

SUMMER 2025

A TEXAS A&M FOUNDATION PUBLICATION

Heritage



Real **ESTATE** SOLUTIONS



Turning Property Into Possibility

ILLUSTRATION RIGHT, PAGE 2 & PAGE 13 BY RED DOODLE CREATIVE

What if the house you made a home could one day build a brighter future for Texas A&M University? Similarly, imagine if that commercial property you've held onto for years could be the cornerstone for Aggieland's next new initiative, or if your family's land could create a lasting legacy that impacts generations.

What if I told you the Texas A&M Foundation is fully equipped to not only make any of these scenarios possible but also easy?

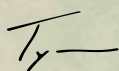
Enter the Foundation's real estate services team—our in-house experts dedicated to helping our donors solve ownership challenges while finding meaningful ways to reach their philanthropic goals through gifts of property. As we showcase in this issue, the Foundation is uniquely set apart from many peer organizations in the realm of real estate, demonstrating a level of sophistication for navigating these gifts and transforming what may seem like a daunting transaction into an opportunity for growth, sustainability and lasting impact. It's one of the many intentional ways we foster forward-thinking fundraising and stay aligned with our vision to be among the most trusted philanthropies in higher education.

For decades, our team has witnessed the value this service brings to our donors in providing the most gratifying experience the industry has to offer in terms of accepting and managing gifts of real estate—no matter how technical or elaborate they may be. In fact, the Foundation has the expert ability to accept multiple types of properties for the benefit of Texas A&M, including both surface and mineral estates.

This means the Foundation not only manages donations of land, homes and buildings but can also leverage what's beneath ground level, such as mineral rights or royalties including oil, gas, coal, water and metals. No matter your property, our team can transform your asset into a gift that supports any aspect of Aggieland you desire. Whether it's an endowed scholarship to honor a loved one or support that impacts your favorite college program, your contribution can be entirely customizable to best serve you and the causes you care about most.

As this issue illustrates, having a dedicated real estate team is a rare and empowering benefit that allows the Foundation to amplify your generosity, turn assets into action and ultimately make a bigger difference for Aggies to influence our state, nation and world. When it comes to the range of opportunity, these methods leave the door wide open—reaffirming that our real estate services aren't simply a luxury but a game changer for our mission, our donors and the future of our beloved university.

Thanks for all you do.



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





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**LEAD BY
EXAMPLE**

A GIFT FOR YOUR GOALS



		YOUR GOAL
AFTER LIFETIME	BEQUEST IN LIVING TRUST	Give after your lifetime and avoid probate.
	BEQUEST IN WILL	Give after your lifetime.
	TRANSFER ON DEATH DEED (TODD)	Give after your lifetime and avoid probate.
CURRENT	OUTRIGHT GIFT	Make a current gift and maximize the charitable income tax deduction.
DUAL BENEFIT	CHARITABLE REMAINDER UNITRUST	Secure significant payments and create a hedge against inflation.
	RETAINED LIFE ESTATE	Give your personal residence, farm or ranch now but continue using your property.

FROM MORE COMMON TYPES OF PROPERTIES LIKE HOMES AND RANCHES TO LESSER-THOUGHT-OF GEMS LIKE MINERAL RIGHTS, YOU CAN EXPERIENCE SIGNIFICANT BENEFITS IN DONATING REAL ESTATE TO THE TEXAS A&M FOUNDATION. BUT **HOW** YOU CHOOSE TO DONATE IS JUST AS IMPORTANT AS **WHAT** YOU CHOOSE TO GIFT.

With a combined **62 years** of experience, our real estate experts have seen and done it all and are well equipped to help you tailor a plan that best achieves your goals. Start by browsing the chart below to quickly identify what method of giving might fit your unique needs. When you're ready to dig into the details, our team will be standing by to guide you through a rewarding experience that will ultimately benefit your passions in Aggieland. Whoop!

HOW TO MAKE YOUR GIFT

YOUR BENEFITS

Name the Texas A&M Foundation as a beneficiary in your living trust.	• Revocable • Lifelong control and protection of assets	• No probate • Privacy • Reduced estate tax liability
Name the Texas A&M Foundation as a beneficiary in your will.	• Revocable • Lifelong control of assets	• Easily created • Reduced estate tax liability
Sign and record the TODD naming the Texas A&M Foundation as the owner upon your death.	• Revocable • Lifelong control of assets	• No probate • Reduced estate tax liability
Deed your property to the Texas A&M Foundation.	• Your gift impacts Texas A&M during your life • Property ownership burdens removed	• Immediate charitable income tax deduction • Capital gains taxes bypassed
Create a trust that generates payments; the remainder benefits Texas A&M.	• Payments for life • Property ownership burdens removed	• Immediate charitable income tax deduction • No up-front capital gains taxes
Deed your property to the Texas A&M Foundation but retain occupancy and use.	• Lifetime use of residence or farm/ranch • Immediate charitable income tax deduction	• No probate • Capital gains taxes bypassed • Reduced estate tax liability

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Get the Guided Tour

Simplify your navigation efforts with our experts' tried-and-true real estate gifting plan. It's the quickest and most rewarding route to Aggieland!

ILLUSTRATION RIGHT & COVER
BY BRAVE THE WOODS



AGGIELAND'S

Real Estate ROADMAP



Your real estate adventure awaits!

Join us for a road trip across Texas (and beyond) as we learn true stories of how Aggies and friends of Texas A&M University are gifting property of all types to solve unique challenges and pay it forward for a brighter Aggieland.

AFTER-LIFETIME GIFTS

LOOKING FOR A STRESS-FREE WAY TO GIVE BACK TO AGGIELAND? YOU CAN EASILY TRANSFER YOUR PROPERTY BY NAMING THE TEXAS A&M FOUNDATION AS THE BENEFICIARY IN YOUR WILL OR LIVING TRUST OR THROUGH A TRANSFER ON DEATH DEED. THIS ROUTE PROVIDES FLEXIBILITY BECAUSE THESE DOCUMENTS CAN BE CHANGED AT ANY TIME, REDUCES YOUR ESTATE TAX LIABILITY BY REMOVING THE PROPERTY FROM YOUR ESTATE, AND ALLOWS YOU TO CONTINUE OWNING AND ENJOYING YOUR PROPERTY DURING YOUR LIFE.

For years, Dr. Linda Talley's psychology expertise took her around the world to places like Hong Kong, where she spent weeks coaching executives on the nuances of nonverbal communication and cross-cultural collaboration. But at home, Talley is rarely without the company of her rescue dogs, who settled next to her even during our interview. Providing for them has been just as important to her as her consulting business, which is why she arranged for her home to be gifted to the Texas A&M Foundation after her lifetime through a transfer on death deed (TODD). Her gift will support Texas A&M University's Stevenson Companion Animal Life-Care Center, where her dogs and many like them will find refuge after her lifetime. We caught up with Talley—and five of her furry friends—to learn more about her planned gift and passion for the Stevenson Center.

What inspired your estate gift to the Stevenson Center?

I was constantly traveling for work, sometimes gone for weeks at a time. One day, I wondered what would happen if I was in an accident and my dogs were left behind. My dogs are my children, so I didn't want them to end up in a shelter. They're all rescues, and I couldn't bear the thought of them being rescued again or put down, so I began researching places they could live if something catastrophic were to happen. I visited the Stevenson Center and absolutely loved it. It felt like the perfect place for them, and it gave me peace of mind knowing they'd be taken care of.

Q&A

WITH Dr. Linda Talley

INTERVIEW BY HILARY NGUYEN '26 | PHOTO BY TODD SPOTH



How did you connect with the Texas A&M Foundation?

As I was putting together my will, the only thing I hadn't quite figured out was my house. I asked Ellie Greenbaum, the Stevenson Center's associate director, if they accepted real estate gifts, and she directed me to the Texas A&M Foundation. It felt like a natural step. I found a way to ensure my dogs would be cared for while also supporting the center in a meaningful way.

Why did you choose to give through a TODD?

I first learned about TODDs after a friend of mine created one. When I met with the Foundation's Real Estate Services team, I told them I wanted two things: no probate and a deed that I could revoke if needed. My TODD eliminates the need for an executor required for a will or a trustee required for a living trust, so my house will transfer directly to the Foundation once they have my death certificate. I don't want any time-consuming transfer processes hanging over things, and I prefer that the money that would go to lawyers and judges be used to help the center instead. Another reason I chose the TODD was its flexibility. At my age, uncertainty is part of the package. I like that if I decide to sell my house and move to a retirement community, or if I need the funds for something unexpected, I can do that without complication.

What was your experience working with the Real Estate Services team?

They're all wonderful. Everyone is so responsive, no matter who I reach out to. They make my life easier and help me sleep better at night, knowing there's a team ready to step in if I face any issues. I once had a mix-up with the ownership of my house. I called Tim Walton '90, assistant vice president for real estate services, and he straightened everything out within an hour.

That level of support is reassuring. It doesn't feel like I'm stranded on some distant island. There are always ships around ready to help if I need something. I know everything is in place and that it's going where I want it to, thanks to the team.

Why is giving back important to you?

I know I can't take anything with me to the grave, so I want to make sure everything goes to a place where it'll be put to good use. I've been very fortunate in my life, so I try to give back wherever I can. Wills and planned gifts are something I think everyone should consider sooner rather than later. The earlier you plan, the more you can ensure that the people in your life and the causes you care about are cared for.

CURRENT GIFTS

FIND PURPOSE FOR YOUR PROPERTY.
HOLDING ONTO PROPERTY CREATES HEADACHES LIKE INCREASED TAXES AND OWNERSHIP BURDENS, BUT A CURRENT GIFT TO THE TEXAS A&M FOUNDATION COULD SOLVE ALL THESE PROBLEMS AND MORE.

Gifts a property outright that you've held for more than one year:

- Provides you with a charitable income tax deduction equal to the property's fair market value.
- Bypasses capital gains taxes on the property's appreciation.
- Avoids the hassle of selling the property—we do the work for you!
- Eliminates ownership burdens like insurance, property taxes, rent and maintenance.
- Reduces your taxable estate.
- Allows you to experience the impact you're creating on campus while building lasting relationships with current Aggies!



Outright Surface Estate

PATRICIA "PAT" AND DAVID RUBENSTEIN '77

BY JADE WILLIAMS '25 '27 | PHOTO BY JOSH LEWIS '14

As a fish in the Corps of Cadets, Company D-1, David Rubenstein '77 learned four key responses: "yes, sir," "no, sir," "no excuse, sir," and "I don't know, sir." However, when it came to meeting students' needs on campus, whether through funding various scholarships, supporting Hillel Center and Memorial Student Center building reconstruction projects or making an outright real estate gift, there was only one right answer: a resounding "yes!" David credits his successful 35-year Army career to leadership lessons in the Corps. That's why he and his wife, Pat, continue to give back in several ways, including their recent gift of two residential lots overlooking Canyon Lake, Texas.

The Rubensteins created their real estate gift after learning how to support the university beyond writing checks. Concerned about the liability of undeveloped land they no longer needed, they appreciated the immediate charitable income tax deduction and quick, helpful service from the Texas A&M Foundation. They even conveniently signed the papers during a home football weekend.

David shared that his and Pat's overarching goal is to contribute to the long-term impact and success of Aggieland and that gifting their real estate was a beneficial way to do so. "By having the Foundation sell our property, it will eliminate all capital gains taxes to us and allow us to use its full value to benefit future Aggies," he said. "For anyone who has property they no longer want or need and would like to see their asset used to advance Texas A&M, this is a convenient and selfless way to do it."

Outright Mineral Estate

DIANE AND JOHN SANDLIN '66

BY TYLIE MCDONALD '27 | PHOTO BY JOSH HUSKIN

As John Sandlin '66 looked to the future, he had a decision to make about his family's mineral interests. Originally acquired in the 1930s and '40s, the assets had been passed down through generations. Sandlin took over management in 2005 and officially acquired them in 2011. They had provided steady income, but at 80 years old, what would he do with them?

Selling wasn't a good option because of Sandlin's low cost-basis which would trigger significant capital gains taxes, not to mention having to navigate a complicated sales process. "My wife and son were reluctant to take over management of the mineral interests, and disposing of them through my estate would be complicated and costly for my executor," Sandlin explained.

Sandlin had already established the Shirley S. and Fred C. Sandlin '40 Engineering Scholarship at Texas A&M University, a tribute to his family's deep Aggie engineering roots. As he considered solutions for the mineral interests, a thought struck him: Could he donate them to the Texas A&M Foundation? After a conversation with the Foundation's real estate team, he learned that the Foundation not only accepted them but would also manage and retain the interests, using the royalties to expand his existing scholarship. Additionally, donating oil and gas interests to the Foundation would qualify him for a charitable income tax deduction equal to the asset's value based on a qualified appraisal.

With his family's support, Sandlin transferred the interests, ensuring their value would keep growing, benefiting Aggie engineers and honoring his family's legacy.

"DONATING MINERAL INTERESTS TO THE FOUNDATION IS A GREAT WAY TO UTILIZE TEXAS OIL AND GAS PROFITS FOR A TRULY VALUABLE PURPOSE AS WELL AS A WAY OF 'KEEPING IT IN THE FAMILY.'"

JOHN SANDLIN '66



This Scholarship Fueled My Dreams

Joshua Ficarro '17, a former recipient of the Sandlins' engineering scholarship, shares his journey as an Aggie and civil engineer.

My time in Aggieland...

Ignited my passion for lifelong learning and international travel. Studying abroad was life-changing—it introduced me to the beauty of experiencing different cultures. Most importantly, the Aggie Spirit instilled in me the values of community, work ethic and appreciation.

The Sandlin Scholarship...

Allowed me to prioritize academics and personal growth. Coming from a low-income household with little support, transitioning to a large university was challenging. This scholarship, along with mentors and friends, helped me succeed without the financial burden of higher education.

Today...

I'm a project manager at Pape-Dawson Engineers, working alongside fellow Class of 2017 graduates. The generosity I received at Texas A&M continues to inspire me to help others. I've grown as a leader while giving back through ACE Mentoring, my company's volunteer council and local school programs.

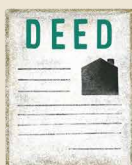
DUAL-BENEFIT GIFTS

SEEKING AN UNCONVENTIONAL GIVING METHOD WITH MAJOR BENEFITS? FROM LIFETIME PROPERTY ENJOYMENT TO LIFETIME PAYMENTS, AGGIES ARE WHOOPING FOR GIVING METHODS LIKE RETAINED LIFE ESTATES AND CHARITABLE REMAINDER UNITRUSTS.

While very different methods, retained life estates and charitable remainder unitrusts (CRUTs) offer mutually beneficial ways to impact Aggieland for generations to come. In a retained life estate, you deed your property to the Foundation now but continue enjoying it during your lifetime. With a CRUT, you use your property to create a trust that will pay you or named beneficiaries for life (or a term of years), making it ideal for retirement income and/or a way to pass wealth to the next generation. Learn more about the unique characteristics of these methods below.

RETAINED LIFE ESTATE *A Gift You Can Call Home*

- 1 Deed your home/property to the Texas A&M Foundation.



- 2 Receive an immediate charitable income tax deduction and remove the asset from your estate.



- 3 Enjoy your property and any income generated, including rent, for life. (You are responsible for maintenance, insurance and taxes.)



- 4 After your lifetime, the Foundation sells your property, and your legacy comes to life in Aggieland.



CHARITABLE REMAINDER UNITRUST: *Property That Pays You*

- 1 Transfer your unmortgaged property to your CRUT and name the Texas A&M Foundation as trustee. You receive an immediate charitable income tax deduction.

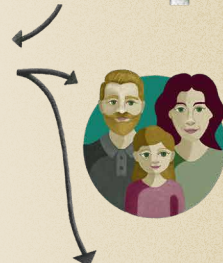


GIG'EM!

- 2 The Foundation sells your property and invests the proceeds. You bypass all capital gains taxes at the time of sale.



- 3 Invested proceeds provide you or named recipients with payments for life (or a term of years).



- 4 After the trust ends, remaining funds benefit your Aggie passions.

GIG'EM!

Retained Life Estate

DRS. EHRIKKA HODGE MESSER '94 AND IVAN MESSER '86 '87 '94

BY JADE WILLIAMS '25 '27 | PHOTO BY JOHN DAVIDSON

Drs. Ehrikka Hodge Messer '94 and Ivan Messer '86 '87 '94 grew up in families who taught them the value of education and community. Today, the couple has found a unique and flexible way to honor their loved ones while supporting students at Texas A&M University by gifting their Elgin, Texas, farm through a retained life estate.

"My grandmother grew up in a time when it wasn't very popular for African Americans to attend college, so she wanted her children and grandchildren to have that opportunity," Ehrikka smiled. "She said if I got my master's in education, she would help pay for it."

With a medical career in mind, Ehrikka earned her bachelor's in biomedical sciences before taking a teaching position close to home—a job that uncovered her passion for educating others and ultimately led to her master's and doctoral degrees in education. In her successful 22-year career in public education, she was a special education teacher, an assistant principal, a principal and a director of special education. She currently serves as the director of human resources and operations for CASA of Travis County, a child advocacy program.

Ivan has also enjoyed educating and serving the public in his 30-year career with the State of Texas. Beyond public education, the couple shares a passion for Texas A&M, their family farm and their beloved miniature donkeys. Working with the Texas A&M Foundation's team, they combined their favorite things in one meaningful and convenient gift.

"Knowing that Ivan and I have no siblings and there's no one else after we're gone, we considered how we could maintain the legacy of education our families instilled in us," Ehrikka explained. The Foundation's real estate team presented the perfect solution: a retained life estate gift. "With the retained life estate, we can enjoy the land we love for our lifetime, receive a charitable tax deduction, and then use it to help future Aggies."

After Ehrikka's and Ivan's lives, the Foundation will sell their agricultural property and use the proceeds to create endowments that will fund perpetual support for areas they chose: the Aggie ACHIEVE

program in the College of Education and Human Development and Texas A&M's Linda and Dennis Clark '68 Small Animal Teaching Hospital. Two of their future endowments are named in memory of their loved ones who were proponents of education and paying it forward. "Helping others is what we are supposed to do," Ivan shared. "I've had help earning my degrees and finding jobs that have enabled my success. Now, it's our turn to help."

"KNOWING THAT IVAN AND I HAVE NO SIBLINGS AND THERE'S NO ONE ELSE AFTER WE'RE GONE, WE CONSIDERED HOW WE COULD MAINTAIN THE LEGACY OF EDUCATION OUR FAMILIES INSTILLED IN US."

DR. EHRIKKA HODGE MESSER '94





Charitable Remainder Unitrust

MELANIE AND MARK POOL '77

BY RYAN WILLIAMSON '24 | PHOTO BY TODD SPOTH

Melanie and Mark Pool '77 never expected that their daughter's career in the music business would lead to a significant gift to Texas A&M University. But now, their investment in a Nashville-area townhome is positioned to create future opportunities for Aggies.

Investing in the future isn't new for the Pools. Both held four-decade education careers beginning in Melanie's hometown of Hawkins, Texas—Melanie as a kindergarten teacher and Mark as a high school agricultural science educator. Later, Mark held various administrator and superintendent roles.

Mark credits his prolific career to his experiences and professors at Texas A&M, especially Dr. Herman Brown '53, who convinced him to study agricultural education alongside his animal science degree. "Next to my parents, nothing had a bigger impact on my life than this institution," he reminisced. "My professors pushed me when

I wasn't pushing myself." Though not a former student, Melanie is a proud member of the Aggie family and served as the Wood County Aggie Moms president.

When the Pools' youngest daughter, Megan, set her sights on a career in Music City, they purchased a townhome just south of Nashville, where she lived for nearly 20 years. After her recent move back to Texas, Melanie and Mark were ready to sell the property. However, its value had greatly appreciated. While looking for ways to minimize capital gains taxes, an Aggie friend suggested, "Why don't you consider gifting it to the Texas A&M Foundation?"

They connected with the Foundation's real estate team, who guided them through the giving process as they established a four-life charitable remainder unitrust. In addition to avoiding capital gains taxes, the Pools and their daughters, Megan and

Elizabeth Edmonson '03, will receive annual payments from the trust for their lifetimes. "The process was seamless," Mark shared. "The Foundation took care of everything, and the house was on the market for less than a week."

Upon the trust's termination, the remaining funds will establish two endowed scholarships in agriculture and education. "We chose to create these scholarships because they support our backgrounds," Melanie explained. "There were plenty of options, but we wanted it to go directly to students."

Now residing in El Campo, Texas, the Pools encourage others to also include Texas A&M in their estate plans. "We've always wanted to give back to this university in a substantial way," Mark said, "and the charitable remainder unitrust was the way that worked for us."

YOUR GUIDED REAL ESTATE ROUTE

Whether a map or GPS, most people don't embark on a journey without proper navigation. Similarly, we wouldn't expect you to travel the real estate gift road alone. Our real estate professionals are experts who have navigated various routes to help donors in their quest to solve unique property challenges. Below are the major "pitstops" our team will guide you through to keep you fueled up as you drive toward a meaningful gift for Aggieland.



Ready to plan your real estate adventure?
Contact our real estate services team at 979.845.8161
or realestateservices@txamfoundation.com.



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AGGIE PERSPECTIVES

Donors Speak: Real Stories About Real Estate

Did this special Heritage issue featuring real estate gifts inspire you to leave your own legacy in Aggieland? Scan the QR code to watch four videos highlighting former students and friends of Texas A&M University who used real estate to benefit their passion areas on campus.

Offering real-life perspectives on various giving methods, these stories share each donor's step-by-step process of working with our team to transform their unique property challenges into an investment in future generations of Aggies. Watch now to discover ways you could grow Aggieland's future with your property.

SCAN TO WATCH THE VIDEOS ►



REAL ESTATE DONORS MISSY AND SCOOTER HALAMICEK SHARE THEIR STORY.



GOT MINERAL INTERESTS?

Scan here to learn how a term royalty deed can work for you and Aggieland.



Detach here, fold, tape and drop in mail

Howdy! How can we serve you?

Whether you own assets above the ground or under it, there are significant benefits for you and Aggieland when you team up with our real estate experts. As you thumbed through this issue of Heritage, you may have noticed that gifts of property are very customized. There's a lot that's not covered in these pages, so we encourage you to reach out to our team for a friendly conversation to explore your goals and the real estate tools we have that can help you achieve them. Our team's goal? To turn what might be a complex real estate challenge into a rewarding—and even enjoyable—journey for you. Contact us to get started!

To reply online, please visit give.am/HeritageReply.

- ☐ I'm interested in gifting property to the Foundation. Please contact me to discuss my options.
- ☐ I have included a gift of real estate to 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.
- ☐ I'm not considering a real estate gift, but I am interested in giving back with another asset after my lifetime. Please email / mail (circle one) me your estate planning resource, "**Aggieland's Ultimate Estate Planning Kit**," with more information about creating a planned gift.
- ☐ My contact information has changed, but I have updated it below.

Name (please print) _____

Address _____

City, State, Zip _____

Telephone _____

Email Address _____

Comments/Special Request _____