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RODEO ROYALTY

Texas agricultural legend Manzell Leroy "Shafe" Shafer '67 and his wife Nancy establish an impactful planned gift for Texas A&M.

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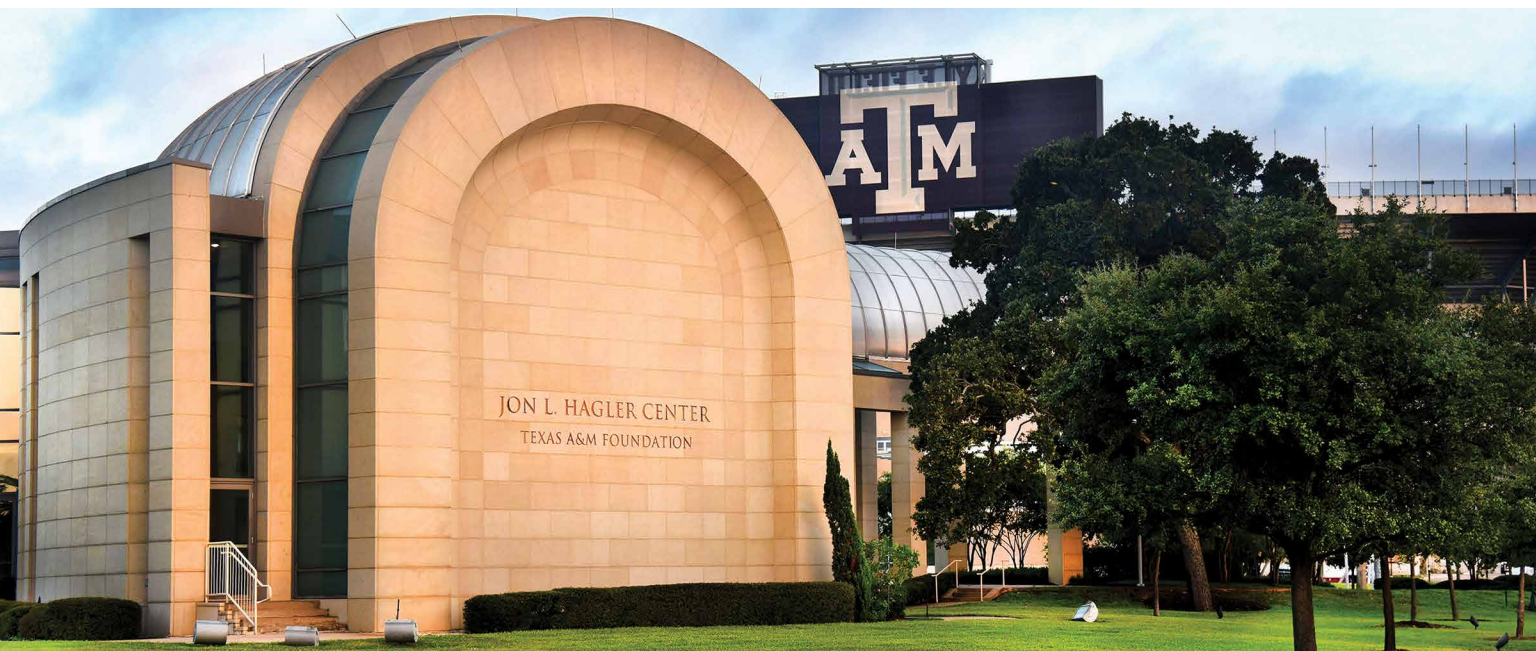
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Women, & Wealth Wisdom



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Karla K. Morton

2010 Texas Poet Laureate
and Award-Winning Author



Keynote Speaker:

Cindy Quinn

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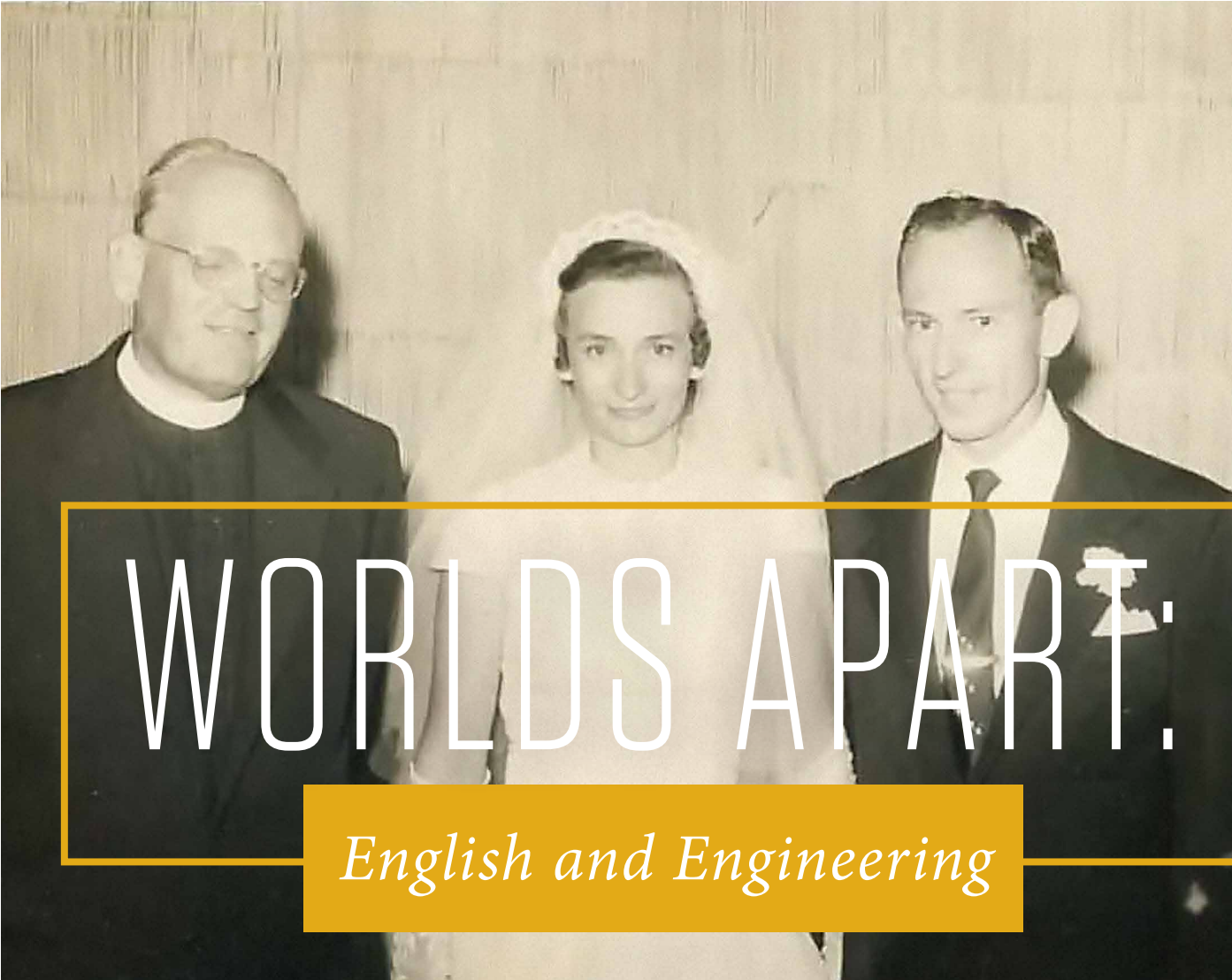
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FRIDAY, MAY 18, 2018

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www.txamfoundation.com/WWW2018



WORLDS APART:

English and Engineering

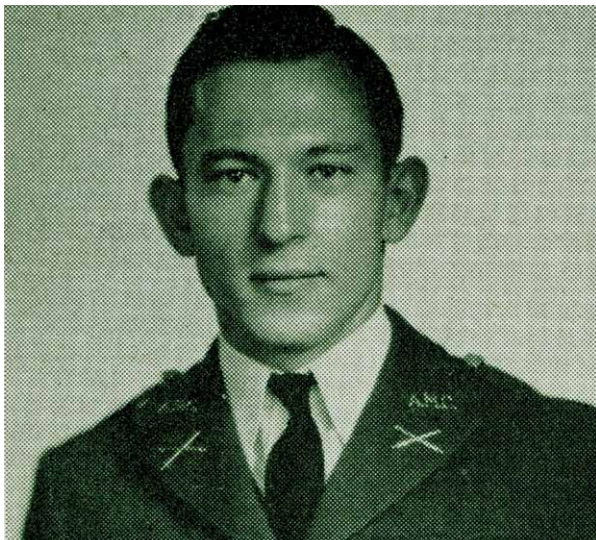
Scholarship funds created by C.C. Burton '42 assist students in the Department of English and the Department of Mechanical Engineering at Texas A&M University. **By Ashley Wagner '18**

The late C.C. Burton '42 and his wife Lou saw the value in both English and engineering. One subject is built upon a long tradition of study in literature and language, writing and reading, and culture and interpretation; the other upon research, innovation, evaluating evidence and finding solutions.

The Burtons created a bequest in their wills to establish two scholarship funds for Texas A&M students pursuing degrees in English or mechanical engineering. To make a gift in your will, also called a bequest, an individual

designates a gift be made to the Foundation as part of his or her estate plan. Benefits include the ability to retain assets during your lifetime, lessen the burden of taxes on your family and support Texas A&M University in whatever capacity you choose, whether it be a program, department, faculty member, or student scholarship or organization.

A bequest can be the vehicle for people to make their most transformational gifts. In fact, most planned gifts are 10 times greater than the sum of the donors' lifetime giving.



C.C. Burton '42 was a member of the Corps of Cadets while enrolled at Texas A&M.

The Burtons' gift has assisted students financially since his passing in 2012. Reid Christopher '19 and Meghan Collier '18, the current recipients of the scholarships, credit their college success to the Burtons' generosity.

Without the burden of financial stress, Christopher, a junior mechanical engineering major, has had the opportunity to join organizations, work hard in classes and make memories along the way. He is a member of the American Society of Mechanical Engineers and the Texas A&M University Robotics Team and Leadership Experience. He also conducts undergraduate research in the Biomechanical Environments Laboratory.

"Financial security means I can put more effort into getting good grades and playing an active role in my organizations," he said. "My scholarship helps me focus on the education I came here for."

Like Christopher, Burton pursued a degree in mechanical engineering from Texas A&M. He began working for the Dow Magnesium Corporation, now the Dow Chemical Company, after graduation. In 1944, he joined the United States Navy and proudly served aboard the USS Rogers in the Asiatic Pacific Theatre until 1952. Afterward, he returned to Dow until his retirement in 1984.

After touring the Texas A&M campus during her senior year of high school, Collier knew Aggieland was the place for her. It wasn't until after she had her heart set on being an Aggie that she learned her great-grandfather had also been a student at Texas A&M, but was unable to finish his degree due to financial issues.

"This scholarship will help me be the first Aggie in my family to graduate from Texas A&M, an achievement I think would make my great-grandfather proud," she said. "It has also allowed me to focus on my classes and not the price of tuition, for which I am eternally grateful."

Collier is a university honors and English honors student, as well as the vice-chair of the Memorial Student Center Wiley Lecture Series, which brings internationally renowned speakers to campus to speak on issues of global significance. She is also in the Undergraduate Research Scholars Program and works at the University Writing Center as a writing consultant.

The Burtons' gift has given countless students the confidence and freedom to approach their degrees without worrying about money or tuition, and it will continue to assist students for years to come.

"In my four years here, I've learned how to think critically and creatively and how to communicate clearly through writing and speaking. Above all, I have gained a greater understanding of the power of language. I hope that I can someday give back to students in the way the Burtons have done." - MEGHAN COLLIER '18



"Financial security means I can put more effort into getting good grades and playing an active role in my organizations. My scholarship helps me focus on the education I came here for." - **REID CHRISTOPHER '19**



HOW ENDOWMENTS GROW



Stage 1

An endowment fund is established with a gift from a generous donor. The gift can be from a bequest like the Burtons' or from securities, a charitable gift annuity, or other options.



Stage 2

Through prudent fiscal management by the Texas A&M Foundation, the endowment fund grows and produces investment income.



Stage 3

The principal of the gift is held in perpetuity, while a percentage of the investment income is paid out each year to the designated area. For the Burtons' gift, this dividend provides scholarships for deserving students.

To find out more about creating an endowment that will impact future generations or to learn how you can support a department at Texas A&M through a planned gift, contact:

Angela Throne '03

Office of Gift Planning
athrone@txamfoundation.com
(979) 845-5638

A photograph of an elderly couple, Manzell Leroy "Shafe" Shafer and his wife Nancy, standing in a rustic restaurant. Manzell is wearing a light-colored cowboy hat, a white shirt, and a grey blazer. Nancy is wearing glasses, a white shirt, a maroon vest, and a necklace. The background shows wooden tables, chairs, and framed pictures on the wall.

Rodeo

ROYALTY

Texas agricultural legend Manzell Leroy "Shafe" Shafer '67 and his wife Nancy establish an impactful planned gift for Texas A&M.

By Molly Kulpa '15



For more than 40 years, Leroy “Shafe” Shafer ’67 and his trademark western hat (with a cattleman’s crease) were representative of the entire Houston Rodeo experience—part country, part rock ‘n’ roll and 100 percent Texan.

Shafe, who retired in 2014 from his position as chief operating officer of the Houston Livestock Show & Rodeo, was instrumental in growing the event into the largest livestock show and rodeo in the world and the largest fair, event or festival in North America. He began working for the organization in 1973 as assistant manager for public relations while the show was struggling to grow into the Astrodome after leaving its old home in the Sam Houston Coliseum. Through the course of his tenure, he helped to transform the show into a multiweek entertainment destination that attracts millions of visitors each year.

One of the keys to that growth was bringing in bigger musical acts that were more in tune with the interests of a wide range of audiences—the hottest names in country, rock and pop music. Under his early tenure, he watched a concert lineup of iconic country stars like Merle Haggard and Johnny Cash grow to include mainstream pop acts like Tony Orlando & Dawn, the Jackson 5 and Sonny & Cher.

Aside from his role in researching, analyzing and securing entertainment, vastly improving presentations and promoting ticket sales, Shafe was intimately involved with the rodeo’s scholarship program, a major supporter of Texas youth. The rodeo awarded its first scholarship in 1957 and has since provided nearly 17,000 scholarships of more than \$200 million to Texas students. Currently, more than 2,200 students are on rodeo scholarships, attending more than 80 different Texas colleges and universities.

“History, culture and education are all integral parts of the Houston Livestock Show, as well as values held in high esteem at Texas A&M,” Shafe said. “Nancy and I feel that both organizations provide a huge impact on the state of Texas.”

To that end, the Shafers established a planned gift through the Texas A&M Foundation that will benefit a multitude of areas at Texas A&M University.

SMALL TOWN ROOTS

Shafe grew up in Trent, a small West Texas town. In junior high, he got his first introduction to the Houston Livestock Show by showing heifers and steers through FFA and 4-H.

He attended Texas A&M in the late 1960s with the support of an Opportunity Award Scholarship and later, additional scholarships and fellowships. “I absolutely don’t know where I’d be today if I hadn’t received so much support,” he said. During his time in Aggieland, he was a member of the Corps of Cadets, serving on Corps staff his junior and senior years, as well as a class officer, a Ross Volunteer and editor of the *Agriculturist Magazine*. After graduating with a bachelor’s degree in agricultural journalism in 1967, he earned a master’s degree in technical journalism from Iowa State University.

Nancy grew up just 25 miles away from Shafe, on the opposite side of Taylor County. She also comes from agricultural roots, as her family was well-known in the area for farming and ranching. She attended Hardin-Simmons University in Abilene, Texas, also with the help of scholarships. Her profession as a junior high and high school science teacher opened their eyes to what having a helping hand can mean for students. When they were ready to make their planned gift, the couple referenced their interests to establish giving focus areas.

“We chose to give back to the programs that helped us find success in life.” -SHAFE SHAFER ’67



PLANS FUELED BY PASSION

Their support to the Texas A&M University Press is a nod to Shafe's journalism background. "The internship we are endowing is different from a scholarship. It's a hands-on position for a senior undergraduate at the press that will provide real-world experience in the publishing world," Shafe said. Founded in 1974, the press is the principal publishing arm of the university with a primary mission to select, produce, market and disseminate high-quality scholarly publications.

Highlighting their love of agriculture and communications, Shafe and Nancy will establish two endowed scholarship programs in the Department of Agricultural Leadership, Education and Communications. One endowment will benefit students majoring in agricultural communications, while the other will benefit students in all three of the department's degree curriculums.

The Shafers also decided to establish an endowed scholarship through The Association of Former Students to honor one of Shafe's college roommates, Neal "Clint" Ward '67, an Air Force pilot who was killed

in action during the Vietnam War. "This was the perfect opportunity to memorialize Clint and bring recognition to all Aggies who lost their lives in Vietnam," Shafe added.

In his own service in Vietnam, Shafe served as an Army helicopter pilot where he flew 327 combat sorties. Midway through his Vietnam tour, conflicts between the military and the media prompted the need for select officers experienced with communications and military operations. Shafe took on extra duties serving as a public information liaison and escort pilot to network media correspondents until his tour of duty was over.

As a nod to his military service, the Shafers will establish two additional scholarships: an Aggie Veteran Freedom Scholarship to benefit a deserving student veteran or a veteran's spouse, and a Corps scholarship to support one student throughout their academic career.

Finally, the Shafers chose to create entomology and public health scholarships that tie in with key interests of Nancy's. "I was a biology and science teacher, but



even from a young age, I was interested in insects and gardening. After I retired, I continued that passion through the Fort Bend County Master Gardeners,” she said. A program administered through the Texas A&M AgriLife Extension Service, Master Gardeners throughout the country work to educate the public about the many aspects of gardening and to inform adults and children about the unique lives of insects and their importance to food production and public health.

“We would encourage all Aggies who are considering planned gifts to look at something like this,” Shafe said. “It gives you the freedom to say, ‘Here’s how we would like our estate to help Texas A&M.’ It’s also fluid in that you can pay some now instead of later. Whether it’s life insurance, IRA distribution rollovers, planned giving or active gifts, there’s a way to help Aggies now and in the future.”

Today, Shafe prefers to stay out of the limelight and focus on his other interests—particularly photography—but he and Nancy feel confident in their planned gift and content to have their legacy at Texas A&M established. You could say it’s their last rodeo.



You Can Support Your Passions Through a Planned Gift

The Shafers created a multifaceted planned gift through the Texas A&M Foundation to establish:

- An editorial internship position at the Texas A&M University Press
- A memorial scholarship through The Association of Former Students
- An enrichment endowment for the College of Agriculture and Life Sciences
- Endowed scholarships to benefit the following areas:
 - Department of Agricultural Leadership, Education and Communications
 - Department of Entomology
 - The Texas A&M Health Science Center School of Public Health
 - Veteran Resource & Support Center
 - Corps of Cadets

Since retiring, Shafe spends more time pursuing his passion for photography.

Finding the

ROOT OF JOY

Poet, speaker and photographer Karla K. Morton '86 will bring messages of hope and inspiration to the 2018 Women, Wealth & Wisdom Workshop. **By Ashley Wagner '18**



Karla K. Morton '86 can easily be described as an "Aggie of all trades." Since graduating with a journalism degree from Texas A&M University, she created a career for herself that showcases her many talents and passions—storytelling, poetry and photography—while traveling across Texas to share what she loves.

The Fort Worth native is one of the more adventurous voices in American poetry, and the awards and accolades she's collected over the years speak for themselves: the 2010 Texas Poet Laureate, a Betsy Colquitt Award and a nomination for the National Cowgirl Hall of Fame, as well as membership in the Texas Institute of Letters.

As part of a new project, Morton is visiting more than 50 of the U.S. National Parks with 2005 Texas Poet Laureate Alan Birkelbach. The pair launched a joint three-year project in 2016 to celebrate the National Park System's centennial and help preserve the parks for the next 100 years. Titled "Words of Preservation: A Poets Laureate National Parks Tour," the project has traveled to Colorado, California, Florida, Arkansas, South Dakota, Alaska, Maine, Ohio and Tennessee since beginning in Yellowstone National Park. While speaking at locations that range from universities to bookstores, the pair hope to document their journey and fill one or more books with their poetry and photography inspired by the parks.

During her whirlwind road trip across the United States, Morton plans to add at least one extra stop in College Station to speak at the *Women, Wealth & Wisdom* event hosted by the Texas A&M Foundation's Office of Gift Planning on May 18. The free financial planning workshop offers informative and inspirational breakout

sessions led by women ranging from financial advisers to cancer survivors to motivate and encourage women in various aspects of their lives.

At its core, Morton's mission is to inspire. She speaks on the value of female friendship and the importance of supporting loved ones in their pursuits, while also encouraging listeners to discover their own happiness. "Women are the caregivers of this world, both in and outside of the home," she said. "We tend to put others first and neglect to nourish our own spirit. I hope my messages reach below the surface and touch peoples' cores. That is where life is truly lived and where the root of joy begins."

For Morton, returning to Aggieland symbolizes how much she's accomplished since receiving her diploma more than 20 years ago. She proudly wears her Aggie ring on her pinky finger—placed directly next to her wedding band—as a bright, shining reminder of what it means to be an Aggie.

"I wear my Aggie ring every day. Its gold holds a reminder of who we are and where we come from. It reminds me to bring integrity and honor into our everyday lives." - KARLA K. MORTON '86

The 2018 Women, Wealth & Wisdom workshop takes place May 18 at the Brazos County Expo Center. Because breakfast and lunch will be served, registration is required for this free event. To hear about other speakers like Karla K. Morton '86 or to find more information and register, please visit www.txamfoundation.com/www2018.





New Year NEW OPPORTUNITIES

With the new year came the implementation of new tax laws, passed by Congress just before January 2018. While most changes are seen in the tax brackets and rates, the Tax Cuts and Jobs Act (TCJA) presents special opportunities for individuals to participate in charitable giving while also benefiting themselves and their families.

GIVING OPPORTUNITIES

RETIREMENT ACCOUNTS

We all want security for the future, which is why we are told to plan for retirement. Most of us hold retirement savings in assets such as IRAs, 401(k)s, 403(b)s and pensions. If you are like many people, you've held these assets for a long time and have seen them grow over time. In fact, according to the Investment Company Institute, total U.S. retirement assets were \$27.2 trillion as of Sept. 30, 2017.

Because of the way these funds are distributed, you aren't likely to use all of your retirement money during your lifetime. The question for many individuals then becomes, "What will I do with my unspent retirement savings?"

Giving unspent retirement savings to your family (other than your surviving spouse) means those assets will be heavily taxed. The better solution is to give your assets, such as stock and real estate, to your family. Retirement assets make for a better gift to the Foundation as we receive the entire asset tax-free and use the full amount to support an area of your choosing at Texas A&M.

► RETIREMENT ACCOUNT BENEFICIARY GIFTS

Making a beneficiary gift of retirement assets is perhaps one of the easiest ways to give to the Foundation and make an impact at Texas A&M. Simply contact your custodian to complete a beneficiary designation form. When you change your beneficiary designation, contact the Foundation so that we can detail how you want the fund to be used in the future.

► IRA CHARITABLE ROLLOVER

More than 8,000 baby boomers are passing the age of 70 every day. With age also comes the ability to distribute up to \$100,000 per year from your individual retirement account directly to charity. Your gift to charity will be excluded from gross income and count toward your required minimum distribution.

The IRA charitable rollover gift is beneficial to all individuals, regardless of their choice to itemize taxes or not. This gift can help you fulfill your required minimum distribution, and it is not considered taxable income. An IRA charitable rollover gift can be used to establish scholarships, create endowed funds for programs, satisfy an extended pledge or be used in conjunction with matching gift money.

Creating Opportunities TO IMPROVE

Every year ushers in new changes. Some are personal, some professional, but all are meant to better ourselves, strengthen our abilities and ultimately, set our sights on the people we want to be. I know my team at the Texas A&M Foundation has begun this year with our sights set on promoting our *Lead by Example* campaign and improving our educational system, our society and the future of our country. We want Aggies to experience great opportunities and make great impacts in the communities they serve.

In December 2017, a new tax law was passed that changes the shape and makeup of our previous tax system. With these changes, we believe there are opportunities to be had for charitable giving and supporting our university and generations of Aggies to come. Our Office of Gift Planning can help you give effectively and decide how best to leave your legacy at Texas A&M, either through a fund created now or through a gift left in your estate plan.

Through my discussions with donors, I've learned that the best gift is as unique as the giver. Each person who reaches out to us about making a gift has their own story and their own idea on how to support our university. Let us help you design a gift that perfectly matches your financial needs and satisfies your after-lifetime wishes. Gifts made by C.C. Burton '42 and Nancy and Leroy "Shafe" Shafer '67 in this volume of Spirit of Sharing uniquely reflect their stories, and the scholarships they created articulate their ideas for a better future.

As we continue the new year, we have our sights set on the future and ways to further the advancement of our beloved university. Let us help you set your sights on your legacy at Texas A&M and start creating an impact today.

Thanks for all you do.

Tyson Voelkel '96

President, Texas A&M Foundation

FIVE WAYS TO MAKE AN IMPACT



RETIREMENT
ACCOUNT
BENEFICIARY
GIFTS



IRA
CHARITABLE
ROLLOVER



APPRECIATED
REAL ESTATE



APPRECIATED
SECURITIES



CHARITABLE
REMAINDER
TRUST

THINKING BEYOND CASH

► APPRECIATED REAL ESTATE

Like appreciated securities, appreciated property real estate may be subject to capital gains taxes unless donated to charity. Rental or vacation properties are a great type of real estate to give. By leaving your real estate to the Foundation, you can avoid the maintenance upkeep, forego the burden of property ownership and make an impact at Texas A&M.

► APPRECIATED SECURITIES

The 2018 tax changes are expected to significantly decrease the number of individuals utilizing charitable deductions on their income taxes. However, the capital gains tax rate remains intact, which can result in a positive economic opportunity for you and your family. When you give appreciated securities (stocks, bonds, mutual funds, etc.) to the Texas A&M Foundation, you can avoid capital gains taxes.

In addition, the stock market continues to trade at record levels, and the opportunity to give appreciated stock is more beneficial than ever. Instead of reaching for your checkbook when making a gift, look to your investment portfolio to see where you can reap some tax savings.

CHARITABLE REMAINDER TRUST

Charitable remainder trusts are another great vehicle that can be funded with appreciated securities or appreciated real estate. You will receive the same tax benefits and a secure source of income. When using real estate to fund a charitable remainder trust, you avoid the hassle of selling your property while creating a legacy.

Changes in our tax system shouldn't deter you from supporting those special to you—family members and organizations alike; in fact, these changes may even encourage you to research the unique ways you can make a planned gift and support both after your lifetime. There are many ways you can support the future of Texas A&M without giving cash or writing a check today. Consider making a gift that will save your heirs the stress and financial worries of taxes, as well as contribute to the future of Texas A&M.

**WANT TO LEARN MORE ABOUT GIVING
OPPORTUNITIES TO TEXAS A&M?**

Request your free estate and gift planning kit using the card at the back to learn about various giving options in detail.