

As a member of the Appleby College community, you no doubt have many cherished memories of the school. While much has changed over the years, Appleby continues to distinguish itself as a leader among independent schools, locally, nationally and globally.

That's why my wife, Ruth Ann, and I chose to send our sons Andrew '84 and Michael '85 to Appleby. And we are excited that a third generation of the family, grandson Daniel '19, will graduate next year.

Appleby's reputation has been shaped in large part by the generosity of our community. The school's roots began with Sir Edmund Walker and the gifts he left to Appleby which include the initial 32-acre farm and funding for the original School House (now Colley House) over a century ago. To honour his legacy, the school has created the **Sir Edmund Walker Society** to acknowledge and recognize the support of alumni, parents, faculty, employees and friends who have arranged to support the school through planned legacy gifts. Over the years I developed a great interest in the investment management needs of foundations and endowments and this led me to the Canadian Association of Gift Planners (CAGP).

My professional background is in investment research, portfolio management and related business development.

I have been a member of the executive of the Association's Toronto Round Table for 25 years. Being a member of the CAGP has reinforced my belief that legacy giving will help build a strong foundation of sustainable support to meet the current and anticipated needs of organizations such as Appleby.

Planned or legacy type gifts have features that are worth reviewing. They originate with individuals drafting their will and making a provision that a certain percentage of the estate is to be a charitable gift.

In a very simple example let us use 3%. If the estate, after all expenses, is \$2,000,000 the gift amount would be \$60,000; that is a major gift! The total cost of making the provision is virtually nil as it was a part of developing the will. In addition, there will be tax savings related to the gift amount.

I encourage you to consider a legacy gift. With your help, the school will remain a leader among independent schools and this will ensure future generations get the benefit of the Appleby experience.

Yours truly,

A handwritten signature in black ink that reads "Winsor Pepall". The signature is written in a cursive style with a large initial 'W'.

Winsor Pepall '54

P.S. If you wish to speak with someone about leaving Appleby College in your estate plans, please feel free to contact Trevor Nash, Manager Annual and Leadership Giving by phone at 905-845-4681 ext. 176, or by e-mail at tnash@appleby.on.ca.

P.P.S. If you have already made a charitable bequest in your will or living trust to benefit Appleby College, please let Trevor know as Appleby College would like to thank and recognize you for creating an important legacy for our school.