

FALL 2024

A TEXAS A&M FOUNDATION PUBLICATION

Heritage



TEXAS
A&M
FOUNDATION

AGGIES WHO INSPIRE

Whether on campus, in the military or within their own families, Aggies are leading by example and planning gifts that will inspire others to follow.

Legacies Live On

In the world of higher education—where new journeys begin, passions unfold and lives are forever changed—there's rarely a shortage of inspiration. Across a thriving 5,200-acre campus like Texas A&M University, you're sure to find a myriad of deserving causes to support, create, restore or improve. But when it comes to meeting a vision with action, it's far less common to discover the fearless and inspiring few who lead the way.

To me, former President George H.W. Bush was that type of leader. As both a role model and a close friend, I looked up to him not only for the wise words he shared but also for the action he took in honoring his noble calling and treasured values. Beyond the national and international impact he had as president, he demonstrated what it meant to live a life of selfless service through his fervent advocacy and support of charitable causes, which included Texas A&M. When it came to making a difference, President Bush led by example, and because of that, his legacy continues to inspire countless others to do the same across our state, nation and world.

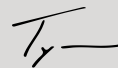
This, my friends, speaks to the incredible power of philanthropy. Similar to great leadership, bold generosity creates opportunities far beyond the bounds of its benefactors. It gives the world a chance to witness the life-changing impact of giving and encourages others to believe in their ability to follow suit. The desire to give may stem from personal integrity, but the decision to give is often motivated by a chord-striking example set before you. The chain reaction of paying it forward often starts with one person, and in Aggieland, we are fortunate to

have so many forward-thinking individuals willing to assume this role for the betterment of students, faculty and staff at Texas A&M.

In this issue of Heritage, you'll find several shining examples of leaders who inspire, whether on campus, through business, in the military or within their own families. Each of their stories illustrates the unique ways that philanthropy, specifically planned gifts, can present opportunities for people in all walks of life to leave a personal legacy—one that influences Aggies not only to succeed but also to invest in the success of others for generations to come.

After all, as President Bush once said, "There can be no definition of a successful life that does not include service to others."

Thanks for all you do.



Tyson Voelkel '96
President & CEO
Texas A&M Foundation



PLANNING A BRIGHTER FUTURE FOR AGGIELAND

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What Inspired Your Planned Gift?

[READ MORE RESPONSES ONLINE AT GIVE.AM/PLANNED-GIVING-INSPIRATION](https://give.am/planned-giving-inspiration)

OUR BELOVED AGGIE DAUGHTERS

My wife, Mary Patricia “Pat,” and I endowed our first scholarship after our 52-year-old daughter, Marlenè Elise (Marshall) Neathery '85, passed away from cancer. Marlenè was an Aggie's Aggie. After graduating with a double degree in management and marketing, she began her career while completing her MBA. When she was 34, she married Charles Neathery '88, and they raised sons Kyle and Trenton, who were only 14 and 12 when she passed away. We wanted to honor Marlenè and her loyalty to Texas A&M, and we felt that she would've appreciated a scholarship for Mays Business School. We enjoy the rewards of this decision when we interact with her scholarship recipients. Marlenè is inurned at the Aggie Field of Honor Cemetery in College Station, and her columbarium faces Kyle Field.

We later decided to endow another scholarship to honor our oldest daughter, Michelle Elizabeth (Marshall) Crotty '84. This scholarship supports biomedical sciences undergraduates, while recognizing Michelle and

her determination to complete her degree after unexpectedly suffering from toxic shock syndrome, which was discovered after her then-boyfriend, Matthew Crotty '82, found her unresponsive in her dorm room one day. That same December, they married on the day Matthew graduated and was commissioned a U.S. Marine. Michelle completed 90+ hours and got her Aggie Ring by their wedding, but she re-enrolled years later and finished her degree in 1987 while raising sons Sean and Christopher '06 during one of Matthew's deployments.

Pat and I are extremely proud of our daughters and their embodiment of the true meaning of being an Aggie. We continue to equally increase the investment in each of their named scholarships every year through a qualified charitable distribution from our IRA assets.

Robert E. “Gene” Marshall '60
Canyon Lake, Texas



GENE, MARLENÈ, SEAN,
CHRISTOPHER, MICHELLE
AND PAT WITH 'SULLY'
NOVEMBER 1987

A CHALLENGING TRANSITION INTO INDUSTRY

When I took my first job after receiving my Ph.D., I struggled adjusting to the business world. Not having gained business experience from an internship, I found it challenging to transition from the academic setting. My wife, Patricia, faithfully supported me during this time.

In 2016, Patricia and I met the head of the Department of Chemistry, Dr. Simon North, and Texas A&M Foundation team members to discuss establishing an endowment. We originally envisioned a scholarship, but Dr. North discussed his efforts to better prepare graduate students for their careers after finishing their Ph.D. I shared about my own tough transition, and the result was the Dr. Matthew A. '82 and Patricia J. Harthcock Professional Development Symposium Fund—a symposium to help chemistry graduate students successfully transition into their careers. We've extended the support of this well-received symposium with an estate gift. We're so blessed and thankful that we can provide this lasting legacy to impact many individuals and make better employees!

**Dr. Matthew "Matt"
Harthcock '82**
Sun City Center, Florida

COMPETING WITH MY LONGHORN WIFE

My wife graduated from The University of Texas, as did both of my daughters (I know that shows poor leadership on my part). During a conversation one day between my wife and youngest daughter, whose job entailed fundraising for UT, the idea of my wife putting UT in her will and funding the donation with her IRA was presented. My first thought was "bullsh**!" But, I came around and decided to fund Texas A&M the same amount.

My gift will support the Corps of Cadets, and I've encouraged my Gator 2 buddies to think about planning a gift for the Corps. It's an honor and privilege to contribute to Texas A&M. The education and training provided me with the best friends I could ever hope for and a wonderful career in the military and later with Delta Air Lines.

William "Bill" Turner '71
Lake Kiowa, Texas

THE DESIRE FOR MY LEGACY TO HELP AGGIES

Several years after graduation, a Texas A&M Foundation team member educated me on many programs and charitable options I wasn't aware of. I don't have children, so I considered my legacy and what to do with my estate. Through this process, I learned a lot about the legal and financial aspects of estate planning.

I've been blessed with a successful career, and I desired to share my blessings with students on a similar path. The Foundation allowed me to give back in a way that's important to me, splitting my gift between my two majors that will ultimately benefit staff and students. Additionally, I have tremendous respect for our veterinary school and Aggie veterinarians, so the remainder of my gift will benefit the vet school.

My heartfelt gratitude is due to the outstanding Foundation staff for working with me to develop a plan that fits perfectly with my goals. It's given me much peace knowing that my wishes will be executed per my requests.

Michele Tyson '99
Katy, Texas

OUR FAMILY'S LEGACY

As a child, I was introduced to the Aggie way by my grandparents and parents. My grandfather, O.T. Hotchkiss Jr. '24, had 50-yard line tickets to all Aggie home games for years, and he was also a past president of The Association of Former Students. After he passed away, my grandmother set up our first President's Endowed Scholarship (PES) in his honor. In fact, our first recipient is from the program's inaugural year in 1968. I have the plaque hanging on my wall along with a photo of my brother and me accepting it from Randy Matson '67!

After my father, Dr. O.T. Hotchkiss III '51, passed, we made our second PES gift in his honor. At that moment, I decided to incorporate our third PES in my name in our estate plan. It's our way of cementing our family's legacy at Texas A&M. Since then, my wife, Nancy, and I attended our first annual PES luncheon in fall 2023, and we really enjoyed meeting our



**NANCY & TED HOTCHKISS (CENTER)
2023 PES LUNCHEON**

family's current scholars. It confirmed that our support will educate the crème de la crème of Aggieland's future leaders!

Oscar T. "Ted" Hotchkiss IV '77
Ponte Vedra Beach, Florida



LASTING LEGACY

ELEMENTS OF GIVING

BY DORIAN MARTIN '06 | PHOTOS BY JOHN DAVIDSON

HOW MELBA AND DR. LAVON ANDERSON '57 '65 '67 USED CHARITABLE REMAINDER UNITRUSTS TO PROVIDE FINANCIAL SECURITY FOR THEIR GRANDCHILDREN AND SUPPORT FOR CHEMICAL ENGINEERING STUDENTS.

Growing up in rural Melvin, Texas, Dr. Lavon Anderson '57 '65 '67 developed a strong commitment to faith, family and education. Those foundational values helped the chemical engineer build a successful life that continues to influence future generations not only in his family but also at Texas A&M University.

His grandson, Parker Heath '18 '20, is one of many young lives he's invested in. "When I was younger, my grandfather was my favorite superhero," Heath shared. "As a teenager, he became my role model. Now that I'm older, he has become both my mentor and my North Star, guiding me toward what I hope to achieve in life."

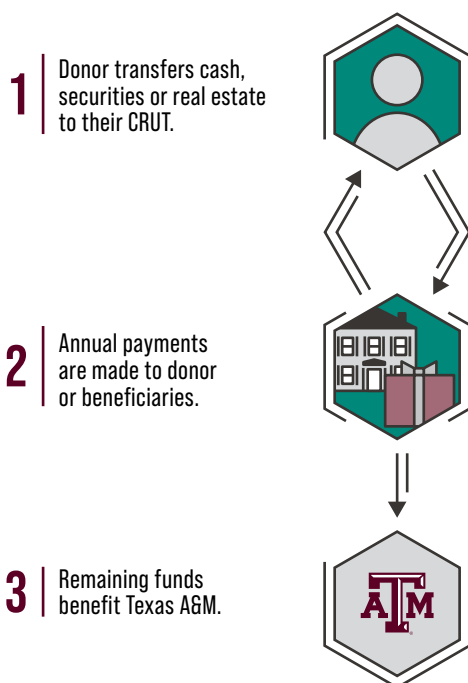
Part of Anderson's guidance involves encouraging financial security. In the early 2000s, he and his late wife, Melba, explored how planned giving could help their extended family flourish in the long term while also supporting Aggies. They realized that a charitable remainder unitrust (CRUT) could accomplish both goals and turned to the Texas A&M Foundation's team for counsel. "By the time we met with the Foundation, we had decided on a unitrust but didn't know the details," Anderson said. "They made the process easy because they were so knowledgeable."



As a result, the Andersons used cash to create three CRUTs of equal amounts—one for each of their grandchildren, who were ages 8 to 10 at the time—that provided payments to their grandchildren for 20 years. “The CRUT that my grandparents set up for me was meant to ease the financial burden of a modern college education and ensure that I was well educated,” explained Heath, who earned his bachelor’s in chemical engineering and master’s in biotechnology. “It represents so much more than just the financial value it accrued over the years; it symbolizes the deep love they hold, and have always held, for my family and me.”



THE SCIENCE BEHIND A CRUT



All three CRUTs have now terminated and are supporting the Department of Chemical Engineering with endowed scholarships and graduate fellowships. “Graduate students make invaluable innovations and novel discoveries that impact society and communities,” said Dr. Faisal Kahn, head of the Artie McFerrin Department of Chemical Engineering. “Dr. Anderson’s graduate fellowships help enable their work.”

One such graduate student is Max Wolff '23 '25, the inaugural recipient of the Melba and Dr. Lavon Anderson '57 Fellowship in Chemical Engineering. After delving into the world of chemical properties while earning a bachelor’s in materials science and engineering, the Houston resident is expanding his knowledge of chemical systems in the master’s in chemical engineering program. “I’m exploring topics like how a change in one property may influence another, or how it can influence a chemical reaction,” he shared.

But beyond the classroom, Wolff is also getting a good education on the value of generosity and Aggies paying their success forward. “Dr. Anderson’s fellowship has helped relieve my financial stress,” explained Wolff, who plans to pursue a career in industry research. “Whether it’s helping with groceries, textbooks or my next fuel stop, this fellowship has relaxed my mind about finances so I can focus on my studies.”

Anderson believes these gifts are a way to show his appreciation for the lifelong support he received from his Aggie family. He recalls a boyhood trip accompanying his father to shop for tires in nearby Brady, Texas, where he met World War II hero and future Texas A&M President Gen. James Earl Rudder '32, who worked at the business. That interaction, combined with meeting Brady-native rancher G. Rollie White, a member of the Class of 1895 and later of the Texas A&M University’s Board of Directors, paved the way for Anderson, a self-described “naïve country boy,” to enroll in Texas A&M and go on to earn his bachelor’s, master’s and doctorate degrees in chemical engineering.

With his grandchildren now in adulthood, the College of Engineering’s 2001 Outstanding Alumni recipient—who relied on a fellowship to help pay for graduate school—is relishing watching the fruits of his professional success support Aggie engineers like Wolff. “I accomplished things in my career that wouldn’t have been possible without the generosity and guidance of former students,” Anderson said. “Graduate school isn’t easy, so I’m happy that I can now help Aggie engineers who follow in my footsteps.”

Interested in helping family members and future generations of your Aggie family? Contact our team to learn if a charitable remainder unitrust is ideal for you: **979.845.8161** or plannedgiving@txamfoundation.com.

Inspired to INSPIRE

MOTIVATED BY THE IMPACT OF THEIR OWN SCHOLARSHIP SUPPORT, DRs. KARIN AND R. BOWEN LOFTIN '71 ARE UTILIZING CURRENT AND PLANNED GIFTS TO FULFILL A PHILANTHROPIC VISION FOR TEXAS A&M UNIVERSITY NOW AND FOREVER.

BY SAMANTHA ATCHLEY '17 '19 | PHOTO BY JOHN DAVIDSON

With three acceptance letters in hand in spring 1967, Dr. R. Bowen Loftin '71 had a difficult decision to make between several prominent Texas universities—the cost of his future weighing heavy on his mind. Thankfully, his choice became clear when the lasting legacy of a generous Aggie graced his Navasota, Texas, mailbox.

“In the midst of my financial challenge, an incredible thing happened,” Bowen recalled. “About a month after receiving my acceptance, Texas A&M University sent me a second letter offering a full-ride scholarship. It was a godsend and made my decision even easier.”

The support that initiated Bowen’s journey to Aggieland was made possible through the McFarland Physics Scholarship, a gift planned long before Bowen’s time to afford quality education to Aggies pursuing physics at Texas A&M.

“That experience is what introduced me to philanthropy,” Bowen said. “The thought of a person—someone I’d never have the chance to meet—caring that much about Texas A&M and the future of its students was a lesson I’d never forget, and it has certainly inspired how I’ve chosen to give back.”



Presidential Path

After receiving his bachelor's degree a year early from Texas A&M in 1970, Bowen followed his dream of becoming a professor through a master's and Ph.D. program at Rice University, a decision that would prove to pay off in more ways than one. When fellow classmates invited him to a social gathering at a local bar, Bowen engaged in a life-changing game of foosball against a particularly intriguing opponent—his future wife, Karin.

"I let her win," Bowen laughed. "We started spending a lot of time together after that, studying for exams and pursuing our academic careers. It was a whirlwind, but we were married soon after in the fall of 1972."

Both embarking on careers rooted in research, the pair made incredible strides in each of their respective fields: Karin in her expertise of immunology and infectious diseases, and Bowen in academia related to artificial intelligence, computer science, materials science and physics. After gaining years of experience as a professor at the University of Houston and Old Dominion University, Bowen was called to become vice president and CEO of Texas A&M University at Galveston—a move that foreshadowed the Loftins' forthcoming impact on Aggieland.

"Professionally, it was always my goal to help students be successful," Bowen said of his passion. "Although I assumed a more administrative role in Galveston, I still made meaningful connections and came to know every faculty member, staff member and most students by name on that campus."

When his leadership style landed Bowen the role of 24th president of Texas A&M University in 2010, he stayed true to his methods, making himself one of the most well-known leaders among the Aggie student body to date—often spending hours of his personal time responding to student messages on social media and keeping in touch with campus life. Characterized by his striking bowties, authentic personality and monumental guidance through the university's historic transition into the Southeastern Conference, Bowen captured the attention and hearts of Aggieland during his tenure.

"Approaching the president of a university the size of Texas A&M would normally require numerous layers, but my goal was always to make myself accessible to students," he said. "At minimum, I spent an hour a day on campus—either in Academic Plaza, the Memorial Student Center or perhaps Sbisa for lunch—and just visited with Aggies. That was my fix for the day."

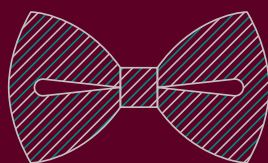
Fearless Leaders in Philanthropy

Throughout every role and even into retirement, Bowen's core passion for learning, education and bolstering student success stood firm, inspiring a philanthropic impact at Texas A&M and beyond. As a shared effort, Bowen and Karin have made numerous gifts in reflection of their humble academic beginnings and hope for the future—providing vital support to Texas A&M University at Galveston, the Bush School of Government and Public Service, the Hagler Institute for Advanced Study at Texas A&M, and the university's newest academic unit: the College of Performance, Visualization and Fine Arts.

FUN FACTS

ABOUT AGGIELAND'S
FORMER PRESIDENT

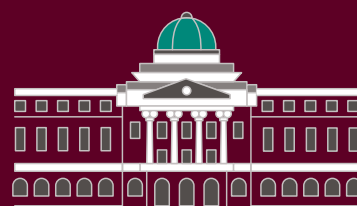
BOWTIES OWNED



300+

(At least since the last time he counted)

FAVORITE CAMPUS SPOT



Academic Plaza

“Similar to Bowen, it would have been difficult for my parents to support me through college without a scholarship,” Karin said, noting that she and her mother immigrated from Germany in 1959. “Our philanthropic goals are deeply inspired by our own experiences of being helped through the process of achieving our education.”

Following retirement, the Loftins met with an estate planning attorney to determine the most suitable planned giving options to increase their philanthropic impact beyond their previously established endowments. According to Bowen, their philanthropic direction never changed; the couple simply recognized two phases of life: “one where you have the wherewithal to give directly, and one after lifetime.”

“Karin and I agreed that we had enough assets to use our retirement accounts to fund our charitable giving and leave our non-retirement accounts to our kids and grandkids,” he said. “It worked for us uniquely that our total net worth is roughly split 50/50 between our heirs and our favorite charities, and our planned giving will further augment the endowments we’ve established.”

Choosing to make planned gifts through their IRAs, the Loftins simply designated the Texas A&M Foundation as the beneficiary of their retirement accounts. Additionally, when they reached 70 years of age, they both opted to use a qualified charitable distribution to satisfy their required minimum distributions and establish two new endowments aligned with each of their interests. Karin used hers to support the Bush School in her parents’ honor while Bowen funded an endowment through the 12th Man Foundation to support Aggie student-athlete

education in honor of the late Mike Slive, former Southeastern Conference commissioner.

“We’ve tried to exploit every tool in the toolbox to generate ways for our retirement assets to benefit a selection of beneficiaries, with Texas A&M being a large focus for us in various aspects,” Bowen said.

Of these tools, the Loftins recommend that donors utilize one of the most influential in their experience: the Texas A&M Foundation’s planned giving team. As someone with extensive Texas A&M knowledge and experience in higher education philanthropy, Bowen’s words speak volumes.

“With resources like the Texas A&M Foundation’s team at your fingertips, I encourage people to explore giving opportunities at Texas A&M and find something that excites you. The more you learn about Aggieland, the more charitable needs you’ll see—and when you find it, don’t hesitate to share it with someone else, because giving begets giving, after all.”

DR. R. BOWEN LOFTIN '71

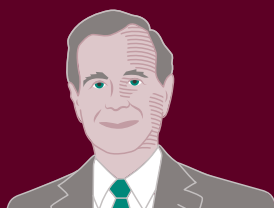
Interested in exploring planned giving options to shape your own impact on the future of Aggieland? Contact our team for more information about philanthropic methods best suited for your specific goals: [979.845.8161](tel:979.845.8161) or plannedgiving@txamfoundation.com.

ADORED AGGIE TRADITION



Muster

ADMIRLED LEADER



**Former President
George H.W. Bush**

MOST MEMORABLE
PRESIDENTIAL MOMENT


**An audience member
charged the stage at a
graduation—seemingly
beelining toward him—
only to propose to the
senior about to receive
her diploma.**

DISCOVER

Q&A

GENERATIONS OF GENEROSITY

BY CHRYSTAL HOUSTON | PHOTO BY JOHN DAVIDSON



RON BARCLAY '68 DISCUSSES HIS FATHER'S CHARITABLE GIVING AND EXPLAINS WHY HE AND HIS WIFE, SANDY, ARE CONTINUING THIS FAMILY TRADITION WITH THEIR OWN PLANNED GIFT.

From business acumen to people skills to generosity, parents seek to instill the values that will guide their children to lives of success and meaning. Such was the case for two generations of Aggie supporters, Randall “R.C.” Barclay and his son, Ronnie “Ron” Barclay '68.

In 1986, R.C. and his wife, Dee, designated a charitable remainder unitrust (CRUT) to Texas A&M University, a dual-benefit gift mechanism that provides financial support to the university as well as income to the donor or their beneficiary. Ron and his wife, Sandy, carried on the family tradition by establishing the same type of gift in 2000.

We caught up with Ron to discuss his family's connection to and continuing impact on Aggieland.

How did your family first become acquainted with Texas A&M?

My best friend had an older brother who was an Aggie. Hearing about and seeing his experiences—and of course his senior Corps of Cadets boots—inspired my decision to attend Texas A&M. When my dad visited me, he quickly grew fond of Texas A&M and its core values. My twin sister also met her husband on campus, an Aggie buddy of mine. It's a place that's near and dear to all of our hearts, including my two sons, Chris '94 and Scott '97, as well as my sister's son, Randy Hutchison '95, and his daughter, Caroline '26.

So, your dad became involved at Texas A&M as a proud Aggie parent?

Yes, but that was only part of the story. He was one of the founders of Randalls Food Markets, which started with two stores in 1966 and grew to 116 across Texas before it was sold to Safeway in 1999. He was a talented businessman, respected by his employees and colleagues. When Dr. Len Berry—an expert in services marketing and now a university distinguished professor—started the Center for Retailing Studies at Mays Business School, he invited Randalls to be a founding sponsor. My dad befriended Dr. Berry and other leaders like Dr. Benton Cocanougher and Dr. Bill Mobley. He believed in their work and eventually established a planned gift in 1986 to support the business school's future.



When Dad passed, our family asked for donations to the Center for Retailing Studies in lieu of flowers. The huge outpouring of support from Randalls employees, business associates and friends provided library resources for the center. Our family then provided a gift that was matched by Randalls to create the R.C. Barclay Reference and Retailing Resources Center in the Business Library and Collaborations Commons on West Campus.

Why have you continued the family tradition of giving back to Texas A&M?

There's no doubt Texas A&M made me and my sons better individuals. I'm proud of what my Aggie Ring stands for, and I hope Texas A&M will continue attracting and educating outstanding students to help them achieve success. Texas A&M is about camaraderie, helping one another, ethics and character building. I want to grow that in the lives of today's students so they can make the world a better place for our future.

Why did you and Sandy choose to also make a planned gift via a CRUT?

It was a way to give now and still enjoy the benefits of those assets during our lifetime. Plus, the investment grows over time, so you get to see your gift increase. Sandy and I liked the idea of earning income from the gift as well as tax benefits and having it impact the university in the end.

How do you feel about estate giving and passing on that value to your children?

I expect that giving back to Texas A&M will continue to be important to my children as they age, but that will ultimately be their decision. We do talk about it as a family, though. They know about my estate plan and how it will benefit Texas A&M and other organizations that are important to me, as well as my family.

I feel good knowing that when Sandy and I are gone, our gifts will benefit generations of Aggies to come. My dad and I worked hard at an early age to build what we did. I started working for him at 14 years old, and his career began at age 12 with a pair of mules and a wagon, making deliveries for the commissary at a sawmill in the East Texas Piney Woods. It's important to teach your kids the rewards of working hard and building a career and a life they can be proud of.

Interested in learning about estate gifts that provide for your family and your Texas A&M passions? Contact our team at **979.845.8161** or **plannedgiving@txamfoundation.com**.

MISSION AGGIELAND...



BY TORIE NOELLSCH

With a recently earned zoology degree from Texas A&M University in spring 1975, Dr. Marsha McCord Takao '75 '88 '07 applied to wildlife biologist positions. When the phone failed to ring, she pivoted.

"My dad was a World War II Army veteran, so I visited a local recruiter that summer," Takao said. "I was greeted with, 'Have you graduated high school?'" To the recruiter's surprise, the fresh-faced college graduate's scores qualified her for every military occupational specialty (MOS). The program she was interested in didn't have training until December, so Takao left disappointed but with a plan. "I drove to my dad's barber shop and said, 'I think I just joined the Army.'"

A few weeks later, more MOS trainings opened—including her top choice of fixed cryptographic equipment repair. "It was a four-year enlistment, and I had to leave that weekend," Takao recalled. "My parents were out of town, so I called to let them know I was

leaving for basic training. The recruiter picked me up on Sunday morning at 4 a.m., and my military career began. It was definitely a whirlwind moment, which was probably a good thing because it didn't give me much time to think."

AN AGGIE RECRUIT

Through her impressive 20-year Army career, stationed in Belgium, Germany and bases across the nation, Takao earned her peers' respect and was offered opportunities to grow her leadership and education. However, one of her most memorable opportunities occurred when she was commissioned a second lieutenant and was sent to Fort Bliss, Texas, where she met her husband of 25 years, Alan.

Raised in Oregon, Alan was unfamiliar with Texas A&M until Takao treated him to Midnight Yell and a football game when they were in between assignments. "On the way to Midnight Yell, he was poking fun," she said, "but after the

football game, he mentioned that we should come back."

Four years later, the opportunity presented itself when Takao was accepted into the Army's fully funded graduate degree program and joined Texas A&M's industrial engineering department as a master's student in fall 1986. At that point, Alan—a lieutenant colonel—had transitioned from active duty to the Army Reserve and wasn't about to miss his chance to become an Aggie. He followed suit, earning a master's in industrial engineering in 1993.

During this time, the couple developed a strong appreciation for Aggieland and knew one day they'd probably return for the long haul. "When it came to money, Alan was tighter than bark on a tree," Takao smiled, "so it surprised me when he bought an Aggie Ring because they weren't cheap. He drank the Kool-Aid and was officially an Aggie."

"There's not much I need to do before my final days because my estate plan covers everything, and I feel confident the Foundation will carry out my wishes."

— DR. MARSHA MCCORD TAKAO '75 '88 '07

PLANNING HER NEXT MOVE

In 1995, a couple bases later, Takao retired from the Army as a major and she and Alan moved to Bryan. Both sports enthusiasts, they ushered Aggie football and basketball games, and Takao even used her GI Bill to earn her Ph.D. in educational administration—a degree she later used working for the university.

When Alan passed away in 2005, Takao worked with an estate planning attorney to establish a living trust. Around this time, she met Texas A&M Foundation planned giving officer Amy Bacon '91 at an MSC tailgate and discussed her intentions of naming the Foundation as her primary beneficiary. She called Bacon several years later, and they met with Takao's financial advisor. Knowing Takao's estate included mineral interests and several pieces of property in Louisiana and Texas, the Foundation's real estate team also joined the conversation to lend their expertise.

With a solid gameplan in place, Takao is relieved to know what will happen to her assets after her life, and she's happy they will support student veterans, the Corps of Cadets and women's athletics at Texas A&M. "There's not much I need to do before my final days because my estate plan covers everything, and I feel confident the Foundation will carry out my wishes."

Takao's wishes are driven by her military service that opened her eyes to others' disparities. "When I worked with trainees, I learned that many joined the Army because they had no choice—they had nothing. I want to leave a legacy that helps people by creating educational opportunities that can improve their lives."



Through her living trust, Marsha is leaving mineral interests and multiple properties for the Texas A&M Foundation's real estate team to manage and sell after her lifetime that will benefit her Texas A&M passions. By leaving these assets to the Foundation in her trust, she can continue using them during her life and avoid burdening distant relatives with managing them after.

There are multiple ways to leave real estate to the Foundation that are mutually beneficial for you, your family and Texas A&M. To learn more about how you can use your property to create a lasting legacy in Aggieland, contact our team at **979.845.8161** or plannedgiving@txamfoundation.com.



Detach here, fold, tape and drop in mail

Do you have a gift for Texas A&M in your estate plans?

If you have already named the Texas A&M Foundation as the beneficiary of a planned gift but have not notified us, we want to welcome you as a Heritage Member. Please contact the Foundation's Office of Planned Giving to join the thousands of other donors who have left a powerful legacy of support for future generations of Aggies. If you want to create a future gift for Texas A&M, our experienced planned giving team will work with you, your attorney and other advisors to design the best gift plan for your unique needs and interests. Through planned gifts, you can honor and/or provide for loved ones, receive tax benefits, generate potential retirement income and help Texas A&M, all at the same time.

☐ I am interested in learning more about planned giving options to support my Texas A&M passions. Please send me more information.

☐ I want to know more about charitable remainder unitrusts that provide annual payments to me or my loved ones. Please have a planned giving team member contact me.

☐ Please *email / mail* (circle one) me your estate planning resource, "**Aggieland's Ultimate Estate Planning Kit**," with more information about creating a will.

If you include the Texas A&M Foundation in your estate plans and inform us of your intentions, you can become a Heritage Member.

☐ I have included the Texas A&M Foundation in my estate plans, but I have not previously notified you. Please send me more information about the next steps to becoming a Heritage Member.

Name (please print) _____

Address _____

City, State, Zip _____

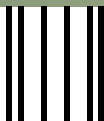
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Email Address _____

Comments/Special Request _____

All information is confidential

Request your free copy of
Aggieland's step-by-step
estate planning kit.



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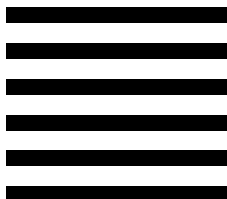
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A LOOK BACK

A Tradition to Yell About



You'd be hard-pressed to find an Aggie couple with deeper roots to the Texas A&M experience than Kathryn '95 and former Yell Leader Brian "Scott" Whitaker '95—especially regarding the university-defining Yell Leader tradition. To demonstrate their passion in perpetuity, the couple established a planned gift in their will to support all who wear the iconic white for generations to come. **Scan the QR code above to read the full, inspiring story about how they passed it back to pay it forward.**

Scott is featured on our cover this issue with 2024 Yell Leaders Josiah Brantley '25, Jake Carter '25 and Luke Widener '26. Photo taken by Max van Otterdyk.

