DAVID BLAIR ’02 (MA), ’07 (EdD) decided to go back to school to earn a master’s degree and later a doctorate degree to make sure he was on the cutting edge while running an educational nonprofit organization.

Blair was living in Orange County in the mid 1990’s at the height of the AIDS pandemic when he was invited to talk to high school students in Laguna Beach about the importance of safe sex and the prevention of STDs. The experience eventually led him to establish a nonprofit organization called Positively Speaking of San Diego, which over the course of six years connected with more than 50,000 youth as part of a collaboration with San Diego County and the majority of the 53 school districts in the county.

“I’m taking up space and I want to make the most of the space I take up,” Blair says. “I knew if I could touch one heart, one soul, it would all be worth it.”

While leading his nonprofit, Blair worked with people who had master’s degrees and PhDs and realized the best way to advance the work of his nonprofit was to further his education. So the entrepreneur from Northwestern University came to USD’s School of Leadership and Education Sciences (SOLES), where he earned first a master’s degree and later was admitted into SOLES’ first doctorate program, earning an EdD in educational leadership.

Generally one of the oldest students in the class, Blair says he enjoyed hearing everyone’s ideas and loved presenting his own. Here are just a few of the things he learned, which served him well at his nonprofit, in his professional endeavors at other universities, and with the future business ventures that followed. In grant writing, Blair said the first ‘no’ is never the final answer. Keep trying. Supplement your studies with liberal arts. Pay attention to both quantitative and qualitative measurements. Over deliver on what’s required. And always go above and beyond.

“I’m a finisher,” he says. “If I start something, I finish it. Nothing gets in my way.”

During Blair’s time at USD, the School of Leadership and Education Sciences couldn’t wait to move into the Mother Rosalie Hill Hall, which was still under construction. Blair graduated before it opened and was never able to attend class in the new building, but he did commemorate his time at

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.
Help Further the University of San Diego's Mission with an IRA Charitable Rollover

- The law allowing tax-free charitable gifts from your IRA is now permanent.
- You must be at least 70 1/2 to make a tax-free gift directly from your IRA.
- Your gift up to $100,000 can be made all at once or in part of your Minimum Required Distribution (MDR).
- You pay no tax on the amount transferred to USD. It’s a tax-free gift and will not add to your gross income.
- IRR gifts can pay down your pledge(s).
- IRA gifts can be included in your charitable legacy.

Estate Planning 101

The USD Office of Planned Giving makes calls from alumni and friends who are creating or amending their will or trust. Usually, they want to discuss how to leave a gift to the university and need help with language. Sometimes their interest goes beyond simple bequest language. Here’s a refresher on basic estate plan considerations.

**WHAT IS ESTATE PLANNING?**

Estate planning is the process of legally putting in writing, in a will or trust, what will happen to everything one owns after they pass away. An estate plan also addresses who will assist a person should they become incapacitated.

**NO ESTATE PLAN?**

Not recommended! Should a person become incapacitated and they have no estate plan, the court may have to assign a stranger or stranger of the court’s choice, to take care of their affairs. This “conservatorship” is rigid and very costly. If a person passes away with no estate plan, the State of California will distribute assets based on state law. Most likely, the state’s distribution is different from what the person would have wanted.

**WILLS AND PROBATE**

Probate is the court-supervised administration of a will. A will is a simple document instructing how estate assets are distributed after the death of the maker. Probate administration may have advantages and disadvantages:

- **five, the advantages**
  - Court supervision beginning to end
  - Here and others to receive some of the estate are protected by the court
  - All questions and disputes of the distribution of an estate are settled under court supervision.

- **three, the disadvantages**
  - There is an orderly transfer of assets approved by the court.
  - New law changes can be starting point for estate taxes. estate is worth at least $5.450,000

**AMENDMENTS**

Both wills and living trusts can be revoked, rewritten, or amended to reflect changes in thinking or personal situations.

**MORE INFORMATION**

The Office of Planned Giving offers continued.

- **information on wills, living trusts, and other life insurance providing charitable estate planning options with no change or brand new.
  - John A. Phillips at (619) 260-4523 to learn more.

BRIDGES SCHOLARSHIP CORNER

December 2016—Bridges Endowed Scholarship recipients at a holiday luncheon. It was there that University of San Diego students Monserrat Lopez and Osvaldo Miramontes '18 had the opportunity to meet and thank donors.

The Bridges Endowed Scholarship, largely supported by the attendees of the Bridges Academy Lecture Series, has been awarded to first-time anti-student and one general education student each year since 2005. The first Bridges Endowed Scholarships were awarded in 2005 to 11 students. Just over 10 years later, in 2016, each scholarship recipient was awarded $3,800.

Monserrat Lopez

After graduating from San Diego High School of International Studies, Monserrat Lopez decided to attend the University of San Diego to pursue a degree in music and a minor in business administration. While reflecting on her four years at USD, she stated that her “experience at USD has been welcoming, supportive, and inspiring.”

Throughout her time as an undergraduate, Lopez has immersed herself in campus life. She has helped establish the first Latina sorority on campus, performed musical ensembles, participated in Student Support Services, and assisted students who were in foster care or homeless through the Torero Renaissance Scholars. Upon graduation, Lopez plans to pursue a master’s degree in music therapy.

Osvaldo Miramontes

Reflecting on his time at USD, he said, “Thanks to this scholarship, I am able to work toward my goals and make both my family and community proud.”

Both students’ full speeches are available to read online under the Bridges Academy Scholarship tab at www.sandiego.edu/bridges.

Information in this publication is not intended as legal advice. Any prospective donor should seek the advice of a qualified tax or legal professional to determine the consequences of his or her gift.

The California Life Insurance Guaranty Association does not back up payments of annuities.

For information about the Bridges Endowed Scholarship, our programs or events, or any other details presented in this newsletter, please contact the Office of Planned Giving.

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