

Spring 2026

The 1870 Society Newsletter

News for 1870 Society members
and friends of Syracuse University



J. Michael Haynie Appointed as 13th Chancellor and President



On March 3, Syracuse University announced J. Michael Haynie would become its 13th chancellor and president.

The appointment follows a unanimous vote by the Board

of Trustees and a search process that engaged students, faculty, staff, alumni, and the community.

Haynie has been part of the Syracuse University community for more than two decades, most recently serving as vice chancellor for strategic initiatives and innovation and executive dean of the Whitman School of Management.

He is the founder and executive director of the D'Aniello Institute for Veterans and Military Families. A 14-year veteran of the U.S. Air Force, Haynie helped establish Syracuse as one of the premier destinations in higher education for veterans and military-connected students, culminating in the National Veterans Resource Center.

Haynie holds a Ph.D. in entrepreneurship and business strategy and has earned national recognition for his scholarship and public service, including presidential appointments related to reform at the U.S. Department of Veterans Affairs. He has been recognized as a University Professor and recipient of the Chancellor's Medal.

"Syracuse University is not just an institution to me. It is home," Haynie said. "Our best days are ahead, and I'm ready to get to work."

Finding Home, Giving Back: Phyllis Berk '55

Phyllis found her life's path at Syracuse, and now she is ensuring future students can find theirs.



Phyllis Berk always wanted to go to Syracuse University. She was interested in working in television, and when she stepped onto campus for the first time in 1952, she found much more than what she expected.

"I remember feeling that I had found my home away from home," she recalls. "It was thrilling to walk into WAER, housed at the time in a Quonset hut behind Carnegie Library."

Everything felt new and electric. Phyllis pursued a dual major in English and radio-TV, eventually becoming WAER's traffic director, where she was responsible for every minute of the broadcast schedule. She graduated with honors as co-salutatorian. But when she looks back, it's not the accolades that matter most.

"I would describe my SU connection as foundational to who I am," she says. "These undergraduate years were some of the happiest of my life. Syracuse prepared me, and I'm everlastingly grateful."

Those years changed her life in another way too: through her SU connections, she found a job and

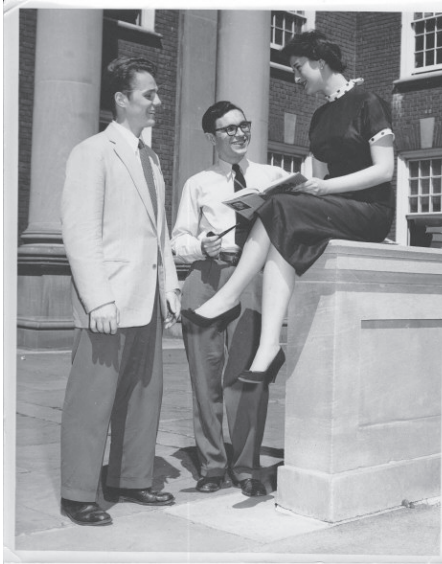
met Howard Berk, her husband of 60 years.

Phyllis started giving back immediately after graduation. "No matter what I could do, I would always do that." When she and Howard made their wills, Syracuse was included from the start.

Recently, her financial advisor suggested a simple new way to give: a beneficiary designation from her IRA. No expensive legal updates and no hassle.

Phyllis designated a portion of her IRA to the VPA Endowed Fund for Drama and Musical Theater, inspired by her daughter, now an award-winning cabaret singer in New York City. The gift started at \$10,000 and is already growing.

"I like the idea of it keeping on growing," she explains. "Even at my age, I'm not checking out



anywhere yet. I have too many things to do."

Phyllis wants others to know you don't have to be wealthy to leave a legacy. "I give a little bit to a lot of organizations I believe in. You do what feels right for you. This keeps on giving."

"The reason I give to Syracuse is to pay forward the values I received and help students gain the sense of extended family as they prepare for an ever-changing and challenging world."

>>> Phyllis is shaping the future of Orange <<<

If you want to shape the lives of future students, a gift like this can make that vision a reality. Read about the benefits of a beneficiary designation to SU on page 3.

Give a Gift That Costs You Nothing Today

When you think about charitable giving, you probably picture writing a check or clicking “donate now.” But a powerful way to support Syracuse University doesn’t cost you a penny during your lifetime, and it’s how donors like Phyllis are making a lasting impact. A beneficiary designation lets you make a significant impact through assets you already own.

What Is a Beneficiary Designation?

Many financial accounts — bank, investment, retirement, or life insurance — let you name a person or organization to receive funds when you pass away. Naming Syracuse is easy: no lawyers or will updates required, most providers let you make changes online in minutes, and you retain full control of your money during your lifetime. You can designate a percentage or the entire balance.

A Tax-Savvy Choice: Retirement Plans

If you leave a traditional IRA or retirement plan to heirs, they may owe significant income taxes on that money. Naming the University as beneficiary also means 100% of your funds support future generations of students rather than losing a portion to taxes. That’s exactly what Phyllis did. After her financial advisor suggested she not go through the expense of updating her will, Phyllis designated a portion of her IRA to the VPA Endowed Fund for Drama and Musical Theater.

If You’re 70½ or Older: The QCD

A Qualified Charitable Distribution lets you direct up to \$111,000 (in 2026) from your IRA to Syracuse. The money is excluded from your taxable income — lowering your tax bill even if you don’t itemize. And if you’re taking Required Minimum Distributions, a QCD can satisfy that requirement.



Senior Alumni Reunion 2026

Syracuse University’s Senior Alumni Reunion is set for April 23 and 24.

We’ll celebrate all classes from 1951 to 1976 with a special reunion dinner, an exclusive visit with Syracuse University Archives (including an exhibit featuring nostalgic memorabilia from your time on campus), tours, and our awe-inspiring Syracuse University Alumni Awards, including the Eggers Senior Alumni Award. This special two-day celebration is a chance to reconnect with classmates, revisit beloved campus locations and honor your enduring Orange pride. It’s also a meaningful time to celebrate your legacy with a gift to Syracuse University—whether supporting scholarships, your college, or a program close to your heart.

Check out our website for full details: cc.syr.edu/seniorreunion.

Roth IRA Conversions and Charitable Giving

If you've ever run the numbers on a Roth conversion, you know the central question: will my tax rate in retirement be high enough to justify paying taxes on the conversion now? For many people, the answer is a frustrating "maybe." The math is close, the assumptions are uncertain, and the decision stalls. But there's a variable most Roth calculators leave out entirely: charitable giving.

For donors who are already inclined to support the causes they care about, a well-timed charitable gift can dramatically reduce the tax cost of a conversion—shifting what might be a marginal decision into a clear one. **That's why we're excited to share a new tool now available on our website: the Roth Conversion Calculator with Charitable Offset.**

Unlike most calculators that answer a single yes-or-no question, this one models the full picture. It shows your conversion breakeven rate with *and* without a charitable offset, across three distinct planning goals: reducing required minimum distributions, growing tax-free income for your future self, and reducing the tax burden your heirs will face from inherited retirement assets.

Here's why that matters: when you make a charitable gift in the same year as a Roth conversion—whether through a direct gift, a donor-advised fund, or a gift of appreciated stock—the charitable deduction can offset a significant portion of the tax bill the conversion creates.

The result is that you move money into a tax-free account at a lower net cost, and you support the organizations and institutions you already care about. We encourage you to try the calculator and see how things change when a charitable gift becomes part of the plan.

Visit us at go.syr.edu/roth or scan the QR code to input your numbers and explore the scenarios that match your goals. Questions? We're happy to think through the options with you.



Your legacy matters.
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The 1870 Society

Your planned gift to Syracuse University will have a strong and lasting impact, preserving the University's cherished past, while securing its bright future. To properly thank and welcome you as an 1870 Society member, please let us know of your intentions. This ensures the University understands how you would like your gift to be used. If you would like to remain anonymous, we will gladly honor that request.