentary copy, please contact us at **780-492-4418** or [giving@ualberta.ca](mailto:giving@ualberta.ca).



Or download a copy at [uab.ca/estates](http://uab.ca/estates)



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 Planned Giving  
 3-501 Enterprise Square  
 10230 Jasper Avenue  
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## We would like to hear from you

The Quaecumque Vera Honour Society recognizes donors who have notified the University of Alberta of a gift in their estate plans. If you have already provided for such a legacy gift, we would like to welcome you into this special group and learn about your future plans.

To notify the university, or to learn more about making a legacy gift, please complete and forward by mail, fax or email.

All contacts are treated with the strictest confidence and entail no obligation.

- I have already made a legacy gift to the University of Alberta (bequest, insurance, an RRSP/RRIF or other) and have not yet told you about it.
- Yes, I would like more information about making a legacy gift to the University of Alberta.
- Yes, I would like more information about making a gift to the University of Alberta while receiving a life income.
- Yes, please send me my complimentary copy of the University of Alberta's estate planning organizer.

Please provide the following information:

Name: \_\_\_\_\_

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Tel: \_\_\_\_\_ Email: \_\_\_\_\_

If you prefer to speak with someone directly about the various options, please contact Kathy Fitzgerald, Interim Director, Planned Giving:

Tel: 780-492-2616  
 Toll-free 1-888-799-9899  
 Fax: 780-492-1862

Email: [kathy.fitzgerald@ualberta.ca](mailto:kathy.fitzgerald@ualberta.ca)

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 3-501 Enterprise Square, 10230 Jasper Ave.  
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Kathy Fitzgerald, Julian Solberg and Brian Shea

We hope you enjoyed reading the Fall 2018 edition of *Your Legacy*, the University of Alberta's semi-annual planned giving newsletter. We would love to hear your thoughts and comments on this newsletter.

Please feel free to contact us if we can be of any assistance in fulfilling your personal legacy goals.

The information presented in this newsletter is of a general nature and is not intended to substitute for professional financial or legal advice. Please consult your own financial or legal advisors before finalizing a legacy gift to the University of Alberta.