A gift from Connie and Roy Kendall’s estate brings thousands of moths and butterflies to Texas A&M University, making it home to the largest collection of Lepidoptera in the Southwestern United States.
Nicole Bertolini ’18 has always loved animals. Now she’s on her way to becoming an Aggie veterinarian. The task ahead of her requires a lifetime of service, but she’s armed with passion, empathy and knowledge—a long with her white coat. She received the new addition to her closet cost-free, thanks to Dr. Jeanne Fairweather leaving a gift in her will. Donning it every day, she is reminded of what it symbolizes: strength, integrity and the will to save lives. When we match students like Nicole with people who invest in the future, we see students fulfill their dreams.

*By tailoring a gift to your unique needs and interests, you can leave a legacy that will support hardworking students like Nicole for generations to come. We invite you to learn more by visiting txamfoundation.com/plan.*
Nicole Bertolini ’18 has always loved animals. Now she’s on her way to becoming an Aggie veterinarian. The task ahead of her requires a lifetime of service, but she’s armed with passion, empathy and knowledge—along with her white coat. She received the new addition to her closet cost-free, thanks to Dr. Jeanne Fairweather leaving a gift in her will. Donning it every day, she is reminded of what it symbolizes: strength, integrity and the will to save lives. When we match students like Nicole with people who invest in the future, we see students fulfill their dreams.

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Connie and Roy Kendall spent most of their lives collecting and documenting information on moths and butterflies from around the world. Roy’s research centered on Lepidoptera, insects with four large-scale covered wings, distinctive markings and caterpillar-like larvae, in the Texas and Northern Mexico regions.

Before his passing in 2008, Roy donated his entire collection to Texas A&M University through a bequest in his will, along with $1 million through the Texas A&M Foundation to sustain the collection.

A self-taught lepidopterist, Roy possessed the largest collection of Lepidoptera specimens in the Southwestern United States. His collection was accompanied by more than 25,000 pages of laboratory and field notes and numerous copies of published scholarly papers, both of which documented more than 500 different butterfly and moth species and included the discovery of new kinds of Lepidoptera.

Roy’s collection was added to the Texas A&M University Insect Collection, which began more than 100 years ago when the Department of Entomology was formed. Today, it’s home to more than 2.9 million curated specimens from Texas and around the world—some dating back to the late 1800s. The collection is used for educational and research purposes for undergraduate, graduate and faculty scholars. It has been recognized as one of the top 10 university-based collections in the nation, and it is the largest entomological research collection in Texas.

Ed Riley, Texas A&M research specialist, has spent more than 29 years tending to these species, first as assistant curator and later as associate curator. He officially retired in August 2015, but still assists the collection part-time. “Roy Kendall was more than a collector,” Riley said. “He was an extremely dedicated amateur lepidopterist with a real passion for research aimed at understanding the whole life history of this species. His collection was assembled over many years of study, and his efforts have long been recognized as outstanding and important contributions by his peers.”

It was a 16-year process to transfer every piece of Roy’s work to the university’s insect collection. The Kendalls’ gift promotes the importance of Texas’ natural resources and the need to conserve its biodiversity.
“The Texas A&M Insect Collection affords many opportunities for students to gain exposure to the research and maintenance activities of a large active collection.”

- ED RILEY

The collection also serves as a scientific base for the future study of Texas moths and butterflies. Just recently, DNA extracted from some of the Kendall specimens was used in a study that demonstrated the existence of a previously unrecognized Texas butterfly species.

“There have been numerous uses of the Kendall collection through loans and visitations by students and specialists,” Riley said. “We don’t know all the future uses of the collection just yet, but some students have worked directly on our Lepidoptera collections, mostly by preparing additional specimens and participating in local Lepidoptera surveys.”

The bequest in Connie and Roy’s wills ensured that Texas A&M would preserve Roy’s treasured collection after both of their lifetimes. To make 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 in whatever capacity you choose, whether it be a program, department, faculty member, or student scholarship or organization.

“The Texas A&M Insect Collection affords many opportunities for students to gain exposure to the research and maintenance activities of a large active collection,” Riley said. “The fact that Roy’s lifelong work is conserved at a public institution will ensure access to the specimens and data for current and future generations of those interested in the study of Lepidoptera.”

Roy’s legacy sits on the second floor of the Minnie Bell Heep Building on Texas A&M’s West Campus and continues to benefit, entertain and fascinate bug lovers who visit Aggieland.

To learn how a bequest can benefit you, your family and the university, contact:

**Angela Throne ’03**

*Office of Gift Planning*

athrone@txamfoundation.com or (979) 845-5638
Never Stop LEARNING

LYNN AND RICHARD BOX ’61 CREATE A CHARITABLE REMAINDER UNITRUST TO SUPPORT FUTURE AGGIES.

BY KARA BOUNDS SOCOL
When Dr. Richard Box ’61 walked into The Flower Bucket in Austin, he intended to purchase a bouquet for his mother. By the time he left the shop, he had not only obtained flowers, but a date with the store’s owner—a young widow who would eventually become his wife. Richard and Lynn Box married in 1985. Since that day, the Aggie and the Longhorn have put school rivalries aside to instead focus on their common passion: education. Most recently, pursuing that passion has come in the form of a planned gift to the Texas A&M Foundation.

“We both have strong backgrounds in education and school teaching, and are well-aware of the role learning continues to play in our lives,” Richard said. Supporting Texas A&M University financially, he explained, is a way they can spread educational opportunities to others long after he and Lynn are gone. When Richard retired in June, the couple followed through on plans to convert proceeds from the sale of his dental practice into support for Texas A&M. Richard has lived a full Aggie life. While a zoology undergraduate, he was a member of the Aggie tennis team and the Corps of Cadets’ 2nd Brigade staff. He served as an Army dentist during the Vietnam War, and, decades later, helped form a medical company for the Texas State Guard. Richard eventually became Texas State Guard commander, overseeing the Guard during the state’s response to Hurricanes Katrina and Rita, before retiring as a major general in 2006.

In 2008, he joined The Texas A&M University System Board of Regents. He remained on the board until 2013, serving as chairman during the last two years of his tenure. In April, he was inducted into the Corps of Cadets Hall of Honor.

However, they also wanted to ensure that they would have the necessary personal funds available to fully enjoy this new chapter of their lives. After visiting with Foundation staff members Glenn Pittsford ’72 and Tim Walton ’90, the Boxes decided that a charitable remainder unitrust would best meet both goals. Richard has lived a full Aggie life. While a zoology undergraduate, he was a member of the Aggie tennis team and the Corps of Cadets’ 2nd Brigade staff. He served as an Army dentist during the Vietnam War, and, decades later, helped form a medical company for the Texas State Guard. Richard eventually became Texas State Guard commander, overseeing the Guard during the state’s response to Hurricanes Katrina and Rita, before retiring as a major general in 2006.

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Supporting educational endeavors comes naturally to the Boxes. Richard’s parents were both South Texas school teachers, while Lynn’s father taught at Texas Tech University. Lynn pursued an education degree at The University of Texas (UT) at Austin, later teaching junior high and high school English.

Even after exiting the education field to open her flower shop, Lynn couldn’t stay away. After leaving the floral business, she took a job first in the UT chancellor’s office, then in the university’s Osher Lifelong Learning Institute, which provides educational opportunities for those aged 50 and over. These days, she can be found volunteering at Austin’s Settlement Home for Children, working with teenage girls who have endured abuse and neglect.

“I think it’s vital to one’s overall mental, physical and spiritual well-being to never, ever stop learning.” —LYNN BOX

Bolstered by the financial security that comes with a charitable remainder unitrust, the Boxes not only celebrated Richard’s retirement this summer with the Texas A&M Foundation gift, but also with a trans-Atlantic cruise on the Queen Mary II. The cruise was educational—of course—featuring a group of World War II survivors who gave talks about their experiences.
Imagine this scenario: You’ve saved money all your life, watched your wealth and investments grow, and now high taxes threaten to jeopardize your savings. As you think about how to manage your estate, increase your income during your retirement years and protect your financial future, think about a charitable remainder unitrust and whether it may be the right tool for you.

A charitable remainder unitrust can help you avoid higher taxes while providing additional benefits. When you fund a charitable remainder unitrust with an appreciated asset like stock or real estate, no capital gains taxes are due at the time of the sale. You and others you designate then receive payments from the trust for a specified number of years or for life. The charitable reminder unitrust also entitles you to a charitable income tax deduction. The remainder of the trust assets will go to the Texas A&M Foundation to benefit the Texas A&M University area of your choosing: students, faculty, colleges or programs.
HOW A CHARITABLE REMAINDER UNITRUST WORKS:

1. You transfer cash, real estate or securities into a charitable trust.

2. The trust pays a percentage of the value of its principal to you and/or the beneficiaries you designate. The trust principal is revalued annually.

3. When the trust terminates, the remainder passes to the Texas A&M Foundation to be used for Texas A&M University as you specify.

WHAT ARE YOUR BENEFITS?

- You receive an immediate income tax deduction for a portion of your contribution to the unitrust.
- You pay no immediate capital gains taxes on the transfer and/or sale of appreciated assets.
- You and/or your beneficiaries receive payments for life or a term of years.
- You can make additional contributions to the trust as your circumstances allow and qualify for additional tax deductions.
- You can convert low-yielding, highly-appreciated assets into a higher-yielding, diversified portfolio.
- In the case of real estate, you avoid the burden of selling your property.
- You have the satisfaction of making a significant gift that benefits you now and Texas A&M later.

TO LEARN MORE, FILL OUT OUR REPLY CARD AT THE BACK OF THIS ISSUE. WE WILL SEND YOU A COMPLIMENTARY CHARITABLE UNITRUST KIT THAT INCLUDES A PERSONALIZED GRAPHIC CHART ILLUSTRATING HOW A UNITRUST CAN WORK FOR YOU.
The Office of Gift Planning at the Texas A&M Foundation works with passionate individuals who wish to leave a legacy at Texas A&M University. Gift methods and size options range from person to person, but no matter the size, each gift signifies a commitment that will always be felt in Aggieland.

Heritage membership in the A&M Legacy Society is the Foundation’s way of celebrating and honoring those who have included Texas A&M in their estate plans. Members receive an invitation to annual appreciation events as well as recognition in Legacy Hall at the Jon L. Hagler Center and on the Foundation’s website.

To become a Heritage Member, an individual names the Foundation as the beneficiary of a planned gift of any size. A wide range of planned gift options are available, including bequests, trusts, life insurance gifts or charitable gift annuities, allowing you to tailor a gift to your unique financial needs and support your specific interests at Texas A&M.

Committed to

GIVING

Heritage Membership celebrates and honors those who have included a gift for Texas A&M in their estate plans.

William D. Allison ’44
Houston
Charles P. Amrock, II ’75
Midland
Christopher A. Andrews ’79 & Anna Maria Andrews
Aurora, CO
Cynthia ’82 & Fred Balda ’82
Dallas
Jan & Bruce Bayless
Richardson
Lynn & Richard Box ’61
Austin
Khashallah Byne
DeSoto
Dianne R. & A. Benton Cocanougher
Bryan
Steven L. Cowart ’86
Houston
Joann Meyer Cox ’76 & Joseph L. Cox, Jr.
Todai, NC
Kristen L. Cox ’83
College Station
Kyle D. Cox ’18
College Station
Cynthia D. ’87 & David O. Craig ’86
Klein
V. Glenda & Jan H. Cupit ’63
San Antonio
Sue & Charles S. Currie ’77
Fulshear
Mary ’76 & Monty Davis ’77
Cypress
Bethanne ’07 & Clint Dempsey ’04
Bryan
Scarlet & Charles Drane ’64
Palestine
Dorothy L. Allen Golding
San Antonio
Robert G. Gootee ’73 & Jason R. Gootee
Portland, OR
Friends & Family in Memory of Jerry A. Hajek, III
Houston
Janet A. Handley ’76
College Station
Marie & Otto Hanneman ’77
Denton
Mrs. Patricia J. & Dr. Matthew A. Harthcock ’82
Stow, OH
Benjamin J. Hayford ’14
Irving
Debbie & Mike Hilliard ’73
College Station
Sharon & Frank O. Holder, Jr. ’68
San Antonio
K. L. Hughes in Memory of Dr. Deidra Blackmon
Trophy Club
Karen & Hugh James ’68
Largo, FL
W.A. “Bill” Jentsch, Jr. ’80
Houston
Debra & Douglas B. Johnson ’82
Houston
Melissa S. Kibler ’89
Hinsdale, IL
Jane & Jerry Kingsley
College Station
Natalie T. & John C. Kunkel ’84
Ponte Verde Beach, FL
Ginger & Jerry Leininger ’64
Placentia, CA
Natalie E. Lewis ’79
Houston
Lynne ’85 & Allen Mabry ’82
Dallas

OUR NEWEST HERITAGE MEMBERS JULY 2016-JUNE 2017
Heritage membership totals 2,472 donors—117 of whom were welcomed in 2016. Generous gifts contributed by these individuals total $1.135 billion since 1999. Within the past 11 years, more than $186 million of those planned gifts were put to work, with every dollar going to support Texas A&M students, faculty, colleges and programs.

The Office of Gift Planning works hard to serve donors through the estate planning process and ensure the Foundation’s mission of uniting generosity and vision. In fiscal year 2016, the Foundation documented more than $120 million in planned gifts in sizes ranging from $10,500 to $10 million. Support for Texas A&M is on the rise, and gift planning officers find that donors typically make their largest contributions for the university as planned gifts.

“It’s less about how much you give and more about being committed to give something,” said Heritage Member Bill Ouren ’74. “The needs of Texas A&M are so broad that if you work with the experts and specialists at the Foundation, you can fashion a way to feel proud about what you do. Once you start giving, the rewards you receive in return are priceless.”

“TEXAS A&M GAVE OUR DAUGHTERS A STRONG EDUCATION, TAUGHT THEM HOW TO BE SERVANT LEADERS AND PUSHED THEM TO BE BETTER PEOPLE. EVEN THOUGH WE DIDN’T ATTEND TEXAS A&M, WE ARE PROUD TO SUPPORT A UNIVERSITY THAT PROMOTES VALUES.”

- Jane and Jerry Kingsley

Kim Manry
Bryan

Carol L. & Clarence E. “Buster” Mason ’67
Grapevine

Mary G. ’04 & Clark T. Maxwell ’05
Houston

Macon McDonald ’75
Midland

Bridget & Shelby McDougall ’61
New Braunfels

Debbie & John M. McNair ’76
San Antonio

Kathryn King-Metters & Rich Metters
College Station

Debbie & Mike Mitchell
Marble Falls

Thomas E. Natho ’68
Port Arthur

Beth Nauert, M.D. ’79
North Bend, WA

Sharee & David Norcom ’73
Bryan

Ozden Ochoa ’77
College Station

Lori O’Neal
Collegeville

Curt Paulson ’85
Livingston

Ann Rhoads ’85 & John Paulus
Houston

Drew Porter ’99
Grimes, IA

Bradley M. Rowe ’97
Charleston, WV

Gerald E. Ryan ’59
Bryan

Bonne ’86 & Geoffrey Sandars ’93
Round Rock

Margaret L. ’97 & David A. Schell ’97
Round Rock

Rene & Curtis Schulze ’58
Mason

Nancy N. & M. Leroy “Shafe” Shafer ’67
Missouri City

Sharon M. ’90 & Charles W. Shaver III ’80
Villanova, PA

Letty ’88 & John Spicer ’83
Dallas

Karen H. & Stephen S. Stewart ’68
Huntsville, AL

Lynn & Bob Vacek ’71
Sugarland

Abigail Van Doren ’79
Brunswick, ME

Grace Wolf and Wilda ’80 & Dan Wahrenbrock
Benham

Brian C. Waldrop ’91
Brooklyn Park, MN

Cindy (Green) ’84 &
Tony Weber ’84
Dallas

Ingrid A. & Frederick R. Willis, Jr. ’53
Lakewood, WA

Tiffany Y. Wilmore ’98
Katy

Leah & Bonsall S. Wilton ’72
Cypress

Barbara R. & Ronald L. Winder
Tulsa, OK

Charity ’97 & Ryan Workman ’99
Little Rock, AR

Lorraine & Ed Wulfe ’55
Houston

Linda & Craig Young ’66
Highlands Ranch, CO
Reveille IV stands proud in front of the iconic Academic Building with her mascot corporal, Robert K. “Bob” Vanderberry ’78.

Share your memories with us at giftplanning@txamfoundation.com.

Photo courtesy of Cushing Memorial Library & Archives