

# Reflections

Summer 2004



The Planned Giving Society of the USI Foundation

## Leaving a house in good hands...

*A gift of real estate to the USI Foundation can generate a substantial tax deduction while the donor and beneficiaries enjoy use of the property as long as they wish*

Active, engaged, upbeat, vibrant, interested in everything around her—those are the words that friends and family of Victoria Wertz use when they describe the soon-to-be centenarian. She was born August 28, 1904.

Wertz is a longtime friend of the University of Southern Indiana. In 1994, she moved from her residence in Evansville into a high-rise apartment where she had a beautiful view. “If I got up early, I could see the sunrise, and in the evening I could see the sunset,” she said. She later moved to the Evansville Protestant Home where she continues to reside. No longer needing her home, she gave it in 1995 to the USI Foundation. It was sold with proceeds going to create the Wertz Nursing Faculty Enhancement, an endowed fund that provides professional development for nursing faculty.

Dr. Nadine Coudret, dean of the School of Nursing and Health Professions, said, “I became her friend through my husband [Duke Coudret], who knew Victoria and her family. She has a zest for life and is interested in what is occurring in our school and in the University.”

The faculty fund which Wertz established has made it possible for nursing faculty to stay on the cutting edge of new clinical information. Because of the funding, the school has been able to send nursing faculty to national conferences on critical care nursing, advanced practice

“**Victoria knows that we’re going to do the right thing with the fund.**”



—Dr. Nadine Coudret, Dean  
USI School of Nursing and Health Professions

nursing, gerontology nursing, and annual classroom and clinical teaching institutes. Nursing faculty have had support to present research at the Midwest Nursing Research Conference and other national conferences.



**Victoria Wertz**

“Victoria knows that we’re going to do the right thing with the fund and that faculty share her goal of educating nurses who will give the best care possible to their patients,” Coudret said.

According to Jay Wertz of Evansville, the health-care field is of special interest to his mother. Her stepdaughter Barbara Jeanne Worthington was a medical technologist; her daughter Judith McMurry was a nurse. Both are deceased.

Jay Wertz also said that his mother has enjoyed a longtime acquaintance with Betty Rice, former USI first lady. President Emeritus David L. Rice and his wife recalled that the Wertz family business, Maley and Wertz Lumber Company at 900 E. Columbia Street in Evansville, cut yellow poplar from the land owned by Southern Indiana Higher Education, Inc., and kiln-dried it for use as cabinetry and paneling in the University home which opened in 1983.

## Leaving a house in good hands. ..

continued from page 1

“My husband was proud of that,” Wertz said.

Born Victoria Howard in Owensboro, Ky., Wertz came to Evansville to attend Lockyear Business College. She then became secretary to Daniel P. Wertz, who in 1901, along with Henry Maley, had bought and renamed the Evansville plant of the Thompson-Bonnell Lumber Company. In November 1930, she married Daniel Wertz’s son Claude, who also was associated with the family business. His first wife had died, leaving him with a young daughter Barbara Jeanne. Claude and Victoria Wertz had two children, Judith and Claude Jr. (Jay). The couple had been married 57 years when Claude Wertz died in 1987 at age 90.

“I enjoyed married life,” Wertz said. “Those were my happiest years. I also loved my husband’s parents and had a wonderful association with them.”

From the time she was a young girl, Wertz enjoyed an active lifestyle. In Evansville, she was a member of the women’s basketball team at Central Turners, a downtown club, which won a state championship in 1924-25. The team photo hangs now where she sees it every day.

She also was a member of the YWCA Aqua Maids, a swimming group that gave exhibitions throughout the area. Later she played golf, won quite a few ribbons with her saddlehorse, and belonged to the Flower Growers Garden Club, especially priding herself on the brilliant red azaleas that surrounded her home. She also enjoyed traveling with friends to Europe and South America.

As Wertz approaches her 100th birthday, she continues to live life with purpose.

“I think being active makes you more mentally alert,” Wertz said “I still like to have on a little rouge and lipstick.” Her interview and photo for this newsletter were scheduled around seated exercise and other activities in which she regularly participates.

Wertz knows that the funds from the sale of her home are in good hands with the USI Foundation and will be a force for improving the knowledge and skills of nursing faculty for many years to come, thus leading to better health care in the region. “I believe USI is something good—something to the advantage for Evansville,” she said. “I have faith in the University of Southern Indiana.”

### **Gift of real estate with life estate agreements**

A gift of a residence, farm, or vacation home can be made today without giving up the use and enjoyment of the property during your lifetime.

This type of gift is easy to complete and generates a significant federal income tax deduction. You and your family members may continue to live in, maintain, and enjoy the property as long as you wish. At the time you designate, or upon the death of the last beneficiary, the property will transfer to the USI Foundation. The USI planned giving staff can provide individualized details.

### **Your annual gifts can continue forever**

The University of Southern Indiana depends on many loyal friends and alumni who make annual gifts which help the University underwrite student scholarships and enhance its educational programs. When a benefactor dies, then that support ends.

You can continue your commitment to support higher education on an annual basis beyond your lifetime by including the USI Foundation in your will. With a bequest to the USI Foundation, you can continue your annual support where the need is greatest or to sustain specific programs which were important to you during your lifetime. You can create a permanent legacy. Here is how to accomplish that:

You can perpetuate your annual support of:	With a bequest of:
\$ 450	\$ 10,000
\$1,125	\$ 25,000
\$2,250	\$ 50,000
\$3,375	\$ 75,000
\$4,500	\$100,000

*\*Assumes an average annual rate of return of 4.5 percent on bequests received by the USI Foundation.*

*This newsletter is for information only. For specific legal and tax-planning guidance, please consult your professional advisers.*

**For more information or other gift-planning ideas, return the enclosed reply card or contact the USI Foundation. David A. Bower • USI Foundation • 8600 University Boulevard • Evansville, IN 47712-3596 • 812/464-1918**



**LEAVE A LEGACY™**  
In Evansville and the Tri-State Area

*You can make a difference in the lives that follow.*

*Leave A Legacy is a community-based effort that encourages people from all walks of life to make gifts from their estates to the nonprofit organizations of their choice. This program is sponsored in Evansville by the National Committee on Planned Giving through the Evansville Area Fundraising Council.*