

Reflections

Fall 2011



The Planned Giving Society of the USI Foundation

Today vs. tomorrow...

Today's most critical needs are not necessarily the most pressing needs of the future. An Evansville couple's unrestricted planned gift will allow the University to respond quickly to emerging needs.

When Dr. Edward L. Brundick Jr. and Holley Brundick moved to Evansville in 1971, they identified with the University of Southern Indiana. They were new to the area, and the University, established in 1965, was a relative newcomer as well.

The couple settled in Evansville after Dr. Brundick completed nine years as a surgeon in the U.S. Air Force,



Edward L. and Holley A. Brundick

(1977-2004) as USI's team doctor and nearly 20 years at Central High School.

In 2001, the Brundicks named the USI Foundation as a beneficiary of their charitable remainder trust.

"We felt that USI was a part of our family and a significant part of the community," Dr. Brundick said. "We made our living in the community and wanted to give back to an organization that was part of the community. We couldn't think of a better organization than USI."

The Brundicks' planned gift is unrestricted. "We thought an unrestricted gift would most help the University," they said. "We want the University to make the decision to utilize the gift in whatever way serves the most pressing needs."

Unrestricted gifts are of great value to USI because of their flexibility. They allow the University to support

unexpected opportunities associated with financial aid, innovations in teaching, research equipment, facilities, or other challenges across campus.

Both Missouri natives, the Brundicks grew up on opposite sides of the state. He is from Pacific, about 40 miles west of St. Louis. She is from Harrisonville, about 40 miles south of Kansas City. He completed an undergraduate degree at the University of Kansas. They met in the middle of their home state at the University of Missouri when he was a medical school student and she was an undergraduate studying secondary education.

The choice of orthopaedic surgery as his specialty reflects Dr. Brundick's interest in athletics and helping athletes with injuries. A student athlete in basketball, track, and baseball, he played professional baseball in 1953-54 with the Baltimore Orioles in its minor league system. As team physician, he enjoyed continued association with athletes and the University in general.

"We always thought we were on the forefront of medical care for athletes," Brundick said of his service to USI teams. For instance, new student athletes at USI were screened with ultrasounds to detect heart problems at least a dozen years before prominent Division I schools were in the news for doing so.

In 1998, Dr. Brundick was selected to receive the Indiana State Medical Association Team Physician Award. Active in several professional organizations, he was one of the first members of the American Orthopaedic Society for Sports Medicine.

Longtime Varsity Club members, the Brundicks have supported a variety of USI initiatives. They are avid golfers and as a member of Victoria National Golf Club, Dr. Brundick was influential in arranging for USI Athletics to be the beneficiary of the prestigious Victoria National Endowment Tournament, which he chaired in 2002. They have embraced the arts and academics through gifts to New Harmony Theatre and the Linda and H. Ray Hoops Endowed Presidential Scholarship. They provided financial support for the inaugural ceremony honoring USI President Linda L. M. Bennett in 2009 and have made a gift-in-kind to help furnish the University Home.

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Today vs. tomorrow...

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For several years, the Brundicks hosted the USI "Florida Friends" event when they had a home in Sarasota.

In recognition of Dr. Brundick's extraordinary service to his profession and the University, USI awarded him an honorary Doctor of Science degree in 1999. In 2008, he was selected to become a member of the USI President's Circle, which recognizes individuals whose personal volunteer efforts, advice, and expertise have been consistently present in shaping the University.

In 2008, Orthopaedic Associates honored Dr. Brundick's service by naming its new building for him. In retirement he works part time at the Evansville Veterans Affairs Outpatient Clinic.

The Brundicks have been board members for Deaconess Hospital and its Foundation. Holley has applied her gardening expertise caring for the rose beds at St. Mary Catholic Church, where the Brundicks worship. She was president of the Vanderburgh County Medical Auxiliary and took an active role in their children's school and extracurricular activities, serving as president of parent-teacher associations at Central High School and Highland Elementary School.

The Brundicks have three children and seven grandchildren. Their daughter, Missy McNabb, is a teacher at Corpus Christi School in Evansville. In spring 2003, she was recognized at USI as the Outstanding Graduate Student in Elementary Education. She completed a Master of Science in Education in 2006 and the principal licensure program in 2009, both at USI. She and her husband, Scot, manager of business development at WB Koester Construction, have two children: Hannah, 21, a nursing student at the University of Evansville, and Wade, 17, a senior at Memorial High School. Their son, Edward, an attorney, is managing director and head of the private client group for Duncan-Williams, Inc., in Memphis, Tennessee. He and his wife, Ginny, have three children: Mary Olivia, 7; Annie, 5; and Louis, 3. Their youngest, Michelle Duever, is the global business development manager for Proctor & Gamble. Her husband, Tim, is senior executive director of physician development for Christ Hospital in Cincinnati, Ohio. They are the parents of Micaela, 13, and Ryan, 12.

Charitable remainder trust

A charitable remainder trust is a vehicle you can use to make a donation to benefit future students at the University of Southern Indiana while receiving tax benefits and generating income for yourself. With a charitable remainder trust, you can take a federal income tax deduction in the year of the gift and you can receive an annual income during your or your beneficiary's lifetime.

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.*

Concerned about the level of your Social Security income? Would you like to have more income and help USI at the same time? Call the USI Foundation and ask how you can do both with a charitable gift annuity.

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

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, Indiana 47712 • 812/464-1918 • www.usi.edu/foundation



LEAVE A LEGACY®
In Evansville and the Tri-State Area
Make a Difference in the Lives that Follow

Leave A Legacy® is a community-based effort that encourages people from all walks of life and all income levels to make gifts from their estates to the nonprofit organizations of their choice. This program is sponsored in Evansville by the Partnership for Philanthropic Planning through the Evansville Area Fundraising Council.