

# Reflections

Fall 2010



The Planned Giving Society of the USI Foundation

## Alumni: get involved early...

*An alumnus from the first graduating class stays connected to the University with his time and financial support, including a bequest expectancy that will help shape USI's future*

Robert C. Roeder remembers June 2, 1971, as a proud day. A student leader, he was among 151 degree candidates in the University of Southern Indiana's first Commencement. Family and friends at the outdoor ceremony watched the procession of graduates file past the library, opening that same year. Other buildings on the budding campus were the Science Center and Administration Building and the Temporary Union Building. Enrollment was 2,171 students.

Now, USI's expansive suburban campus includes 12 major buildings, four residence halls, and two apartment complexes as well as a host of support facilities and outdoor athletic and recreation areas. Enrollment in fall 2009 was 10,516 students.

While the campus has evolved from its early days into a bustling wired center for higher education, Roeder finds commonality with 2010 graduates.

"I continue to be amazed at one point," he said. "The accessibility of the faculty to students is an advantage that alumni always confirm. Not only do we have great educational programs, a gorgeous campus, and strong athletics, but we also have a faculty that is readily available to students."

Roeder credits the faculty commitment as a significant factor in his experience at USI. He worked full time at Whirlpool Corporation to finance his education.

"There were times when I needed to talk to professors about a point or explain that I had to work a particular

**“ Build strong relationships  
and be committed to making  
a difference. ”**

shift," he said. "I always found professors accessible and willing to listen. It's part of the culture of our University."

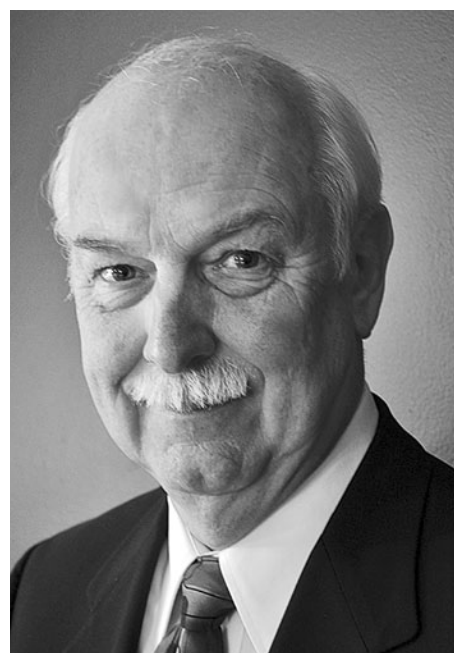
Roeder remains grateful to the community and business leaders who recognized the need for a state-supported institution of higher education in Southwest Indiana. He takes pride in giving both time and financial support to a University that means so much to him.

"The people who many years ago had the foresight to donate the land that ultimately became USI created an opportunity for me to go to college. Had it not been for them, I could not have worked at Whirlpool and finished my college degree in five-and-a-half years," he said.

Roeder has stayed closely connected to the University throughout the years. As spring 2010 Commencement speaker, he urged new alumni to start early and do the same.

"Life is about relationships," he said. "In your involvement in your home, your community, your church, your city, and your nation, always recognize you are building relationships that can impact your career. Build strong relationships and be committed to making a difference. The relationships I built in my church, at USI, in state government, in the Indianapolis Jaycees, and in many other activities provided my opportunities for career growth."

A management graduate, Roeder has more than 38 years of experience in the field of human resources. In 1976, he was appointed director of human resources for the State of Indiana, becoming the youngest personnel director in the 50 states. He is now a principal and senior human capital consultant in the Indianapolis office of Mercer, a global provider of consulting, outsourcing, and investment services. He is a nationally recognized specialist regarding employee total rewards, strategic compensation, and executive compensation. He works with clients ranging from small family-owned companies to Fortune 500 companies.



**Robert C. Roeder**

*continued*

## Alumni: get involved early...

continued from page 1

As a student, Roeder was the first president of the Student Union Board (now Activities Programming Board). Founding members had a voice in long-lasting decisions such as the selection of the eagle as mascot. Roeder also gave leadership to a student campaign to acquire books for the library and a student committee that advocated making the school an independent state university. Roeder received the Outstanding Student Achievement Award in 1971 and the first Distinguished Alumni Award in 1978. He is a past member of the Alumni Council.

His touch continues to reach the University community in many ways. He was instrumental in establishing the network of Indianapolis-area alumni. His company is a Gold Sponsor of the golf scramble that supports scholarships provided by the Indianapolis Alumni Chapter. He regularly attends alumni events such as the recent USI Day at Churchill Downs.

Roeder has been a director on the USI Foundation Board since 1995. It was his idea to establish the Suzanne A. Nicholson Leadership Award for strong leadership by a USI Foundation Board member. The award honors the late president emerita of the USI Foundation and director emerita of University Development for whom it is named. Roeder is a member of The President's Associates, a group

of the University's most generous donors. He supports the USI Annual Fund.

In 2006, he became a member of USI's planned giving society, *Reflections*, upon establishing a bequest expectancy.

Roeder has not finalized the details of the bequest, but he plans at this time for it to be unrestricted to allow latitude for the University to use the gift for its highest priorities. In giving to the Annual Fund, Roeder often provides stock that is highly appreciated.

"It's a better deal for me," he said, referring to the tax advantages. "The same thing is true when giving from an estate. When available, a gift of highly appreciated stock is advantageous."

Roeder and his wife Mary have two adult children. Their son Jeffrey and his wife Ramie live in Indianapolis where Jeff is deputy chief of staff for the mayor. Their daughter Gretchen Holquist works in marketing for Johnson & Johnson in San Jose, California. She and her husband Corey have two young sons, Jeremy and Ryan.

Roeder's bond with USI will never end. His planned gift is an investment in Indiana higher education and a connection to all the University will do in the future to benefit students and enhance the community and regions beyond.

## Wills and other estate plans

A gift in your will or other estate plan to the USI Foundation can result in significant tax savings to your estate and will benefit students pursuing higher education. You may direct the Foundation to use the gift where the need is greatest, or you may designate it for a University need which reflects your special interest or concern.

### 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**



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.*