

# MAKING YOUR DOLLARS MAKE SENSE

WHERE THERE'S A WILL THERE'S A WAY



BY MARY MCNALLY

BEFORE THERE WAS SUCH A THING as women's athletics programs or Title IX, Evelyn Pellaton championed women in sports, first as a P.E. teacher at Cal Poly and ultimately as the director of women's athletics.

Now retired, Pellaton continues to support student athletics programs. After a recent change to her will, that support will continue into perpetuity.

When she started here in the 1960s, women's teams didn't have official games or league competition; they just had "play dates." She had virtually no budget for her programs and little support, but she never let that interfere with the chance to participate. When the ladies needed uniforms to play in a national tournament, Pellaton repurposed men's track suits from the prior year and took her team to Oregon.

Women's sports enjoy much greater support at Cal Poly these days, which only serves to fuel Pellaton's enthusiasm. Recently, she turned to Cal Poly alum and estate planning attorney John Ronca (**B.S. Business Administration, 1975**) to update her will, pledging part of her estate to an endowment that will benefit the field that defined her career.

Ronca said being an estate planning attorney is satisfying because he can help his clients in obvious ways: avoiding court, minimizing taxes and helping people take care of their families. But there are more subtle ways, as well, he said.

"Many of my clients are the history of Cal Poly," he said. "They've done so much, but they're so modest and they're not going to be around forever. If you don't ask them about their story, you'll miss it.

"I've also seen the process create relationships that help donors renew their involvement with the campus," Ronca added.

When considering her options, Pellaton kept asking herself, "What can I do?" Ultimately, she worked with Cal Poly's Planned Giving Office to develop an agreement that stipulated

her bequest would be used to support student scholars.

While Pellaton is quite cheerful about the obstacles she overcame, and the personal and professional experiences that ensued, she hopes her gift will mean that others don't have to face the same hurdles. With this provision in her will, she's giving something back and paying it forward.

## IF YOU ARE CONSIDERING A CHARITABLE BEQUEST LIKE PELLATON'S, HERE ARE A FEW THINGS TO CONSIDER:

- *Working with the Planned Giving Office helps the university develop guidelines for how your gift will be used.*
- *It can also help you incorporate provisions that allow for changes in university programs. For instance, after the Home Economics major was absorbed by another department, it took the courts several years to determine an acceptable substitute for bequests made to that major.*
- *Some people leave a percentage of their estate to charity, rather than a fixed dollar amount. "That provides an element of protection if the estate increases or decreases in value," Ronca said. After that, he said, "You can basically forget about it."*
- *An endowment may be established in which the principle must remain intact into perpetuity or for a defined period of time.*
- *If your situation or interests change, you can change your will at any time during your lifetime.*

For additional information about charitable bequests or other planned giving to Cal Poly, contact the Planned Giving office at 800-549-2666 or visit [www.giving.calpoly.edu/plannedgiving](http://www.giving.calpoly.edu/plannedgiving).