FLORIDA MEETS THE PRESIDENT

By Cynthia Tintorri

The annual Tower Society gatherings looked a little different this year as Lehigh’s 15th president, Joseph J. Helble ’82, visited with alumni and parents in Naples and Palm Beach as part of his Meet the President tour. Nearly 150 local Lehigh alumni and spouses, many of whom are Tower Society members, attended a Feb. 6 brunch at The Ritz-Carlton in Naples and a Feb. 8 dinner at The Colony in Palm Beach.

Helble shared some of the highlights of his return to Lehigh’s campus, including seeing firsthand the vibrancy of the Lehigh community and the strength of the alumni and parent network.

“I truly believe community is one of Lehigh’s greatest strengths and every individual on campus is there because they have something to contribute—and they’re valued for that,” Helble says.

In spite of the changes Helble said have occurred since he was a student—new majors, programs, colleges and buildings—Lehigh’s core mission and values have not changed.

“That’s our commitment to a world-class residential living and learning experience,” Helble says.

The future of Lehigh, according to its new president, is one of greater interdisciplinarity. Helble has made it a priority in the next five years to increase the capacity of interdisciplinary programs like IDEAS and Computer Science and Business by 50 percent to benefit students in all of Lehigh’s undergraduate colleges.

“Programs like these are an important part of what I see as the opportunity for Lehigh to build, to stand out from the crowd,” Helble says.

Helble thanked attendees for their continuing support and commitment to Lehigh and took questions from the audience. More Meet the President opportunities are coming up in other cities. Visit alum.lu/meetthepresident to see the schedule.
Consider this: Planning under “normal” circumstances allows you to slow down and review your options. For example, taking the time to be mindful when creating an estate plan gives you the opportunity to record your values and make sure your wishes are followed. A thoughtful estate plan can also tell your story through the causes you support after your lifetime.

A well-planned estate helps you:

- **Make the most of your assets.** Meeting with qualified professionals helps you grow your wealth over the long term.
- **Protect family and loved ones.** An up-to-date estate plan keeps loved ones safe. Reviewing it regularly means adjusting for changes in personal relationships, tax laws, births, deaths and state of residence.
- **Be tax smart.** Certain assets can be tax burdens (or at least tax surprises) to your family. Planning helps you keep them in the loop and possibly avoid a tax hit altogether.
- **Continue helping others after your lifetime.** Gifts to Lehigh University may provide you financial benefits in addition to the fulfillment that comes from helping our students and the school.

**WE CAN HELP**

By planning your estate now, you not only support your loved ones, you ensure the organizations you care about, like Lehigh, continue to receive your support. Contact the Office of Planned Giving at (610) 758-4749 or intower@lehigh.edu to learn more about including us in your future plans.
If you’re taking another look at your existing estate plan, or just starting your planning journey, be sure to include the following items—in addition to a will—to make things easier for you and your loved ones. In most cases, you won’t need to involve an attorney.

**Be Sure You Have:**

1. **A high-level overview** that lays out the basics of your finances and plans. Include:
   - Where to find your will and other documents, and who the key people are—your agents under the powers of attorney and executors or personal representatives.
   - Financial assets (where accounts are held and who owns them).
   - Insurance coverage (property/casualty, health, life).
   - Property and vehicle information.
   - Regular household bills that you pay.

2. **A detailed description of your finances** (account numbers, contacts at financial institutions, etc.).

3. **A personal property memorandum** that is referenced by your will and states how you want property distributed and/or sold. This allows you to assign sentimental or valuable assets to specific people without having to change your will if you change your mind.

4. **A plan for your pets** to ensure that your furry friends are taken care of. A legally binding pet trust can be created, or you can make provisions in your will for how you want your pets cared for in your absence.

5. **Your digital estate plan,** which includes online account details.

6. **Advance directives, powers of attorney and other end-of-life planning tools** to communicate your basic wishes. Add personal messages and detailed plans for your funeral, memorial and other specifics.

7. **An ethical will,** which is your opportunity to hand down your values in a document or video. Think of it as a personal record of your life—how you’ve lived it and how you want to inspire others.

**EXPLORE YOUR LEGACY AT LEHIGH UNIVERSITY**

Wherever you are in the process, your estate plan is a powerful way to show your love for your favorite causes, such as Lehigh. Please contact the Office of Planned Giving at (610) 758-4749 or intower@lehigh.edu to learn more about options available to you.
SHINE A LIGHT ON YOUR VALUES

Taking time to think about and document what’s important—and why it’s important—can help you connect more deeply with the people and places you hold dear.

For example, caring benefactors of Lehigh University share a commitment to our mission of supporting students and the important initiatives at Lehigh.

Here are some ideas for how you can forge more meaningful connections and pass along your generous spirit.

1. Have you done an activity recently that made you happy? Consider a cause related to that activity. For example, if you enjoy a particular hiking trail, find a local conservation group to support.

2. If you feel connected to a current event, see if nonprofits you support are responding and ensure they are set up for success.

3. Go beyond dollars and cents. Volunteering is a great way to give back, especially for local charities that may not have the administrative staff that their larger counterparts have. Also, inviting friends and family can be an effective way to introduce them to your passions.

4. Your values can unlock others’ generosity. Letting loved ones know what you care about can help you connect. It could even bring them to support the causes you cherish.

Tell your story by keeping a running document (a generosity journal or ethical will) that gives an account of who you gave to, why you gave to that nonprofit, how it made you feel and how that nonprofit’s mission fits into your overall value system.

To learn more about ways a gift in your estate plan can make an impact for our students and the school, contact us.

STEP-BY-STEP PLANNING

Having a solid plan is the best way to help you and your loved ones rest easy about the future. Creating your estate plan also gives you a chance to consider your long-term plans for Lehigh University. Our FREE guide Your Personal Planning Road Map lays out the process in a simple, step-by-step manner. Simply complete and return the enclosed reply card to request your copy.