

SFU

# ENGAGE



# ENGAGE

## SUMMER 2025

### FRONT COVER

A student enjoys the sunshine while studying in the AQ Gardens during the summer of 1978—a common sight in the warmer months given the peacefulness of the outdoors and surrounding nature. Photo credit: SFU Archives [IMC-78053-011]

## MESSAGE FROM THE VICE-PRESIDENT, ADVANCEMENT & ALUMNI ENGAGEMENT



In British Columbia and across our vast world, we are living through interesting times. Now, as always, I am deeply impressed and heartened by the SFU community’s innovation, resilience, and dedication in response to the varied challenges people and our planet are facing.

I am also grateful to you, our partners, for your continued support as we work together to build the inclusive and sustainable future we all want to see.

As SFU prepares to mark its 60th anniversary this fall, we are changing the world from B.C. with novel answers to far-reaching problems. Researchers are collaborating across disciplines and with other experts in Canada and abroad to help grow our collective impact. We are also creating opportunities for students to play a role in making meaningful change.

In this issue of *Engage*, we introduce you to **Alison Shaw**, the inaugural Executive Director for SFU Climate Innovation who is helping to drive one of SFU’s key research priorities. By addressing the global climate emergency at the local level, the Climate Innovation team is ensuring neighbourhoods and communities can make informed decisions and adapt to drought, fire, floods, landslides, and other significant threats.

We celebrate a number of SFU students reaching their potential with generous donor support: **Lindsay Begemann and Christian Carson**, graduate students with the **Aquatic Research Cooperative (ARC) Institute**, who are engaging and working with communities to help conserve B.C.’s ecosystems; **Tori Meklensek**, an exceptional student and varsity athlete, who is leading by example inside the swimming lanes and in life; and **Evan Accettola**, a new alumnus soon to begin graduate studies, who never gave up on his dream of an SFU education.

Discover how Mechatronics Systems Engineering professor **Bruce Fingarson** and his partner **Edith** are breaking barriers for women in STEM. You will also get to know **Jim Felter** and his late wife, **Iris Garland**, two of SFU’s most dynamic artistic trailblazers whose remarkable legacy is invigorating learning and the arts for generations.

Thank you for your support in building the SFU that our province—and our world—needs.

A handwritten signature in black ink, appearing to read 'Erin Morantz'.

Erin Morantz  
Vice-President, Advancement & Alumni Engagement



**SFU** SIMON FRASER  
UNIVERSITY

# YOUR GENEROSITY AT WORK

“I feel a deep commitment to changing the world and Canada’s healthcare system. With your help, I can realize these dreams.

I took one year off to take care of my mom, who died during my second year. After her death, I was left alone with no support or family nearby. Still, I went back to school the following semester and maintained excellent grades.

The generosity of donors like you has genuinely allowed me to continue my

education without the extreme stress of thinking about how I will support myself.

I will never forget this generosity; it has truly helped me in a time of great need.

I fully expect myself to make a tremendous impact in this world, using education as my tool. When I am in a financially capable position, I hope to invest in the future of other students too.”

– Jeannine Ho, Faculty of Health Sciences



Help SFU students like Jeannine realize their dreams today.

[bit.ly/SFUSpring25](https://bit.ly/SFUSpring25) / [annual\\_giving@sfu.ca](mailto:annual_giving@sfu.ca) / 778-782-7250

# ENGAGE

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## WITH GRATITUDE

Simon Fraser University respectfully acknowledges the xʷməθkʷəy̓əm (Musqueam), Skwxwú7mesh Úxwumixw (Squamish), səliłwətaɁ (Tsleil-Waututh), qíćəy̓ (Katzie), kwikwəłəm (Kwikwetlem), Qayqayt, Kwantlen, Semiahmoo and Tsawwassen peoples on whose unceded traditional territories our three campuses reside.



# MEET ALISON SHAW

**Executive Director, SFU Climate Innovation**

Alison Shaw became the inaugural executive director for SFU Climate Innovation in May 2023, with a mandate to drive SFU's critical research priority of community-centred climate innovation. Her experience ranges from climate action at global to local scales, such as being the first authorized researcher of the highly influential United Nation's Intergovernmental Panel on Climate Change Third Assessment Report process in 2001, and leading accelerated climate action research with local government partners across Canada.

Referring to herself as a “pracademic”—a practitioner and academic who connects theoretical knowledge with real-world practice—Alison was an entrepreneur for 15 years running her own consulting practice before returning to academia to lead SFU's ACT – Action on Climate Team in 2021.

Learn more about Alison's commitment to bridging the gap between research and community impact to co-create solutions that help protect both people and the planet.

## What do you enjoy the most about being part of the SFU community?

I am motivated by the research community at SFU and the strong innovation ecosystem we have. There's a real sensibility and culture among researchers, staff, and students oriented toward building partnerships and producing research to solve real-world challenges. I feel privileged to work with an incredibly collaborative community of climate-related researchers, including world-leading hydrogen scientists, Indigenous scholars, climate hazards modelers, and researchers across planetary health, policy, business, economics, and equity, as well as leading communications and knowledge mobilization experts. The culture is ripe for co-designing research that crosses a diverse range of disciplines and sectors.

## Can you tell us more about the work you and your colleagues are doing in climate action and innovation research?

Our mantra at SFU Climate Innovation is to “think globally, act locally.” While climate change is a global issue, its effects and the resources available to adapt need to be addressed at the local level. While some communities will be pressed to adapt to drought and fire, others will be combatting floods and landslides. Some will have access to local renewable energy sources, and others will not. By connecting researchers with communities, we can truly work together to find different paths to a brighter future.

For instance, the joint Civic Innovation Lab combines the expertise and resources of SFU and the City of

Burnaby. Working together, our Clean Hydrogen Hub is making great strides to advance the transition to green hydrogen and clean energy. We're also collaborating on the Sustainable Community-Resilient Alternative Mobility project to redefine how we think about community transportation. To do that, we brought in a group of researchers across various disciplines to partner with the city, TransLink, Mobi Bike Share, and Evo Car Share to better understand how to get people out of their cars and into using diverse mobility options in their neighbourhoods. These are two of many local, national, and international projects we have underway that are piloting novel and potentially transformative research. Our goal is to take these findings out of academic publications and into communities everywhere.

## From your perspective, what impact can donors have by investing in climate action and innovation research?

By investing in SFU Climate Innovation, you are helping to shape a low carbon future by accelerating solutions that are resilient, scalable, and equitable. This includes being able to offer seed funds for faculty and students to co-create high-impact research with Indigenous and community partners, and advance climate innovation ranging from integrated and equitable energy transitions, to multi-hazard risk assessment and community resilience. Of course, investing in students and enabling them to engage across disciplines and sectors is vital for experiential learning, making a difference for upcoming professionals in both researcher and practice roles. The very real potential of this work is the reason I stepped out of the private sector and back into academia.

## What do you consider to be your greatest achievement?

One of my most memorable achievements was an initiative I worked on with Deborah Harford, co-founder of SFU's ACT – Action on Climate Team, in 2018. Together we piloted low carbon resilience approaches in nine B.C. local governments and one First Nation, embedding climate risks, emissions, equity, and other sustainability priorities into policy, planning, and strategy development. At the end, we were able to show how decision criteria for things like climate risks and emissions can streamline work and lead to more coherent and cost-effective decisions. The results

were shared as resources and tools, and distributed across professional practice networks, funders, and governmental agencies. Currently, low carbon resilience approaches are being advanced in communities and organizations nationally and internationally.

That said, I would have to say my greatest achievement and greatest hope is mentoring the next generation of leaders—including my own fabulous son—who are now part of legions of young people interested in stepping into uncertainty to advance toward a more sustainable future.

## Who would you say inspires you the most, and why?

I'm inspired by systems-thinkers who recognize the interdependence between communities and ecosystems. I was raised in a small town by the Columbia River, and my family's small black and white television only had one channel, CBC. I always tuned in on Wednesday nights for *The Nature of Things*. Whether he knows it or not, David Suzuki has been a very important inspiration to me, and plays a role in why I've pursued this career, along with other Canadian climate action leaders like Dr. John Robinson. I admire people who are motivated by the challenge of this lifetime: being a good ancestor. This means proactively rolling up our sleeves today and changing norms, practices and worldviews—to do what it takes to ensure our children and future generations inherit a livable, regenerative, and sustainable world. **E**

"My greatest achievement and greatest hope is mentoring the next generation of leaders."

Alison Shaw





# PROTECTING CANADA'S AQUATIC ECOSYSTEMS



Canada is a land of water, with more lakes, coastline, and wetlands than any other country in the world. Yet over the past several decades, North America's wild Pacific salmon and steelhead populations have experienced record low returns due to a warming ocean, decades of habitat destruction, overharvesting, and the impacts of fish farming.

Since 1998, SFU's Aquatic Research Cooperative (ARC) Institute—formerly the Cooperative Resource Management Institute—has been engaged in the recovery of salmon and other at-risk aquatic species. Through the thoughtful support of Canadian philanthropists committed to the conservation of Canada's environment, the ARC Institute is fulfilling one of its key mandates to train the next generation of applied aquatic ecosystem scientists, environmental managers, and policymakers to lead through research, innovation, and collaboration.

## ENSURING EQUITY OF PACIFIC SALMON FISHERIES IN B.C.'S CENTRAL COAST

In March 2025, the ARC Institute sent Lindsay Begemann, a master's student in resource and environmental management, to Bella Coola in B.C.'s Central Coast to examine whether the closing of a fishery targeting chum salmon has allowed for local fish populations to return. The research encompasses the decline of non-targeted species like steelhead trout, sockeye salmon, and chinook salmon, which would have been caught incidentally alongside chum.

The focus of Lindsay's work, which was identified as a top priority for the federal Fisheries and Oceans Canada's Pacific Salmon Strategy Initiative, aims to restore Pacific salmon as a cornerstone of the culture, economy, and sustenance of Indigenous communities while addressing the challenges of low fish returns in the face of climate and ecological uncertainties.

During her time in Bella Coola, she met with First Nations and government partners to better understand the pressures of fishery closures on their communities, and explore what an economically viable, sustainable, and equitable fishery in this region could look like.

"My research is deeply place-based, so this trip was invaluable in grounding my project in community priorities and hearing from the locals directly affected by fisheries decisions," says Lindsay. "Supporting this work ensures that our research is relevant to those most impacted by management decisions."

## UNDERSTANDING THE IMPACTS OF HUMAN-CAUSED PRESSURES ON OUR ECOSYSTEMS

Headwaters, which are the small streams and channels that form the beginning and highest end of a watershed, are rarely protected from forest harvest in B.C. Yet previous research has shown that removing trees right to the bank of these small streams—leaving limited to no shade covering the water's surface—can significantly warm downstream water temperatures and harm temperature-sensitive aquatic species like Pacific salmon that live there.

Under current regulations, nearly half of B.C. headwaters are harvested right to the water's edge. Christian Carson, also a master's student in resource and environmental management, is gathering data that highlights the importance of these areas of watersheds, especially in Interior B.C. where communities are already experiencing the impacts of increased drought and elevated temperatures due to a changing climate.

Christian says that making policy changes to human stressors within our control, like forest harvest, can lead to positive outcomes for aquatic species such as young chinook and coho salmon that depend on these habitats.

New and more holistic planning projects that consider the whole watersheds from headwater streams to the lower most reaches at the river mouths, including the North Thompson watershed where Christian conducted his research, are now being piloted across B.C.

"My research findings could significantly impact the management of headwaters in the North Thompson by influencing how and where headwaters are protected, and thereby safeguarding aquatic species downstream of these areas," says Christian. "These considerations will advance forest management in a way that supports species and ecosystem values and benefits communities."

## DELIVERING WORLD-CLASS EDUCATION AND REAL-WORLD EXPERIENCE

Thanks to generous donor support, the ARC Institute is empowered to provide enriching learning and field work experiences to our future leaders in conservation efforts and policy.

Both Lindsay and Christian credit their incredible SFU professors and supervisors for the knowledge, guidance, and connections that they bring, including their advice on how to ground research in local issues and scale them up to inform scientific research, leading to real-world conservation measures that protect our planet.

"We are grateful to donors of the ARC Institute who care just as much as we do about preserving Canada's environment," says Jonathan Moore, director of the ARC Institute and the Liber Ero Chair of Coastal Science and Management. "Because of their support, we can train and develop researchers to generate actionable science that will make a positive impact across B.C.'s ecosystems and communities." **E**

Images on p. 6 by Fernando Lessa; image on p. 7 (left) by Jonathan Moore





# RED LEAFS SWIM STAR PROPELLED BY DONOR SUPPORT

Tori Meklensek is taking SFU's varsity swimming program to historic new heights. The team captain for SFU Women's Swimming and fourth-year psychology major has surpassed both women's and men's records at the university and finished the past season with multiple podium placements. With 16 All-American trophies and numerous titles—including Rocky Mountain Athletic Conference (RMAC) Swimmer of the Year and Swimmer of the Meet, SFU's Female Athlete of the Year, and Most Valuable Swimmer—she is one of the most decorated athletes in SFU history. Tori's leadership also earned the Red Leafs women's swim squad the SFU President's Athletic Team of the Year honour.

In addition to being supported by her parents, who are swim coaches themselves, SFU Coach Demone Tissira, and her teammates at SFU, Tori has also benefited from many donor-funded athletics awards. She has twice received the Andrew Petter and Maureen Maloney Excellence in Varsity Athletics Award and been recognized with numerous other awards for her swimming achievements.

Tori recently shared insights into what fuels her passion for swimming—and the vital role donor support plays in her journey.



## What is your biggest motivation as a dedicated swimmer and team captain?

Being a part of the team is my biggest motivation. It's different from club swimming because I'm not just swimming for myself; I'm swimming for my teammates, my coaches, and for the legacy of SFU Women's Swimming. There is something really powerful about representing something larger than myself. It helps me get out of bed on cold mornings and smile—most of the time!—at the pool.

## Was there a pivotal moment in your swimming journey at SFU?

Joining the RMAC Conference in my third year. It was my first conference championship and reignited my love of swimming. The camaraderie I experienced during both RMAC and NCAA championships really changed my perspective. Swimming became about more than what is on the scoreboard—it's about the people, even those not on my team.

## How have donor-funded awards played a role in your achievements?

Being a varsity athlete takes a lot, physically, mentally, and financially. Balancing it all isn't always easy! While I've learned to be intentional with my time and lean on my teammates, these awards lift some of that pressure. They give me the ability to focus on training, recovery, and my academic performance.

Awards are also an important reminder that someone out there believes in me and the team. They recognize our daily hard work, helping us stay competitive and reminding us that we have a place in SFU's legacy.

## What message would you like to share with donors who support athletics awards at SFU?

Thank you for your generosity! Your support means more than you might realize. Not only are you funding sports, you're also helping us build our futures and inspiring us to get in the pool and give it our best every day!

## What's next for you?

In the summer I'll be focusing on training and, in the fall, starting the last year of coursework for my psychology degree. Long term, I am thinking about pursuing a career in midwifery—I think it would be incredible to provide maternal care and participate in bringing new life into the world. **E**





SFU MSE professor Carolyn Sparrey with student Amadea de Wit.

# CREATING SPACE FOR WOMEN TO THRIVE IN STEM

In today's era of rapid technological change, tech leaders are in high demand. While research shows that diverse teams are innovative and high performing, and the products they design can effectively serve broader audiences, the industry remains male-dominated.

Over the last decade, Canada has made progress attracting more women into STEM (science, technology, engineering, and mathematics). But there is still significant work to be done to address underrepresentation and the barriers women pursuing STEM degrees face, like isolation, bias, and limited financial support.

That's where SFU donors like Bruce and Edith Fingarson are looking to make a difference.



Longtime advocates for higher education, Bruce and Edith (pictured above) recently established an endowment to support women in the School of Mechatronic Systems Engineering (MSE) at SFU. Their gift will fund a new award and bursary, helping women pursue their goals with confidence. They also plan to top up the endowment through a future gift in their will, ensuring their impact continues for generations to come.

Bruce points to his inspiring female role models—his mother was a pharmacist, his aunt studied at SFU, and his grandmother was President of the Provincial Council of Women—and notes that he had parents who established awards at other post-secondary institutions. Their decision to support women in engineering at SFU feels like a continuation of their family values.

Bruce's decades-long engineering career and experiences as an associate professor of practice in MSE also influenced the Fingarsons' focus.

"I've worked with some brilliant women who brought fresh perspectives and asked questions that others didn't think to ask.

That kind of diversity is essential to innovation," he says. "But I've also seen the other side, both in industry and higher education: talented engineers who are women facing uncalled-for discrimination, exclusion, or even being told by their families that 'engineering isn't for women.' It's heartbreaking and Edith and I wanted to do more to change the landscape."

This new award and bursary are a step toward wider impact. "One award or bursary won't solve everything," Bruce says, "but it's a start. If the person we support goes on to support someone else, that ripple effect could be profound."

## EMPOWERING THE NEXT GENERATION

Amadea de Wit, a senior student in MSE, knew early on that she belonged in STEM. Her interest was initially sparked through attending several of SFU Applied Sciences' K-12 community outreach programs when she was growing up. In Grade 5, she was inspired to pursue a career in robotics upon learning her friend's father had lost his legs in a logging accident—she became determined to study robotics and learn to build robotic prosthetic limbs.

"Carolyn Sparrey was one of the first female engineers and professors I encountered during an SFU Applied Sciences day camp. I vividly recall her showing us a tensile test device used to test muscle elasticity—although for our audience she demonstrated using gummy worms," Amadea recalls fondly.

"Through interacting with female engineers and professors at those workshops, I was able to picture myself studying engineering at SFU. Throughout my time at SFU, Dr. Sparrey has continued to be an important mentor for me: she supervised my engineering capstone project; I've worked as a research assistant in her lab; and she's supported me through challenging times in the program."

Amadea has also received donor-funded awards, which have helped her focus on her studies and mentorship work. "The financial help is huge," she says "but the encouragement is even more powerful. These awards tell you, 'We see you, we believe in you, and you belong here.'"

Today, Amadea gives back by mentoring younger female students in her program and by inspiring youth through SFU's Pathways to STEAM program. She also aspires to work at the forefront of biomedical robotics, creating rehabilitative robotic devices like prosthetics, exoskeletons, and assistive technologies that empower others.

The Fingarsons hope to support student stories like Amadea's through their gift.

As Bruce reflects, "When you leave this world, what you're left with is your impact on people. If our support helps even one young woman persist and succeed, that's everything."

*Bruce is one of many SFU faculty and staff who give philanthropically to support our community. Discover what drives others like him to give back in 'Going the extra mile' on p. 12. **E***



# GOING THE EXTRA MILE



Each year, hundreds of dedicated SFU faculty and staff members like Bruce Fingarson (p. 10) go above and beyond in their commitment to the university by also giving philanthropically. They shape the lives and learning experiences of students through their teaching, research, and service, investing both their best selves and their personal resources to ensure that young people have access to world-class education, programming, and supports to thrive.

In this past fiscal year alone, faculty and staff donors contributed \$2.8 million toward vital initiatives across SFU, with more than 3,600 gifts toward critical areas of support like student health and counselling services, food security, and scholarship and bursaries. To catch a small glimpse of the culture of philanthropy at SFU, we spoke with longtime SFU staff donors **Sue Porter** and **Kris Nordgren**, and gerontology professors **Andrew Wister** and **Barbara Mitchell**, about why they give.



**SUE PORTER**

Director, Ceremonies and Events

Sue is passionate about creating a healthier and more equitable society through education. She is focused on advancing Indigenous-centred initiatives at SFU and has generously supported the Temstl'i7 ta Sníchim Squamish Language Award through monthly giving since 2017.

## Why do you support SFU?

Having worked at SFU for over a decade, I've become more sensitive to how challenging it can be for students trying to make it through their post-secondary education in the current environment—and how expensive it is to run a world-class university! I don't think there is anyone who works at SFU who doesn't wish we could do more for our students.

## What specifically motivated you to support SFU?

The first gift I made to SFU was toward scholarships in the School for Contemporary Arts. As a theatre kid myself, this was something close to my heart. For the past few years, I've been giving regularly to support a Squamish Language Award and student health and counselling services. Reconciliation is very important

to me, and this feels like one small way I can make a difference for our amazing and talented Indigenous students.

My contributions are incrementally small, paycheck after paycheck, but the fact that I have done it regularly and for so long means that I can now proudly say that my giving total has grown to an amount that is meaningful to me and that feels like it can make an impact.

## Why do you believe it is important to support SFU? And more broadly—why support higher education in Canada?

Our universities work really hard to provide excellent education, but it's not easy. And a lot of what makes universities more welcoming and accessible to a diversity of students is made possible because of additional funds raised for bursaries, scholarships, training programs and more, from ordinary people like me. We need government to step up more, but we also need people to step up to fill in the gaps. If each of us takes responsibility for doing what we can to lift others up, we help create the country and world we want to be a part of. It's a win-win.





# KRIS NORDGREN

Assistant Registrar, Senate and Academic Services

As both an SFU graduate and staff member, and a proud parent of a current SFU student, Kris has a deeply personal connection to SFU. For more than a decade, Kris has supported alumni scholarships and bursaries, including monthly contributions toward the Indigenous and Black Graduate Scholarship in Biology.

## What specifically motivated you to support SFU?

My motivation is that there are students who need support to pursue a post-secondary degree and may not have the financial resources elsewhere to do it. Given my strong connection to the university as an alumnus, staff, and now SFU parent, I wanted to give back.

"It doesn't take much to add up to a lot."

Kris Nordgren

## What impact of your support have you seen at the university?

I work with the Senate and am the secretary to the Senate Committee on Scholarships, Awards, and Bursaries. Every year, the committee submits a report to the Senate that includes new scholarships and bursaries that have been established, and a financial accounting of how these funds have been distributed. While my contribution is a "drop in the bucket," seeing the millions of dollars that have been provided to undergraduate and graduate students makes me feel like that "drop in the bucket" is helping out.

## How would you encourage other staff and faculty to give?

I would remind my fellow SFU colleagues that it doesn't take much to add up to a lot—there are a few thousand staff and faculty, so that's a lot of "drops" to fill up the bucket. But we are living in challenging and uncertain times—with the SFU budget taking a big hit and the Canadian economy impacted by significant political changes—so I understand that it may be a challenge for some.



# BARBARA MITCHELL

Professor of Gerontology and Sociology

# ANDREW WISTER

Director, Gerontology Research Centre  
Distinguished SFU Professor

Andrew Wister and Barbara Mitchell are dedicated members of the SFU community, as both esteemed faculty members and long-standing donors. Their philanthropic impact spans across multiple areas of support and, in 2020, they established the Wister-Mitchell Graduate Scholarship in Gerontology Endowment to ensure that graduate students passionate about aging-related research have the resources to thrive.

## Why do you support SFU?

We hold a deep appreciation for the supportive and inspirational academic environment that SFU fosters. We were delighted to create the Wister-Mitchell Graduate Scholarship in Gerontology in recognition of SFU's commitment to excellence and to give back to the next generation of gerontologists.


## What specifically motivated you to support SFU?

The opportunity to provide a legacy scholarship to support graduate students who are passionate about addressing the challenging issues associated with population and individual aging was a motivating

factor for us to create this award. We had donated to other gerontology-focused scholarships and lectureships such as the Ellen Gee Memorial Lecture, who was a friend and colleague of ours, so we were aware of the range of possible opportunities to create a new student award in our name.

## Why do you believe it is important to support SFU? And more broadly—why support higher education in Canada?

There has never been a more crucial time to support SFU and higher education in Canada. This is due to the retrenchment of funding that has created the current budget crisis across Canadian post-secondary institutions.

We plan to leave a gift in our will to create the Mitchell-Wister Lectureship in Gerontology to memorialize our commitment to this field. This is our small effort to recognize SFU's long-term investment into making the Department of Gerontology and Gerontology Research Centre unique in Canada and enhancing their world-class status. We are also looking at developing a legacy gift to SFU's Department of Sociology and Anthropology. 



# HOW TO PLAN TO REDUCE TAXES ON YOUR ESTATE

Part three in a  
three-part series



**ARTICLE BY PAMELA YOON,  
SFU ALUMNUS AND RBC DOMINION  
SECURITIES SENIOR PORTFOLIO MANAGER**

By planning for tomorrow today, you can retain more of your assets, protect your estate and leave a lasting legacy (for your family and charitable organizations that you love).

In this third instalment in a three-part series, we look at some ways to minimize taxes at death. Please note these tips are intended for a Canadian resident who is not a U.S. citizen. If you have dual citizenship or residency in another country, there may be additional strategies and issues you need to consider.

## JOINT ACCOUNTS WITH BENEFICIARIES (ADULT CHILDREN)

I have seen situations where one adds their adult children as joint owners on their investment accounts to avoid probate fees. Be careful in this situation as your actions may have adverse consequences (for example, exposure to your beneficiaries’ creditors or their marriage breakdown). Probate fees in British Columbia are only 1.4% of the value of the estate. You might want to consider a Joint Gift of Beneficial Right of Survivorship (JBWRS) account instead.

## SURPLUS MONEY IN A CORPORATE INVESTMENT ACCOUNT

If you are a business owner, you may have surplus profits accumulating in your Canadian Controlled Private Corporation (CCPC). This may be in either your operating company or in a holding company. Funds left to accumulate in the corporation are generally used for business purposes or they may be left to accumulate in corporate investment accounts. The corporate wealth transfer solution involves moving corporate investment dollars from a tax-exposed environment to a tax-deferred one. By doing so businesses can minimize taxation on investment growth and business owners can maximize the amount that is available for estate purposes (less tax, more left in the estate, growth is tax-exempt).

## GIFT ASSETS

Gifts of assets to your children or grandchildren during your lifetime is a simple strategy that may help reduce the size of your estate and therefore possibly reduce probate and taxes on these assets during your lifetime and on death. For tax purposes, it’s important to recognize that when you gift assets, you’re deemed to have disposed of those assets at fair market value (FMV). Further, if you make gifts to minors, be careful of the attribution rules, which could result in the income earned on the gifts attributing back to you and being taxed in your hands.

## U.S. ESTATE TAX

If you own any U.S. situs assets (for example, a property in Palm Springs or a portfolio of U.S. stocks), it’s important to examine your potential U.S. estate tax exposure. You may be subject to U.S. estate tax even if you’re not a U.S. citizen.

## CHARITABLE DONATIONS

If you have philanthropic intentions, you may want to consider gifting directly to a qualified donee. Qualified donees may be charitable organizations, public foundations, or private foundations. Typically, a registered charity is a qualified donee. You will receive a charitable donation receipt which may reduce your tax bill. Donations can be made while alive or after you are gone (via your estate).

As a proud alumnus, I donate to SFU annually via the Pamela Yoon Award in Economics that supports SFU students wishing to go into the field of finance post-graduation, with a special emphasis on the Chartered Market Technician or the Chartered Financial Analyst program. My philanthropy is intentional and is built into my financial plan. **E**

*Before taking any action on any of the strategies discussed in this article, make sure you get qualified professional advice. To learn more, get in touch with Pamela Yoon at [pamela.yoon@rbc.com](mailto:pamela.yoon@rbc.com)*

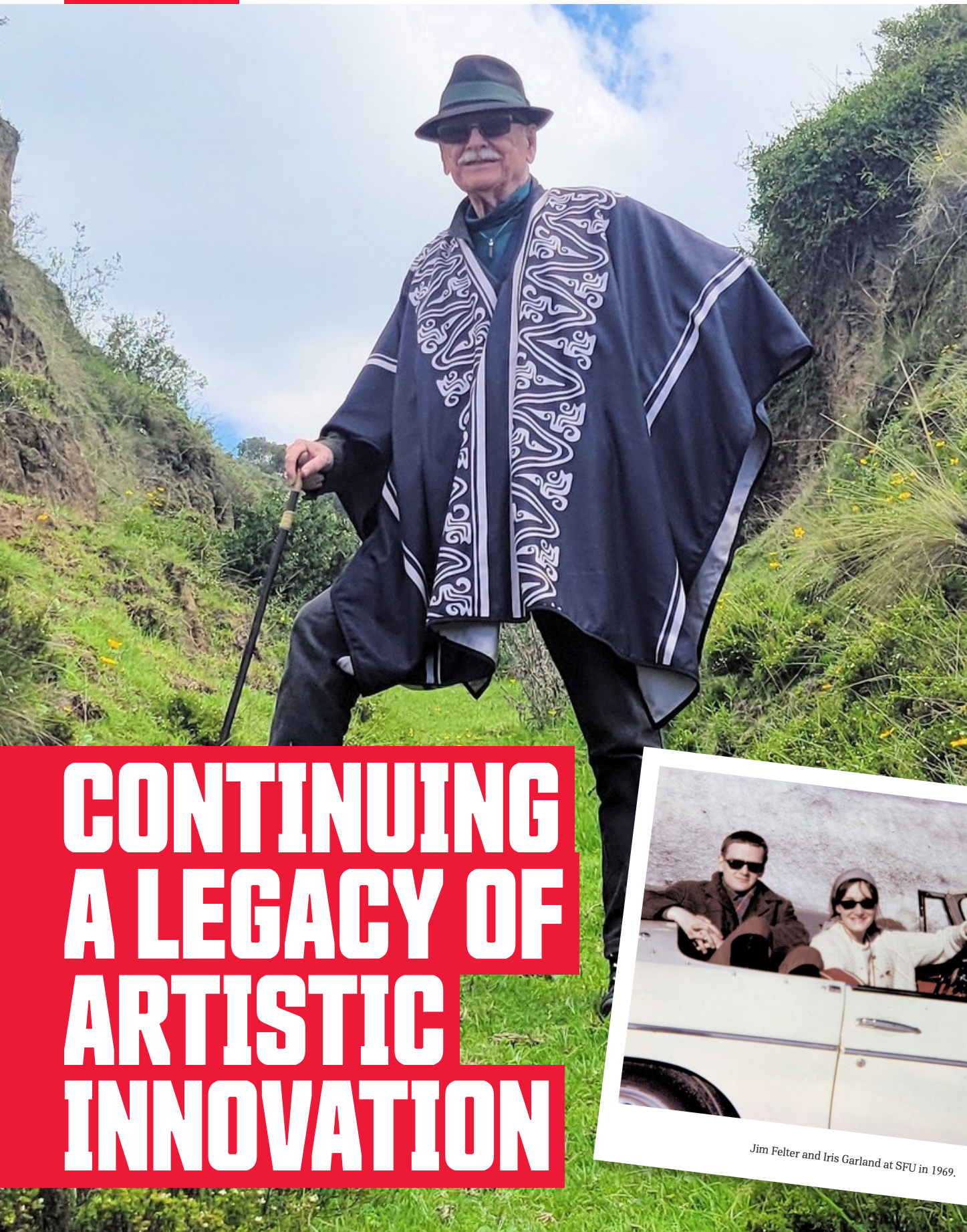
*Want even more tips on giving strategically? RBC Dominion Securities has a 28-page document on charitable giving.*

**Disclaimer:**  
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# CONTINUING A LEGACY OF ARTISTIC INNOVATION



Jim Felter and Iris Garland at SFU in 1969.

Jim Felter and the late Iris Garland were trailblazers in SFU’s vibrant artistic history, inspiring generations of students, artists, and the public alike through their creativity, dedication, and vision.

During his 16-year stint at SFU, Jim taught visual communication, established the SFU Art Gallery, and managed the growth and use of the university’s art collection as the founding curator and director on Burnaby campus. Iris, a charter faculty member, co-created western Canada’s first for-credit university dance program, choreographed numerous productions, taught and mentored countless students, and was a determined advocate for contemporary dance throughout the country.

"If you can have an impact on other people in a positive way, then you should go for it."

Jim Felter

Today, their legacy is strong and continues to make a remarkable difference on learning and the arts through their philanthropic commitment to SFU.

“You’re only here for a short time,” reflects Jim. “If you can have an impact on other people in a positive way, then you should go for it.” With no children and a shared love of the arts, Jim notes he and Iris were mindful of what they would leave for future generations.

During lengthy discussions about their legacy before Iris passed away in 2002, they decided together to support SFU’s dance program at the School for the Contemporary Arts (SCA). In her memory, Jim established a fund supporting guest choreographers and providing travel stipends for SCA dance faculty to attend dance conferences and present papers.

“Both of us had experience with visiting artists during our own university days and it really had an impact on our development,” Jim recalls. Having guest artists was “a breath of fresh air,” he says, and it inspired new ideas for students as well as other faculty members.

Jim left SFU in 1985 and has continued to pursue activities in the visual arts ever since. He also gives generously to SFU Archives and has chosen to leave a bequest gift in his will to the university, a part of which will also support SFU Galleries, helping to steward an art collection that has grown to include more than 5,600 works of art.

As curator during the collection’s inception, Jim purposefully aimed for diversity.

“I brought into public galleries a collective, broad-spectrum view of what art is because I wanted to expose students to everything I could think of,” he says, adding that he felt a “duty” to introduce students to the gallery experience. He also launched the permanent public installation of pieces across Burnaby campus and a loan program bringing art into department and faculty offices.

Calling his tenure at SFU “a dream job,” Jim points out that Iris sometimes faced resistance to her ideas and aims, largely because her academic background began in physical education, not dance.

“She was tough,” he says of his wife, whom he met on his first day at SFU in January 1969. “When she’d get down, I’d say ‘look, look at your life, look at our lives, you started a dance program, I started an art gallery, how many people have that kind of opportunity to start something? Very, very few.’”

As SFU prepares to open the Marianne and Edward Gibson Art Museum—a new home for SFU Galleries and the SFU Art Collection on Burnaby campus—Jim is excited for the future of the university and encourages others to consider how they too can make a difference.

“Give what you can to help ensure that those that follow you have the same opportunities you’ve had,” he says. “Your gift will change lives.” **E**

If you would like more information about making a meaningful gift in your will, please contact us at [gifttest@sfu.ca](mailto:gifttest@sfu.ca) or call 778-782-4154. We are happy to also share details about how to obtain a copy of *A Magical Time: The Early Days of the Arts at Simon Fraser University*, produced by the SFU Retirees Association in partnership with Harbour Publishing.



# CHASING A DREAM



Growing up in rural Ontario with few universities within close distance, Evan Accettola was told that he would never be able to pursue a post-secondary education.

Fast forward to 2024, which saw Evan graduate with distinction from SFU, obtaining not just his bachelor's degree in sociology but three certificates in Indigenous studies research, police studies, and social justice. His journey was made possible through the generous support of donor-funded scholarships like the Coast Capital Rudy Nielsen Award, for which Evan was the inaugural recipient.

Despite having big dreams of attending university, he had not even seen one in person until his late teens. Evan never gave up on that dream and eventually

returned to high school in his 20s to finish his studies. He then applied as a mature student to nursing school in Toronto, making a bold move from a small town to the big city.

After an eye-opening two-week trip to B.C., where Evan briefly resided for about a year when he was younger, he fell in love with the idea of living on the West Coast and decided to make an even bolder transition to study at SFU.

"It has been a tough road for me getting to where I am, and it took some extra time," says Evan. "But the help I received through funds like the Coast Capital Rudy Nielsen Award pushed me to accomplish a dream I wasn't sure I could achieve."

The award came at an optimal time when Evan needed financial support so he could focus on excelling in his studies—an endeavour that positioned him for his next ambition of graduate school.

Since receiving his undergraduate degree, Evan has successfully completed a Faculty of Arts and Social Sciences Dean's Undergraduate Fellowship and currently serves as an Indigenous Student Ambassador at the university's Indigenous Student Centre. This September, he will be starting the master's program in sociology at SFU.

"Many students have low grades because they are struggling with paying their rent, drowning in bills, and worried about their next meal," says Evan. "The support of donors really uplifts people to perform at their highest level. That's why bursaries and awards are important, because they enable students to achieve the grades they need to qualify for merit-based scholarships that too often feel out of reach."

## BREAKING DOWN BARRIERS TO EDUCATION

Thanks to the generosity of Coast Capital and their dear friend Rudy Nielsen, the Coast Capital Rudy Nielsen Award was established at SFU in 2023 to provide support to students who have demonstrated perseverance through adversity.

"Supporting education has always been close to my heart," says Rudy. "As a young student, I was given a helping hand when I needed it most—and it changed my life. Partnering with Coast Capital to create this award at SFU lets me pay that forward and help students like Evan chase dreams they once thought was out of reach."

"Stories like Evan's are the reason why Coast Capital is working to support people in Canada to access education and skills training," says Tara Walter, manager, social purpose ecosystem at Coast Capital. "Through our sponsorship of the Rudy Nielsen Award, we are committed to expanding opportunities for students with disabilities by providing financial assistance that empowers them to thrive, reach their fullest potential, and transform their dreams into reality." ■



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