Class of 1958 50th Reunion
For us now, For Carleton later

'T58 and Carleton. We've been an engaged class through the years. Many of us have worn several hats over these decades, first as Carleton students, then as alumni, and some of us as College volunteers.

Having been class agent, then a member of the staff as the first executive director of the Alumni Annual Fund, I had the opportunity to experience our alma mater from the inside. Steve Lewis put a strong focus on alumni activities and stewardship, and that emphasis continues today in many ways. Next, I had the honor to be elected an Alumni Trustee and was proud of the excellent governance at Carleton. Now, back to a volunteer, and being part of our 50th Reunion Committee. It sure is fun reconnecting with so many classmates. This new role is a real joy.

And...joy...the joy of giving! 2007 enables all of us (provided we are 70 ½) a huge opportunity to gift a maximum of $100,000 directly from our IRA—with no taxable consequences and the gift counts toward the minimum required distribution. Carleton wins, and so does each donor. Chuck, my husband of 8 years, offered to match my IRA gift with his. What a win-win! We both feel most pleased and also very good about maximizing this opportunity which helps Carleton today and in the future.

It may make more sense for some of us to keep our IRAs intact for our own use, and that of a spouse (if this applies). In that case, please consider making Carleton a beneficiary of your account when you are gone. The staff will show you how this can be accomplished.

Many have stretched to provide the investment in Carleton...we are happy to be among this group.

Tucky McCarthy Elliott '58

Thinking about philanthropy is part of the bigger picture—what we want to accomplish with our lives and our resources. Sally and I used this opportunity to work with our professional advisors to set a plan in motion that will maximize the benefits to our family members, our charitable interests, and our communities. At the same time, we’re minimizing the tax bite that would apply if we did not have a plan.

Everyone needs a plan, regardless of the size of our estates. The key is to determine what you want to do, then instruct your attorney or other advisors. Your advisor’s role is to accomplish your goals.

I hope that philanthropy for Carleton is among your goals. If so, the staff at the College is willing to help you with that part of your arrangements. You can provide for Carleton in your will or from your retirement plan; you can make a gift now, but keep the income for your lifetime; or you can give now outright and get the maximum tax deduction.

Start the planning process now. If we can do it, so can you. Besides, you will be surprised at how much fun you will have knowing that you are accomplishing your goals.

We’re looking forward to seeing everyone at the Reunion.

George Wells '58, Sally Bramlette Wells '59

For more information about ways to make a 50th Reunion Gift, you may contact Mari Aylin or Mike Tompos '83 in the Carleton Development Office. The toll-free number is: 800 492-2275.

Thank you.