

# ROBERT MEANS THOMPSON SOCIETY 2020 ANNUAL REPORT



## LETTER FROM THE DIRECTOR



We are pleased to introduce our first annual report for the Robert Means Thompson Society. This annual report gives us an opportunity to share growth in RMTS membership,

highlight examples of how the generosity of RMTS members has an impact on the Naval Academy and share the returns of our segregated investment funds for charitable gift annuities and charitable remainder trusts under management of the U.S. Naval Academy Foundation.

Thank you for your support for the future of the Naval Academy.

*Patti Bender*

Patti Bender  
Director, Planned Giving



### ROBERT MEANS THOMPSON SOCIETY

The Robert Means Thompson Society (RMTS) is for those who care deeply about the future of the Naval Academy. RMTS recognizes individuals who have planned a gift for the future of the Academy either through an estate gift (bequest in will or trust; beneficiary designation from an IRA, life insurance policy, or other account; or other gift after lifetime) or a life income gift (charitable gift annuity, charitable remainder trust or charitable lead trust).

Membership in RMTS provides the Foundation with an opportunity to thank members for their future generosity during their lifetimes.

### NEW GIFTS RECEIVED IN 2020

9 charitable gift annuities	\$ 1,092,371
2 charitable remainder trusts	\$ 319,640
26 estate commitments	\$15,045,951
13 realized bequests	\$ 1,655,438

## INVESTMENT PERFORMANCE

Period Ending 31 December 2020				
Account	1 Year	3 Years	5 Years	10 Years
60/40 Balanced	12.42%	8.52%	9.91%	8.37%

The USNA Foundation's Planned Giving Program is designed to provide donors with a way to make a gift today, while at the same time preserving their ability to continue to earn income from their gift. The return objective of our planned giving portfolio is typically to preserve purchasing power over time as well as exceeding the predicted return rates.

## **DOROTHY BUNEVICH SUPPORTS THE ALUMNI ASSOCIATION**

Captain Irving Bunevich '34, USNR (Ret.), faithfully served his country through the Navy Reserve and active duty during World War II. Following his death in 1991, his widow Dorothy Bunevich took up the call of service by including the U.S. Naval Academy Alumni Association in her will and becoming an active member of the Robert Means Thompson Society. The year after his death, Dorothy made a gift for an Honor Chair in Alumni Hall in memory of her husband and continued giving in support of the Alumni Association in most years until her death in 2017. It was then she made her largest gift in support of the Alumni Association—a gift 66 times larger than the total of the gifts she and her husband made during their lifetimes! Dorothy's thoughtfulness and planning influenced her philanthropy, and the future of the Alumni Association. Thank you, Dorothy!

Read more Donor Stories:

### **Marv '73 and Daryl Clott**

[www.usna.planmylegacy.org/donor-stories/marv-clott](http://www.usna.planmylegacy.org/donor-stories/marv-clott)

### **Jeff Neufeld '76 and Gayle Plato**

[www.usna.planmylegacy.org/donor-stories/jeff-neufeld-and-gayle-plato](http://www.usna.planmylegacy.org/donor-stories/jeff-neufeld-and-gayle-plato)

## **RMTS AND PRESIDENT'S CIRCLE**

In today's highly competitive world, funding through private gifts is absolutely essential to the strategic advancement of a dynamic learning environment. It is crucial that federal funding be supplemented by private contributions to create a first-rate educational institution for the Brigade of Midshipmen and develop these young men and women for future success as leaders of our Navy and Marine Corps.

While RMTS members plan gifts to support the future of the Naval Academy, President's Circle donors make gifts of \$2,500 or more each year during their lifetimes to support the work of the Academy today. More than half of RMTS members also make annual gifts at the President's Circle level. To learn more about becoming a President's Circle donor, call Megan Farmer at 410-295-4188 or visit [www.usna.com/pc](http://www.usna.com/pc).

## **CONTINUE YOUR PLANNING**

The U.S. Naval Academy Alumni Association and Foundation website has a Memorial Affairs page as a resource for alumni, their families and friends. Available assistance and information includes advance planning, how to get the word out to classmates, preparing an obituary, choosing memorial tribute gifts and honoring those lost in the service of our country. Visit [www.usna.com/memorial-affairs](http://www.usna.com/memorial-affairs).

## **NEW 2020 RMTS MEMBERS**

Terrence E. Anderson '65 and Anne Anderson  
CAPT Richard E. Andrews '63, USN (Ret.) and Susan Andrews  
John S. Arnold and Kristin L. Arnold  
Michael S. Case '82 and Anne M. Wilkins  
John E. Chalker '72 and Bonnie J. Chalker  
ADM Henry G. Chiles, Jr. '60, USN (Ret.)  
VADM Daniel L. Cooper '57, USN (Ret.)  
CDR Scott S. Darling '78, USNR (Ret.) and Anne B. Reinert  
CAPT Charles B. Dixon '79 and Deborah A. Dixon  
James A. Fiorelli '78 and Jan M. Fiorelli  
Alexander Gaston  
CAPT Edward R. Hamm '67, CEC, USN (Ret.)  
LCDR Michael C. Harris '06, USN  
David L. Hoagland '73  
CAPT Steven R. Ingram '73, USN (Ret.) and Linda G. Ingram  
CDR James P. Kelly '66, USN (Ret.) and Beverlee B. Kelly  
LCDR John A. Kendall '64, USNR  
LtCol Stephen T. Linder '69, USMCR (Ret.)  
CAPT C. Max Lindner III '73, USN (Ret.)  
Edmund L. Mangan '60 and Suzanne Mangan  
David E. McKie '66  
James A. Morrison, Jr. '52  
Jeffrey A. Neufeld '76 and Gayle Plato  
CDR David B. O'Neill '74, USN (Ret.) and Mary O'Neill  
David Ornstein '92  
CAPT James A. Petersen '76, USNR (Ret.) and Louise A. Petersen  
Edward P. Riehl '76 and Sarah D. Riehl  
CAPT Ernest J. Roeske '76, USN and CAPT Tomi Roeske, USNR (Ret.)  
CDR Jerry A. Rudd '74, USN  
Michael R. Salewske '69  
CDR Mark E. Sanders '89, USN (Ret.)  
Mr. Truman T. Semans  
CAPT William L. Sheppard, Jr. '72 and Ebru Sheppard  
CDR Richard V. Snow '85, USN (Ret.) and Lori Snow  
CAPT Steven A. Swift '87, USNR (Ret.) and Kris E. Swift  
Dr. Mark Sylvester  
Michael W. Taylor '86 and Lynne C. Taylor  
J. Ronald Terwilliger '63  
Thomas R. Tritz '73 and Barbara K. Tritz  
CDR Timothy R. Warren '75, USNR (Ret.) and CDR Sherry D. Neff, USNR (Ret.)

## **OFFICE OF PLANNED GIVING U.S. NAVAL ACADEMY FOUNDATION**

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