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*Planning for the Future.*



Tech campus in spring

**Michigan Tech**  
Create the Future

Michigan Technological University  
Spring 2014

A Financial and Charitable Gift Planning Guide

# Foresight



Birgit '91 and Allen '87 '92 '97 Sorgenfrei

Allen and Birgit Sorgenfrei may bleed black and gold, but they didn't fall in love at Michigan Tech. It took a bike ride through Europe during the summer of 1991 to forge a relationship between these two academic and athletic all-stars.

Allen, who was working toward a master's in electrical engineering, was originally planning a biking trip across the US, but soon learned that many Michigan Tech graduate student friends would be home in Europe for the summer. This offered a good opportunity to tour Europe with friends. Birgit, who had just completed a BS in Electrical Engineering, joined the tour for a few weeks. Two years later, they married and spent the next twenty years living and traveling

## Speaking the Same Language

*Tech Engineering Couple Bonded by Athletics, Music . . . and German*

throughout the world. The first opportunity to live in Germany came in 1994, while Allen was working on his PhD at the University of Hannover. The next opportunity came in 2006, when The Ford Motor Company transferred Birgit to Stuttgart, Germany, to work on fuel cell vehicles. Finally, in 2008, JCI transferred Allen to Changchun, China, to work on vehicle seating. Surrounding these overseas assignments, the family has traveled extensively, visiting more than fifty countries on six continents.

Birgit went on to earn an MSEE from MIT and an MBA from the University of Michigan–Ann Arbor. Allen completed his BS and MS in Electrical Engineering and a PhD in Mechanical Engineering–Engineering Mechanics from Michigan Tech in 1987, 1992, and 1997, respectively. They both earned certificates in German, Allen under the mentorship of longtime humanities professor Sigrid Weinmann. That training proved useful in Stuttgart. “Our

two daughters are now fluent in German,” Birgit said.

Allen has spent most of his career at Johnson Controls, moving to Ford Motor Company in 2013 as a seat engineer. Birgit has been part of the Ford team for twenty years and is now the global powertrain manager for powertrain installation.

While Tech academics laid the foundation for their successful careers, Birgit and Allen have a special place in their hearts for the extracurriculars, which they support through annual donations.

“We try to contribute every year to some of the groups we enjoyed so much while we were students,” Allen said. “We prioritize the ECE and mechanical engineering departments, but also the bands.” Birgit played flute in the Symphonic Band, while Allen joined the Pep Band trombone section.

“At the time, I was the longest serving Pep Band member—thirteen

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years,” he said. “I promoted the Crazy Hat Award by building [what else?] loud and crazy hats.” The award was renamed in his honor in 1993, and recipients’ names were included on the ceremonial Al Sorgenfrei Crazy Hat Award, which in its former life had been a pizza box.

The Sorgenfreis also give to the women’s tennis team—Birgit was a member—and to the Nordic ski team, which Allen joined back when it was a club. He still competes at the international level and helped develop the Maasto Hiihto ski trails in nearby Hancock.

“There were a lot of great opportunities,” he remembers. “When I first got to Tech, I wasn’t very motivated. Then I joined the track team, and that forced me to be better organized and improved my energy level. Students really need activities, and Tech is a great place to do things.”

Of course, Tech is also about academics, and Birgit remembers the help she received negotiating the tough electrical engineering curriculum. “My advisor, Bob Bohnsak, was instrumental in getting me through, as was John Lukowski. They assured me that I wasn’t the only one struggling,” she said. “That’s why I wanted to go to Tech originally, because the professors’ doors were always open.”

“I was pleased to be able to donate, on behalf of Ford, a 2012 Focus Battery Electric Vehicle to John’s Enterprise last year to prepare future electrification engineers,” she said. Lukowski advises the Automotive Computing Enterprise and helps coordinate the Hybrid Electric Vehicle Enterprise.

One thing that never interfered with her success at Tech was her gender, despite the fact that her classes were predominantly male.

“I was fortunate to feel comfortable hanging out with guys,” Birgit said. Plus, she enjoyed the company and support of other female students in the Society of Women Engineers. Eventually, she would receive the SWE Distinguished New Engineer Award and become a charter member of Michigan Tech’s Presidential Council of Alumnae.

Looking back, the Sorgenfreis recognize the role Tech played in their lives, and they give so others can enjoy the same benefits. Along with their annual giving, they have included a bequest to Michigan Tech in their estate plan.

Said Birgit, “We support Tech with our time and financial contributions, as Tech prepares graduates to achieve excellence and leadership in engineering careers, community contributions, and life.”

## 10 Reasons to Update Your Estate Plan

You’ve completed your estate plan and healthcare directives and put all the documents in a safe place. You’re done! Or are you? One thing we know for sure is that change is constant, and changes in your life can impact your estate plan.

Estate plans are affected by changes in the value of your assets, in your family, and in federal or state law. Therefore, it’s a good idea for you to sit down with your attorney every three to five years and review your plan. Given all the potential areas that can change, it’s quite likely that you may wish to modify some portion of the plan.

Here are a number of reasons to consider revising or updating your plan:

1. New children, grandchildren, or other heirs
2. Moving to a different state
3. Selling or purchasing a major asset



4. Reaching age 70½
5. The death of your selected beneficiary
6. Divorce or remarriage
7. A substantial change in the value of your estate
8. Your selected executor or trustee is no longer available.
9. You’re considering a bequest for Michigan Tech or other charities.
10. Your planning was done before the 2012 change in estate tax laws/thresholds.

Now is the perfect time to review your estate plan—or if you don’t have one, to get started. Many of the documents you have gathered to file your taxes may be useful in reviewing your plan.

### Free Planning Materials

Call our Office of Gift Planning at 906-487-3325 or return the enclosed reply card for helpful information on wills and estate planning.



# How to Put Together Your Family's Health History



*Dear Savvy Living,*

*What can you tell me about creating a family health history? My doctor recently suggested that I make one as a way to predict potential health problems as I get older, but I could use some help.*

Creating a family health history is a smart idea! Even with all the high-tech medical tests and procedures that are available today, an accurate family health history remains one of the most important tools for keeping yourself healthy as you age. Here's what you should know, along with some tips and tools to help get you started.

## **Inheritable Diseases**

Just as you can inherit your father's height or your mother's eye color, you can also inherit their genetic risk for diseases like cancer, diabetes, heart disease, and more. If one generation of a family has high blood pressure, for example, it is not unusual for the next generation to have it too. Therefore, tracing the illnesses suffered by your relatives can help you and your doctor predict whether you are at risk to develop certain disorders. Once these disorders are identified, you can take action to keep yourself healthy.

## **Family Tracking**

To create a family health history,

you'll need to start by collecting some basic medical information on your first-degree relatives, including your parents, siblings, and children. Then, collect information about your grandparents, aunts, uncles, and first cousins.

Important information includes the age when they developed heart disease, cancer, diabetes, arthritis, dementia, depression, or other health problems. If family members are deceased, you need to know when and how they died. If possible, include lifestyle information such as diet, exercise, smoking, and alcohol use.

Some relatives may not want to share their medical histories, or they may not know their family history. However, any information you discover will be helpful.

One great source of information is a relative's death certificate. This will list their cause of death and the age he or she died. To obtain a copy of a relative's death certificate, contact the vital records office in the state where your relative died or go to [vitalchek.com](http://vitalchek.com).

## **Helpful Resources**

To get help putting together your family health history, the US Surgeon General offers a free web-

based tool called "My Family Health Portrait" (go to [familyhistory.hhs.gov](http://familyhistory.hhs.gov)). This website can help you collect, organize, and understand your genetic risks and share the information with your family members and doctors.

Another great resource that provides similar assistance is the Genetic Alliance's online tool called "Does It Run In the Family" (go to [familyhealthhistory.org](http://familyhealthhistory.org)). This site allows you to create a free customized guide on your family health history. If you don't have Internet access, call 202-966-5557 and ask them to send you a free hard copy of these booklets in the mail.

If you're adopted, the National Foster Care & Adoption Directory Search may be able to help you locate your birth parents to get their medical history. See [childwelfare.gov/nfcad](http://childwelfare.gov/nfcad) or call 800-394-3366.

## **Managing Your Results**

If you discover some serious health problems that run in your family, don't despair. While you can't change your genes, you can change your habits to increase your chances of a healthy future. By eating a healthy diet, exercising, and not smoking, you can offset—and sometimes even neutralize—your genetic vulnerabilities. This is especially true for heart disease, stroke, type-2 diabetes, and osteoporosis.

A family medical history can also alert you to get early and frequent screening tests, which can help detect other problems (high blood pressure and high cholesterol, plus cancers like breast, ovarian, prostate, and colon cancer) in their early stages when they're most treatable.

*Savvy Living is written by Jim Miller, a regular contributor to the NBC Today Show and author of The Savvy Senior book. These articles are offered as a helpful and informative service to our friends and may not always reflect this organization's official position on some topics.*

# Tech Establishes Honors College for Plus-Factor Programs



Frank Pavlis '38 visits with students during a trip to campus.

Michigan Tech has created the Pavlis Honors College to unify many of the University's signature programs in leadership, research, and service.

The new College, which recognizes longtime friend and advocate Frank E. Pavlis '38, will include the Enterprise Program, the Pavlis Institute for Global Technological Leadership, the Honors Institute, and the Summer Undergraduate Research Fellowship Program. In addition, the College will house the National and International Scholarships and Fellowships office.

"As the success of these programs caused them to grow, it became clear that we needed to bring them together," said Max Seel, provost and vice president for academic affairs. "The Pavlis Honors College will create synergies across campus that will expand these plus-factor programs and develop new ones that build upon the same tradition of quality."

Pavlis's support of these programs began in 2005, when he underwrote

the Pavlis Institute for Global Technological Leadership. Since then, the Institute has enrolled nearly two hundred students. Their studies have taken them to Argentina, India, Malta, and Ghana, where they have worked on projects ranging from establishing a mobile health clinic to addressing solid waste disposal problems.

The Pavlis Honors College is the latest in a lifetime of meaningful accomplishments. Pavlis earned his BS in Chemical Engineering at Michigan Tech in 1938, graduating at the top of his class. Subsequently, Pavlis earned a master's in chemical engineering at the University of Michigan and participated in Harvard's Advanced Management Program. His career began in 1940, when he was one of the founders of Air Products and Chemicals. Pavlis rose through the ranks and was a member of the Board of Directors for many years during his career with the Fortune 500 company, retiring in 1980 as vice president of world trade.

"Nine years ago, we modeled the Pavlis Institute on Frank's extraordinary experiences," said Michigan Tech President Glenn Mroz. "We are grateful for his exceptional contributions and extremely proud that he is part of the Michigan Tech family."

## Michigan Tech's McNair Society

The McNair Society, named after Fred McNair, president of the University from 1899 to 1924, honors alumni and friends who leave a legacy for Michigan Tech through their estate plans. We welcome the following new members to the McNair Society:

**Galen H. Harrison '60**

**T. Dean Nguyen '73**

**Michael P. Russo '69**

**Walter '54 and Janet (dec.) Schalm**

Please contact our Office of Gift Planning if you have provided for the future of Michigan Tech through a bequest or a planned gift. We want to recognize you too with membership in the McNair Society.

### For More Information on Gift Planning



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# Foresight