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Puente de Oro Society

Puente de Oro is Spanish for “Bridge of Gold.” It signifies gifts of extraordinary generosity from one generation to another. Through such benevolence — which is not marked by levels of giving, but generosity of spirit — planned giving donors ensure USD will continue to excel, meeting higher aspirations with each graduating class.

Upcoming Events

Friday, February 9 through Friday, May 18

Art Cash: Money in Print
Robert and Karen Hoehn Family Galleries, Founders Hall
Learn more at www.sandiego.edu/galleries/

Tuesday, March 6, 10-11:30 a.m.
You May Already be a Victim: Essential Computer Security Practices for Home Users with Dr. Mark Heckman
Bridges Academy, Degheri Alumni Center
Register at www.sandiego.edu/bridges

Tuesday, March 13, 10-11:30 a.m.
Rigs to Reefs: Exploring the Future of Offshore Oil and Gas Development with Emily Callahan and Amber Jackson
Bridges Academy, Degheri Alumni Center
Register at www.sandiego.edu/bridges

Tuesday, April 10, 10-11:30 a.m.
Ellen Browning Scripps: New Money and American Philanthropy with Dr. Molly McClain
Bridges Academy, Degheri Alumni Center
Register at www.sandiego.edu/bridges

Wednesday, April 25, 10-11:30 a.m.
Environmental Protection in the U.S. with Dr. Andrew Tirrell
Bridges Academy, Degheri Alumni Center
Register at www.sandiego.edu/bridges

Tuesday, May 1, 10-11:30 a.m.
Deconstructing Racial Stereotypes with Dr. May Fu
Bridges Academy, Degheri Alumni Center
Register at www.sandiego.edu/bridges
The Economics of Paying It Forward
Retired Professor Makes an Investment in Students That Will Keep on Giving

Joan Anderson, PhD, came to the University of San Diego as one of the first economics professors in the School of Business in 1981. Olin Hall had not yet been built and there were only 17 employees in the School of Business, which would become one of the university’s fastest growing schools.

She taught quantitative and statistics courses, was active on the Social Issues Committee and in the Trans-Border Institute, and specialized in the economic development of Latin America and applied econometrics.

“In the School of Business, everyone knew everyone, but we were growing fast,” recalls Dr. Anderson of her early days at USD, when the school was located in the area that is now home to the DeGheri Alumni Center. “When we built Olin Hall we had room for 50 faculty offices and we thought it was ample space. But the business school was growing — and at one point half of the undergraduate students were majoring in business.”

The esteemed professor retired in 2009, after nearly three decades at the University of San Diego. Even in retirement, however, she’s still making a difference to students. Her most recent contribution was to establish a new scholarship for first-generation students because, above all else, she believes in the power of education.
“PAYING IT FORWARD” CONTINUED FROM PAGE 1

“One of the best investments the United States ever made was the GI Bill,” says Anderson, of the bill that was signed into law by President Franklin D. Roosevelt in 1944, to provide veterans funds for college education, as well as unemployment insurance and housing. “Because of the GI Bill tons of people who had never before been to school went to college. A lot of my students had parents who were educated as part of that program.”

A true economics professor, she explains that education is a way out of poverty and says that it starts a chain that allows graduates to thrive much better economically. Today, Anderson explains, education is getting more and more expensive and there are fewer state funds to help subsidize the cost. So scholarships, such as hers, are even more vital.

“I wanted to do something that would live on,” she says. “With my scholarship, I’m giving preference to first-generation students and students who have gone through the Reality Changers program or the Barrio Logan College Institute. For some of those students education may seem as though it’s beyond their horizon or beyond their family’s horizon. But education can truly change their reality. And I hope my scholarship can help make that happen.”

Dr. Anderson was the second chair of the Social Issues Committee, which was established in 1985, and was an early advocate of what became USD’s Service-Learning program, led by Judy Rauner who was known as a pioneer in that field. Together, she and Rauner wrote the application for a grant to launch the university’s first Social Issues Conference in 1990, featuring keynote speaker Jonathan Kozol, a writer, educator and activist known for championing issues of educational inequality and racial justice.

Dr. Anderson incorporated service-learning into her courses whenever and wherever she could. She had students take polls. In her courses about income, poverty and equality, she had students volunteer at the Salvation Army’s women’s shelter so they could hear the stories of the struggles many women faced as single mothers. She even took the students to the U.S.-Mexico border.

“For my Latin American development class we would drive to Tijuana to visit the Salvation Army’s women’s shelter so they could hear the stories of the struggles many women faced as single mothers. She even took the students to the U.S.-Mexico border.

“I've always felt a real pull to reach out,” she says. “Part of that comes from my faith and the knowledge that we’re put here on this earth to help. I’ve been given a lot and always knew I need to help a lot. Hopefully the students who benefit will do the same.”

Tax-Free Charitable IRA Distributions
It’s Win-Win Philanthropy
BY JOHN A. PHILLIPS, SENIOR DIRECTOR OF PLANNED GIVING

The law allowing Individual Retirement Account (IRA) owners who are at least 70 ½ years old to make tax-free transfers to qualified charitable organizations began in 2006. In December 2015, this provision became permanent.

Prior to 2006, the average amount of IRA Charitable Rollover gifts received by USD in one year was $61,671. In 2017, it was more than $224,000. Many of those donors had never before made an IRA gift. I believe that as more philanthropically-minded individuals become familiar with the charitable rollover, the more they will realize it’s a very smart way to make charitable gifts.

What does this mean to USD and our students? Since 2006, IRA donors have supported a variety of schools, departments, programs and other key needs across campus. Among them are:

- Scholarship endowments
- School of Leadership and Education Sciences
- University of the Third Age
- Torero Athletics
- School of Business
- Naval ROTC
- School of Law
- Joan B. Kroc Institute for Peace and Justice
- Shiley-Marcos School of Engineering
- Unrestricted use

Some donors used their IRA Charitable Rollover gifts to pay down their outstanding pledges to USD.

One can see that the IRA Charitable Rollover gifts have a significant impact at USD and on the lives of our young Toreros. I believe we will continue to see even more of these gifts in the future as our senior donors learn about the opportunity.

Fortunately the IRA Charitable Rollover is unaffected by the new tax reform. Those people 70½ or older will still be able to make tax-free transfers to support USD. Tax-free transfers from an IRA are the same as getting a 100 percent charitable deduction.

The New Year is not too early to start thinking about and planning your strategy for using your IRA to make some or all your charitable gifts in 2018!
As 2017 came to a close, Bridges Academy guests gathered at a holiday luncheon to celebrate the most recent recipients of the Bridges Endowed Scholarship. University of San Diego students Kiera McNeill ’19 and Zackary Hughes ’20 were awarded the scholarship for the 2017-18 academic year.

At the annual luncheon, McNeill and Hughes were able to share stories about their journeys leading to USD and their experiences on campus. It was also a time for the recipients to meet and thank those who donated to the Bridges Endowed Scholarship.

The Bridges Academy Lecture Series has established a presence on campus as a continuing education program for those 55 and older. Guests are welcomed to USD to enjoy a variety of lectures from leading faculty.

The Bridges Endowed Scholarship, largely supported by the attendees of Bridges Academy, has been awarded to two students each year since 2005. The growth of this fund has allowed USD to provide larger scholarships each year, greatly impacting the lives of the deserving students. The first Bridges Endowed Scholarships were awarded in 2005 for $1,000 per student. In the 2017-18 academic year, each scholarship recipient was awarded $4,100.

We hope you enjoy photos from the celebration — and we look forward to seeing you there in 2018!

For more information on Bridges Academy, the Bridges Endowed Scholarship, and scholarship recipients, please visit www.sandiego.edu/bridges.
Leave Your Legacy at USD

☐ Please send me information about:
☐ Naming USD in my estate plan
☐ Making a gift that pays me income
☐ Making a gift of real estate to USD

☐ I have remembered the University of San Diego in my estate plans as follows:
☐ I/We have named USD as a beneficiary of a will or living trust.
☐ I/We have named USD as a beneficiary in one or more of the following:
  ☐ IRA, pension, or other retirement account (401(k), 403(b) or other)
  ☐ Charitable remainder trust
  ☐ Life insurance policy
  ☐ Other (please specify)
☐ Approximate amount and purpose of gift (optional)

☐ I have remembered the University of San Diego in my estate plans as described above and I wish to join the Puente de Oro Society. Recognition options:
☐ Please list my/our name in the Puente de Oro Society honor roll listings as shown below.
☐ Please do not include my/our name(s) in the Puente de Oro Society honor roll listings.

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