

# corridor

Spring 2022



From the  
MIT Office  
of Gift  
Planning

# Sharing the Gift of Music at MIT

## A bequest from the estate of Stephen Erdely



**In 2021, MIT was honored to receive a bequest from the estate of Stephen Erdely (1921–2017), a distinguished musician, scholar, and member of the MIT music faculty. The gift includes a significant contribution to the new MIT Music Building, Erdely’s scholarly papers, a violin, and four rare violin bows.**

“Professor Erdely’s estate gifts reflect his breadth of inquiry, generosity of spirit, and support for our future,” says Marcus Thompson, Institute Professor of Music in the School of Arts, Humanities, and Social Sciences.

### **A life of accomplishments, and renewal.**

Born in 1921 in Hungary, Erdely attended the Franz Liszt Academy of Music in Budapest, where he studied with Béla Bartók, Zoltán Kodály, Leó Weiner, and Ede Zathureczky. After surviving World War II and the horrors of the Dachau concentration camp, Erdely performed with the Munich Chamber Music Society before immigrating to the United States, where he spent many years as a violinist with the Cleveland Orchestra under conductor George Szell. Inspired by Hungarian folk music and its influence on composers like Bartók, Erdely completed a PhD, becoming one of the first leading scholars in ethnomusicology. In 1973, he joined the MIT faculty.

“Professor Erdely was the first ethnomusicologist on our teaching staff who expanded our musical offerings beyond the Western canon, and the first professionally trained violinist on our faculty,” says Thompson.

Erdely’s companion in music and life was his wife, acclaimed pianist Beatrice (Epstein) Erdely (1922–2012). The Erdelys performed together for over 50 years and shared passions for music, art, and culture. Sheryl Cohen, a close friend and cotrustee of the Stephen Erdely Trust, describes them as “Renaissance people” whose mentorship shaped many lives. “I met them in 1967 when I began my first job as principal flutist in the Toledo Symphony, and they took me under their wing,” she says. Her cotrustee, Joshua Klein, a Bay Area attorney, met the Erdelys as a student and mentee and became a lifelong friend.

“Steve was very proud of the role that music and the humanities played at MIT,” says Klein. “His students came to MIT for the extraordinary science and engineering education, but the arts and humanities were important parts of their education, too, and he relished that.”

As trustees, Klein and Cohen were charged with selecting charitable beneficiaries for the estate. Cohen explains that the Music Building was the perfect way “to honor his legacy and benefit the institution he loved.”

The bequest has a number of components: a naming contribution to faculty offices, one in the Music & Culture Pavilion and a suite of three in the Music Maker Pavilion; Erdely’s scholarly papers, which will be available to future scholars in ethnomusicology; a violin; and four violin bows, each several hundred years old, from storied instrument makers.

“Bows like these are not the resource of one person,” says Klein, “but gifts to be shared. We are so happy that MIT can care for them and make them available to students, faculty, and other performers.”

### **A growing legacy.**

Erdely’s influence is still evident in the Institute’s music education, says Thompson. Many student-musicians now come to the Institute to take advantage of the rigorous, conservatory-level training on offer alongside MIT’s wealth of other learning and experiential opportunities—a testament to Erdely’s commitment to the music program.

“Erdely’s presence, vision, and legacy are reflected in our expanding private teaching program; ear-training laboratory; faculty appointments and research in the music of India, Bali, and Senegal; and in the recent appointment of an assistant professor of violin, Natalie Lin Douglas, who is also a distinguished performer of new and under-recognized music,” says Thompson.

For Klein and Cohen, completing this bequest is an honor. “It’s tremendously satisfying,” says Klein, “to know that our friend is contributing to a cause he was so deeply attached to: the musical education of students at MIT.” ●

To learn more about bequests, visit [giving.mit.edu/bequests](https://giving.mit.edu/bequests).

COVER:  
Natalie Lin Douglas,  
assistant professor  
of music, with the  
Erdely violin

# Fostering Creative Collaboration, Celebrating a Legacy

## Yupo '67, SM '69, PhD '72 and Susan Chan



Professor Yupo Chan came to MIT from his native Hong Kong and completed his bachelor's in civil engineering, his master's in transportation systems, and his PhD in operations research at the Institute. Throughout his successful career in operations research and communications—a fast-growing branch of systems engineering—he remained grateful for the education, friendships, and fond memories he gained at MIT. During his lifetime, he established two gift annuities to support undergraduate scholarships.

“Yupo valued the education that he got at MIT,” says his spouse, Susan Chan, “and wanted to make that available to other people, too.”

Although Yupo passed away in February of 2020, he continues to shape MIT both through gifts made during his lifetime and an innovative new fund established by Susan in his honor in the MIT Stephen A. Schwarzman College of Computing to celebrate Yupo's memory and support the mentorship and interdisciplinary collaboration he championed.

The Chan Wui and Yunyin Retreat Fund—named in honor of Yupo's parents, who prized education—will underwrite an annual retreat for select MIT researchers, enabling participants to step away from their daily activities for in-depth discussions and dialogue and cultivating mentoring relationships between early career and senior researchers. Research topics will be diverse and include those that Yupo advanced in his work.

### An “entrepreneurial academic” who valued mentorship.

Susan describes her husband as “an entrepreneurial academic” who found joy in research and teaching as well as in music, cuisine, and travel. As a scholar and author, he explored the intersection of mobility and communications and the technological advances reshaping everything from travel and commerce to education and employment. For many years he served as professor and founding chair of systems engineering at the University of Arkansas at Little Rock. It was there that he created one of his proudest achievements—the Chan Wui and Yunyin Rising Star Workshop, similarly named for his mother and father.



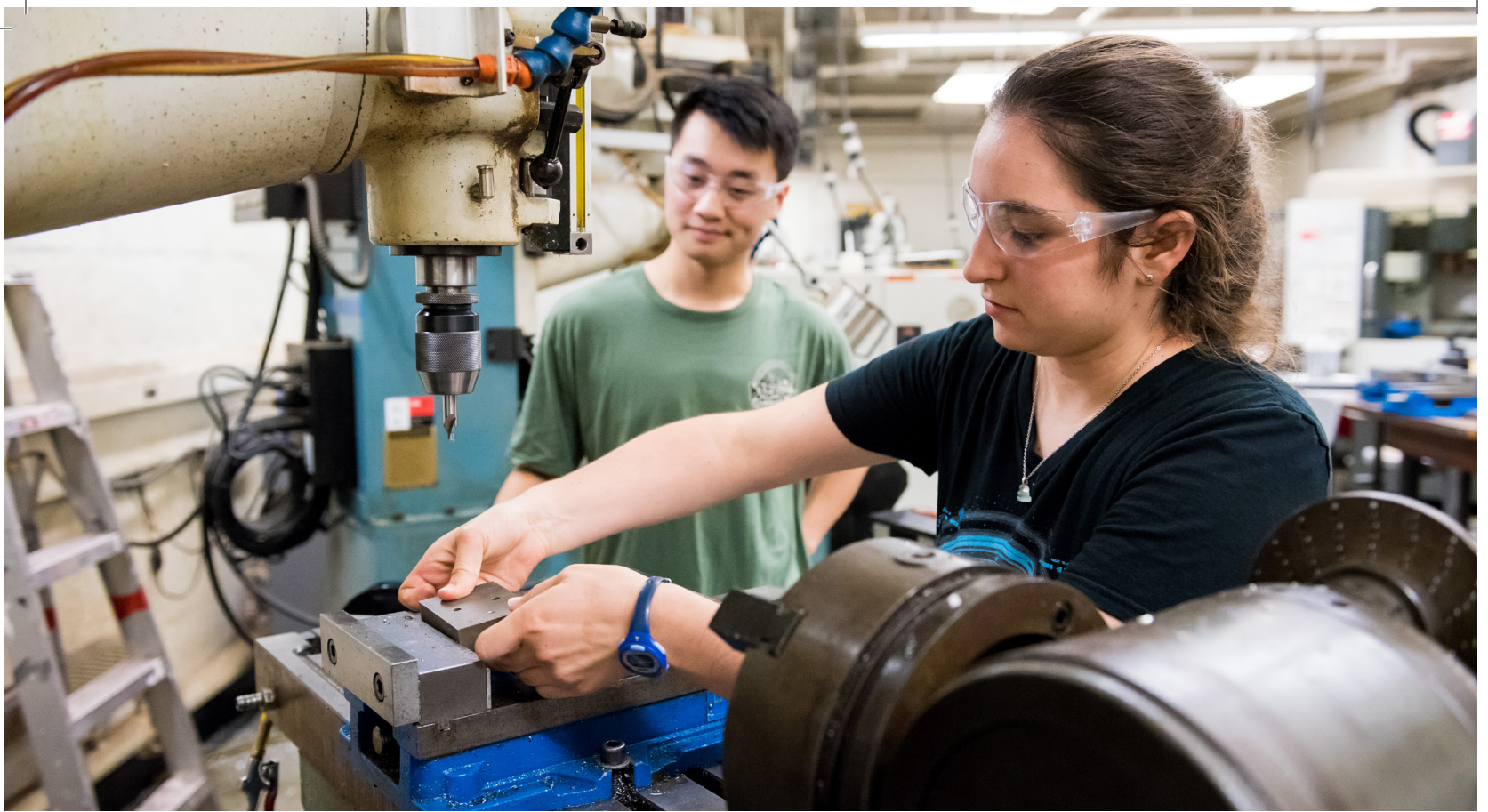
The Rising Star Workshop was created to offer early career and senior academics in his field a chance to form mentoring relationships and explore common interests in beautiful geographic settings. Like the new retreat fund at MIT, the University of Arkansas Rising Star Workshop was funded through the Chans' charitable trust, which was the result of a generous inheritance from Yupo's mother and father.

### Celebrating one life by empowering others.

The goal of the Chan Wui and Yunyin Retreat Fund is to extend Yupo Chan's generous and entrepreneurial spirit and empower MIT researchers to address complex global challenges. “This is a gift coming from Yupo, through me,” says Susan. “The fact that these retreats will be designed by and held at MIT, an institution that Yupo valued so much, made this the right gift.” ●

To learn more about charitable remainder trusts, visit [giving.mit.edu/crut](https://giving.mit.edu/crut).

RIGHT:  
The late Yupo Chan  
with his spouse, Susan



## ‘It’s All About Giving to Your Passion’

### Alan '72 and Joan Henricks



“MIT was a very humbling experience for me,” says Alan Henricks, who was the first in his Midwestern family to attend college. “But at the end of four years, it also gave me self-confidence to go forward in the world.” Alan, who went on to a successful career of leadership roles at several technology companies, and his wife, Joan, have supported a range of Institute initiatives, but their primary focus is the MIT Edgerton Center, founded in 1992 to honor the late Harold “Doc” Edgerton SM 1927, ScD 1931, inventor, entrepreneur, and MIT professor. The center is a hands-on laboratory resource for undergraduate and graduate students and also conducts educational outreach programs for K–12 students. “It combines a set of programs that we believe in deeply,” says Alan.

#### “Doc” Edgerton’s legacy.

Alan worked at several part-time jobs to make ends meet during college, but the one he liked best was conducting campus tours. The Strobe Lab, where he invariably found the “retired” Edgerton working with first-year students, was his favorite tour stop. “In my college years, everything was about computers and software,” recalls Alan, a strong believer in

MIT’s “mens et manus” ethos. “Things were much more about the mind and not the hand. But the Edgerton Center is more of a maker center; it’s combining those two. I appreciate the value of that.”

Joan Henricks, who holds a doctorate in behavioral sciences and has served as a children’s school docent at a San Francisco art museum for many years, was impressed by the center’s outreach to community schools. “I had always believed in informal learning,” she says, “but I became deeply interested in seeing this kind of learning in action.”

#### Lessons of philanthropy.

Joan and Alan have reached some meaningful conclusions in their years of philanthropy to MIT and elsewhere. “Bequests are important—and we have one in our will for MIT,” says Alan. “Giving to something while you’re alive and can experience it is also a great thing to do.” Joan adds, “It’s all about giving to your passion.”

With that in mind, the couple established the Edgerton Center Director’s Fund. “Funds that are focused on a purpose and not a person are much

ABOVE:  
Minsu Jung '21 and  
Annemarie Dapoz '22  
in the Edgerton  
Center Area 51 CNC  
Machine Shop

more likely to be leveraged,” says Alan. “It’s a discretionary fund to give the center’s director some flexibility, and we also wanted to make this a fundraising tool so that others might contribute to it.”

The couple’s goal is for the Edgerton Center to continue as a thriving entity. MIT students, says Alan, “are incredible and so enthusiastic about the center. They’re literally sending rockets to the edge of space. It’s a self-perpetuating system of achievement and accomplishment.”

Those students, the Henrickses point out, will soon be the next generation of alumni at MIT. For those who find that the Edgerton Center helped launch their careers, says Alan, “they’ll have a way to give back through this endowed fund.” ●

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Visit [edgerton.mit.edu](http://edgerton.mit.edu) for more information about the Edgerton Center. Learn about bequests at [giving.mit.edu/bequests](http://giving.mit.edu/bequests).



Alan and Joan Henricks



## Recent Happenings

### KDMS Appreciation Event September 26, 2021

Katharine Dexter McCormick (1904) Society members spanning a wide range of class years and time zones came together virtually for the annual KDMS Appreciation Event, an occasion to thank MIT donors who have made provisions in their estate plans or contributed to life-income gifts.

The program included then MIT Provost Martin A. Schmidt SM '83, PhD '88, who thanked KDMS members for their support during the recent MIT Campaign for a Better World; KDMS co-chair L. Robert Johnson '63; and Nergis Mavalvala PhD '97, dean of the MIT School of Science and the Curtis and Kathleen Marble Professor of Astrophysics, who presented on her vision for the school.

To view an event recording, visit [giving.mit.edu/kdms](http://giving.mit.edu/kdms).

### Corridor Webinar November 17, 2021



In the latest installment of the *Corridor* webinar series, Marianthe Mewkill, chief financial officer of the MIT Investment Management Company, and Brad Bedingfield, tax and estate-planning attorney at Hemenway & Barnes LLP, discussed potential changes to US tax laws and their impact on charitable giving, as well as the health of the MIT endowment.

Read a Q&A with Marianthe Mewkill at [giving.mit.edu/endowment](http://giving.mit.edu/endowment).

# Q&A: What Planning Makes Possible

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Amy Goldman, senior director of gift planning at MIT, talks to *Corridor* about the role of planned giving in the recent MIT Campaign for a Better World, how certain gift types have grown in popularity, and why it's beneficial to start early.

## **How did the Campaign for a Better World shine a spotlight on the important role planned gifts play in ensuring MIT's future?**

Throughout the MIT Campaign for a Better World, the Office of Gift Planning (OGP) worked with hundreds of donors to maximize their philanthropy, from noting the additional tax benefits of donating appreciated stock to setting up a life-income gift that would support them and/or their beneficiaries while also contributing to a long-term MIT priority. In addition, we helped people to structure estate gifts that would fortify the areas at MIT they support as active donors and volunteers. OGP also honored bequests made by those who passed during the Campaign by facilitating completion of their estate gifts, which provided support to MIT's areas of highest need—unrestricted resources, scholarships, graduate fellowships, and faculty. All of these planned gifts have the power to extend the benefits of the Campaign for decades to come.

## **What planned giving vehicle has proven popular and why?**

For the past several years, the charitable remainder unitrust has grown in popularity thanks to the many benefits such trusts provide to donors, their loved ones, and MIT. This is a gift type that fits in well with the current tax code and allows for flexibility in funding assets and structure. We also saw an increase in bequest intentions as more people worked to solidify their overall estate plans and consulted with OGP on suggested language for their wills and trusts to accomplish their goals.

## **How have you seen planned gifts deepen the relationship between MIT and its donors?**

When a donor sets up a planned gift to benefit MIT, that donor establishes a lifelong relationship with



the Institute. Planned giving donors are welcomed into the Katharine Dexter McCormick (1904) Society (KDMS), updated annually about how their gift is performing, and assigned a contact to help answer questions or identify areas of interest. They become part of a collective that has long helped to sustain and strengthen MIT.

## **Why is it important for donors to start thinking about their estate plans as early as they can?**

In addition to providing the comfort of knowing one's affairs are in good order, initial estate planning can prompt considerations of legacy and the efficient transfer of assets. Younger KDMS members may see their philanthropic plans change as their wealth and family situation evolves. At age 40, you don't know how many children or grandchildren you might have, what will happen to your first or fifth startup, or what you might inherit. Starting early can allow you to plan more thoughtfully for the people and causes you care about. ●

# Planned Gifts as Class Reunion Gifts

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**Are you ready to return to campus in May to celebrate your reunion? Your planned gifts may count toward your class reunion gift.**

Life-income gifts made by June 30 of your reunion year can be counted toward your class reunion gift at the full face value of your gift. For bequest intentions, if you will be 65 years or older by the end of this fiscal year (June 30, 2022) and the purpose of your bequest supports MIT's core needs—students, faculty, and unrestricted resources—the present value of a documented bequest intention pledge may count for your class reunion gift as long as you also make an outright gift during your reunion year. Please contact the Office of Gift Planning to ensure that your gift is eligible to be counted toward your class gift or with questions about the class reunion gift bequest pledge policy.



## Sample Bequest Language

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Below is suggested language to share with your advisor if you would like to include MIT in your will or estate plan.

**I give [all of the residue of my estate OR an amount equal to X percent of the residue of my estate / thereof OR \$ \_\_\_\_\_] to the Massachusetts Institute of Technology (MIT), a Massachusetts nonprofit corporation, for its general educational and charitable purposes.**

We can provide sample language if you prefer your bequest to be designated for a specific purpose. Contact us to learn more about bequests.

This information is provided for illustrative purposes only and should not be considered legal or financial advice. We encourage you to discuss these options with your advisor.

## Contact Us

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Making a planned gift to MIT enables you to meet your financial goals while achieving your charitable aspirations, bolstering MIT's world-changing programs while providing income to you and/or your beneficiaries.

Ready to start the conversation?  
Contact us today!

**OFFICE OF GIFT PLANNING**

**617.253.4082**

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**[giving.mit.edu/contact-ogp](https://giving.mit.edu/contact-ogp)**



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Welcome to the latest issue of *Corridor*, MIT's gift planning newsletter. Inside are inspiring examples of how alumni and friends like you are ensuring that MIT has the resources to nurture talent, meet unexpected opportunities, pursue bold ideas, and tackle humanity's greatest challenges. Planned gifts such as bequests, gift annuities, charitable remainder trusts, and other types of contributions played a vital role in the recently completed MIT Campaign for a Better World. This collective generosity is a lasting expression of your commitment to strengthening the foundation of the Institute for generations to come. Thank you for sharing MIT's vision for a better world.

Julie A. Lucas  
*Vice President for Resource Development*

Read more about the impact of the MIT Campaign for a Better World at [betterworld.mit.edu/thankyou](https://betterworld.mit.edu/thankyou).