Appreciation in Person
Students, Donors Connect at Scholarship Luncheon

Erin Lupfer ’17, who graduated from the USD School of Law with her JD in May, spoke at the University of San Diego’s Scholarship Appreciation Luncheon on March 30. She urged fellow Toreros to support their passions while also helping future Toreros. Feelings of gratitude, along with in-person connections, were in abundance throughout the forums in the Hahn University Center, packed with students who were excited to meet, share lunch and thank their donors.

The 30th annual USD Scholarship Appreciation Luncheon provided the latest reminder of the generosity of people. Those who donate to the university are from all walks of life. They donate for a multitude of reasons and they may or may not even be USD alumni.

What these donors all have in common is an understanding of the power of gifts that assist students with their educations. Thank you to our donors who generously contribute to help students on the path to fulfilling their passions and their roles in our global society.

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.

Students and donors at the 2017 Scholarship Appreciation Luncheon.

Erin Lupfer ’17 (JD)
The photos featured in this issue of This year’s well-attended Torero Named scholarships provide a tangible way for benefactors to create lasting legacies that will stand as a testament to their values and passions while providing scholarship support that will make a lasting difference for generations of Toreros year after year. Most of the nearly 400 benefactors and representatives who attended the luncheon made a decision to create a named scholarship that will change the lives of USD students for decades to come. Many donors leave the annual luncheon with feelings of joy and gratitude for being able to help educate bright and promising young students who they actually spent some time getting to know. The photos featured in this issue of the Bridges Newsletter are from this year’s luncheon. Facial expressions speak for themselves! For information about how to create your own named scholarship to support USD students, please contact John Phillips at (619) 260-4523 or jphillips@sandiego.edu.

Named Scholarships vs. Legacy Scholarships

BY JOHN A. PHILLIPS, SENIOR DIRECTOR OF PLANNED GIVING

When a high school senior with a 4.00 GPA is choosing a university, the decision often hinges on the financial aid package offered by the universities. Scholarships can be part of that package, and the more scholarship funds a university has available, the greater the financial benefit to prospective students.

At the University of San Diego, approximately 70 percent of students rely on scholarships and other sources of financial aid to cover the cost of their college education. Friends and alumni provide most of the funds available for scholarships. The Scholarship Appreciation Luncheon is a way for the university and the students to say “thank you” to the donors who contribute.

DOES A SCHOLARSHIP HAVE TO BE NAMED?

No. A person could support scholarships by giving to any number of existing funds available at USD, for example: the Alumni Endowed Scholarship Fund, the Bridges Endowed Scholarship Fund, or the Bishop Charles Biddy Endowed Scholarship Fund. Gifts of any size can be made to these and other funds. Gifts from a person’s estate are also encouraged.

HOW DOES ONE CREATE A PERMANENT SCHOLARSHIP FUND?

There are many different ways to create a permanent, named, legacy scholarship fund. The minimum amount required is $50,000. Some donors can afford to write a check. The more common way is to fund it with annual gifts over five years or through a deferred (planned) gift arrangement. Deferred arrangements include a gift through a will or living trust or perhaps by naming USD as a beneficiary of a life insurance policy, an Individual Retirement Account, or a charitable remainder trust, or a combination of different gift arrangements.

For those who believe in education and supporting the young, bright minds who will be tomorrow’s Changemakers, the Office of Planned Giving, can help you create your own named scholarship fund.

WHAT LEGACY WILL YOU LEAVE?

Have you considered a bequest to the University of San Diego? By designating a USD scholarship fund as a beneficiary in your will, living trust, or insurance policy, you enhance the lives of future Toreros and help them realize their dreams.

For more information, call the Office of Planned Giving at (619) 260-4523 or email jphillips@sandiego.edu.

Tax-Free Giving from Your IRA—Now Permanent!

• You must be at least 70 ½ to make a tax-free gift directly from your IRA.
• Your gift up to $100,000 satisfies all or part of your Minimum Required Distribution (M RD).
• You pay no tax on the amount transferred to USD. It’s a tax-free gift and will not add to your income.
• IRA gifts can pay down your pledge(s).
• You must not receive any benefits in return for the gift.

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

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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