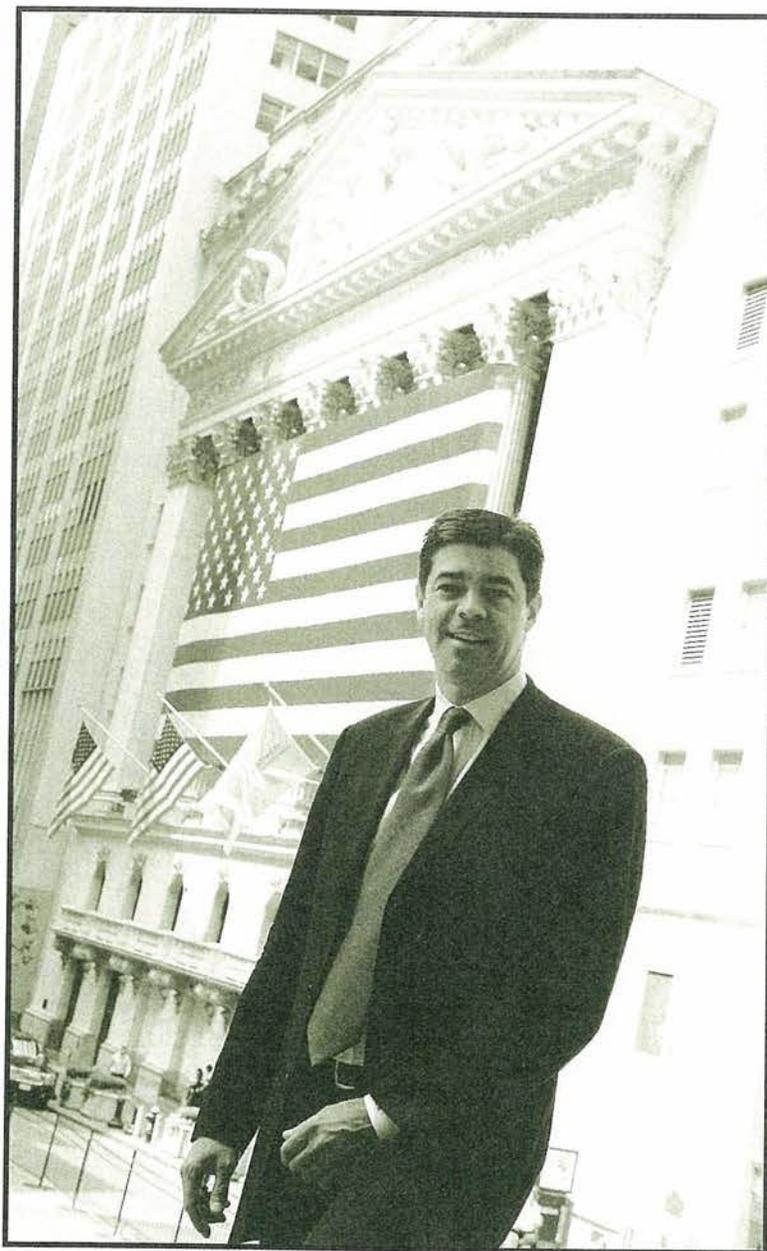


SPIRIT



Young philanthropists like Craig McMahan '90 take the spotlight in this issue of *Spirit* magazine. While the older, more affluent generations of donors make up the bulk of private support for Texas A&M University, many former students like McMahan are finding ways to contribute—through creative methods of giving and often driven by a passion to make a significant impact. Their legacies are becoming a special part of the Aggie Spirit.

Gen X and Y Aggies Come of Age

We've been thinking a lot lately at the Texas A&M Foundation about young philanthropists. A recent statistic about Aggie graduates might surprise you: half of all living former students graduated since 1991.

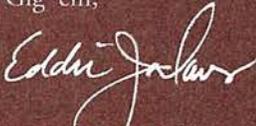
While each generation of Aggies has a unique set of values, attitudes and motivations, we know from a recent study that our former students of all ages want their gifts to make a significant impact on academics at Texas A&M. They want to influence the life of students and faculty who will then go on to change our world. The people you will read about are making such an impact, with gifts ranging from million-dollar commitments to those that cost less than \$100 per month.

We often feature donors who are members of the Traditionalist generation, but in this issue we decided to highlight former students from three younger generations who have found their own altruistic niche. These Baby Boomers, Generation X'ers and Millennials (those born roughly between 1981 and 1999) all demonstrate that the Aggie Spirit continues to thrive across generations.

At the Foundation, we appreciate and rely on this aspect of the Aggie Spirit to continually secure private support for Texas A&M. State funding doesn't come close to providing all the scholarships, faculty support and facilities. Aggie philanthropy becomes more critical as class sizes expand and state funding for higher education continues to contract.

Aggies share a common spiritual bond grounded in our experience at Texas A&M. Whether you are a member of the Class of 1947 who fought in World War II or 23 years old and interviewing for your first job after graduation, you probably reserve a special place in your heart for this place we call Aggieland.

Gig 'em,



EDDIE F. DAVIS '67
PRESIDENT
TEXAS A&M FOUNDATION

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Emerging Philanthropists

At 24 years of age, Sarah McMaster '04 has every reason to focus her energy on building a solid financial foundation. But the associate at Deloitte Financial Advisory Services in Houston has another aspiration, as well: helping students at Texas A&M University.

"As a student at Mays Business School, I benefited from the gifts of former students," said McMaster, who received both a President's Endowed Scholarship and a Mitte Scholarship from the Texas A&M Foundation. "It seemed fitting for me to continue the tradition. I gave my time when I was a student through participation in service organizations. That's not an option now, so I give my resources instead."

McMaster is one of an increasing number of young people who view philanthropy not as a burden, but as an obligation. She may not yet be capable of making donations comparable to those of older, more affluent Aggies, but—all things considered—she definitely does her part. Fundraisers are heartened by the growing philanthropic trend among young graduates like McMaster.

Every Little Bit Helps

Young donor prospects are bombarded with reports of substantial gifts made by wealthy benefactors through the mainstream media and through their universities' marketing. But marketing experts say one of the main messages that members of the Generations X and Y/Millennial age groups need to hear is that small gifts are just as vital to the health of their universities.

More and more, university fund raisers are joining their counterparts at other non-

profit agencies in targeting the pool of potential donors that reside between "megaphilanthropists" and those giving \$25 or less per year.

Apparently, young donors are getting the message.

"It helps to start small," explained A. Kathrine Word '00, a 28-year-old senior portfolio manager at KeyBank Real Estate Capital in Houston. "I have always been taught, and believe, that you give back when and how you can."

McMaster agrees: "Giving should be a lifestyle—not something that just begins when you feel it's convenient for you."

These young Aggie donors also are proving true a fund-raising philosophy that's gaining momentum throughout the non-profit world: Cultivating small donors is worth the effort since they are likely to give more as their incomes increase.

"I believe that every little bit helps," said 25-year-old real estate broker Meredith Keeling '02 of Hearne. "I'm young and my giving potential compared to older donors is not as great, but hopefully I will be able to donate more as I progress in my career."

"You have to look at things in perspective," she added. "I don't feel like I am expected to be able to donate as much as some of the more established former students."

Cathy Harlan '01, a 26-year-old transactional attorney in Houston, said she's not at all intimidated by other donors' large gifts. "I figure that for my age and salary, I am keeping pace with the older donors, and I know that eventually I will be able to contribute on a much greater scale," she said. "But it would be nice to have better tickets for the football games."



“I’m young and **my giving potential**
compared to older donors is not as great, but hopefully
I will be able to donate more
as I progress in my career.”

*Meredith Keeling '02
with Bear, her airdale terrier*

Reaching Generations X and Y

Effective methods of reaching potential donors in the Generation X (born 1965 to 1980) and Generation Y/Millennial (born 1981 to 1999) age groups has proved elusive for non-profit fund raisers.

In a 2003 study, Indiana University Center on Philanthropy scholars Richard Steinberg and Mark Wilhelm found that Generation X-headed households donate considerably less than their predecessors. While 80 percent of households from pre-World War II generations and 75 percent of baby boomers (born 1946 to 1964) gave more than \$25 to charity in 2000, only 53 percent of Generation X households did the same.

This is not surprising because the prewar generation is wealthier than the other two and has a higher income level.

But their research asks whether prewar households “are more generous in some deeper sense.” And their findings indicate that “the

difference between the prewar and the other two generations is highly statistically significant and numerically large, whereas there is little difference between Boomers and Gen X’ers. This difference is not an artifact of income, wealth, or many other factors.”

Steinberg and Wilhelm suggest that “perhaps the shared sacrifices these families faced in World War II and Korea or the higher levels of participation in some types of community organizations led members of this generation to make larger sacrifices to help others.”

But fund-raising experts are quick to note that a failure to give on the part of those under 40 should not connote an unwillingness to give. It is simply taking non-profits—including universities—a long time to adjust their fund-raising tactics from those effective with traditionalists and baby boomers to those that will garner the attention of younger generations.

In their book *When Generations Collide: Who They Are. Why They Clash. How to Solve*

the Generational Puzzle at Work, authors Lynne Lancaster and David Stillman determined basic traits for each generation.

Those from Generation X, they wrote, generally are more skeptical than those from previous generations. While “traditionalists” (also known as the “silent generation”)—born 1925 to 1945—tend to be patriotic and loyal and place great faith in institutions, those in Generation X typically are distrustful of institutions. The next age group—Generation Y/Millennial—is realistic, as well, but tends to be more optimistic. This is the most worldly, diverse, open-minded generation, and its members are globally concerned and want their work to be meaningful. They want to be more directly involved in the charities they

GIVING ACROSS GENERATIONS IN THE UNITED STATES

	Everyone	Prewar	Baby Boom	Generation X
Percent who gave	69.0%	80.0%	75.0%	53.0%
Sample Average Gift (includes non-givers)	\$1,328.00	\$1,788.00	\$1,662.00	\$532.00
Sample Average Gift (excludes non-givers)	\$1,942.00	\$2,269.00	\$2,222.00	\$1,025.00
Sample Median Gift (includes non-givers)	\$303.00	\$620.00	\$500.00	\$40.00
Sample Median Gift (excludes non-givers)	\$775.00	\$1,080.00	\$928.00	\$400.00
Sample 95th Percentile (includes non-givers)	\$5,600.00	\$6,386.00	\$6,700.00	\$3,000.00
Number in Sample	4,616	1,117	2,008	1,491
Predicted Average Gift (includes non-givers)	\$1,328.00	\$1,764.00	\$1,254.00	\$1,100.00

From “Patterns of Giving and Volunteering” (2001), Richard Steinberg and Mark Wilhelm, Indiana University Center on Philanthropy

TEXAS A&M FOUNDATION GIVING BY DONORS AGE 40 OR YOUNGER

	Count	Foundation & AFS Giving		Foundation Giving	
		Total	Current Gifts	Planned Giving	Total
Current Students	176	\$10,148.48	\$9,386.40	\$0.00	\$9,386.40
Graduates 2000-2005	875	\$346,530.26	\$242,038.42	\$300,000.00	\$542,038.42
Graduates 1995-1999	1,540	\$1,104,438.09	\$556,320.68	\$1,025,000.00	\$1,581,320.68
Graduates 1990-1994	2,219	\$2,927,849.18	\$1,371,061.31	\$1,082,800.00	\$2,453,861.31

support than do their predecessors, and they must trust the group benefiting from their gifts.

"I only participate in or give to groups that I believe in," Keeling said. "How they handle the money I donate is important to me."

Rather than give to a general college or department fund, many young donors to the Texas A&M Foundation are specific in how their gifts are to be allocated. Keeling's gift, for instance, is helping the College of Agriculture Development Council, where she serves as a member. Sean '01 and Heather Sustman Golden '99 gave to the J. Malon Southerland Aggie Leader Scholarship program, which rewards students for campus involvement. The new Women's & Gender Equity Resource Center will benefit from a gift by Melissa Kalka '05. And McMaster gave not only to the Mays School, but also to Aggie Habitat for Humanity.

McMaster's Habitat gift demonstrates yet another trait of younger donors: a desire to use their resources to make a broad social and economic impact. This goal was demonstrated by eBay founder Pierre Omidyar and his wife, Pam, in last year's \$100 million donation to Tufts University—the largest single gift in the Massachusetts' institution's history. The Omidyar-Tufts Microfinance Fund will entail the creation of "microloans" to poor families in developing countries so they can start their own businesses. Income from the fund also includes financial aid and debt forgiveness to graduates who enter the public service field. Both of the Omidyars' graduated from Tufts in the late 1980s.

Young donors across the United States also share a competitive streak when it comes annual fund-raising drives. Universities of the Big Ten Conference are capitalizing on this competitiveness with the Big Ten GOLD Challenge, which measures which school has the most "loyal alumni." The challenge's website (<http://www.bigtenchallenge.org>) is geared toward those who have graduated in the last 10 years and pits their giving rates against graduates of rival universities.

The overall goal, of course, is to increase the percentage of the youngest alumni giving back to their alma maters. Often these graduates establish a pattern of smaller donations before they are able to consider making a major cash or planned gift. So the philanthropic mindset of many young Aggies begins with giving to an annual fund through programs like The Association of Former Students' Century Club.

Aggie Giving

Despite the fact that various age groups respond differently to the same fund-raising tactics, young Aggie donors repeatedly emphasize the giving motivation that has defined Aggie philanthropy for generations: their love of Texas A&M.

Kalka, 22, a credit analyst with American National Bank of Texas in Dallas, made her gift to thank the Mays School advisers and university community members who supported her through a personal trauma. McMaster would like to see the Mays School and Aggie Habitat for Humanity continue to influence others as they influenced her. Sean Golden, 27, a reservoir engineer for Hilcorp Energy Co. in Houston, said his President's Endowed Scholarship was one of the main reasons he chose to attend Texas A&M, and he wants to provide this same opportunity to another student.

But it was Harlan who best summed up why Aggies have given back to Texas A&M for generations, and will continue doing so for generations to come: "Of every organization in which I am a member, including the State Bar of Texas, being an Aggie gives me the greatest sense of pride." ♦

—by Kara Bounds Socol

GENERATIONS

*According to Wikipedia (<http://en.wikipedia.org>), William Strauss and Neil Howe, in their book *Generations*, list the generations of America. Their definition of "generation" is given as a cohort group in which are all persons born in a span of about 22 consecutive years, and whose boundaries are fixed by "peer personality." "Peer personality" is a generational persona recognized and determined by common age, location, beliefs and behavior, and perceived membership in a common generation.*

Baby boomers are people with birth years from the span 1945 to 1964, which may comprise more than one generation.

Generation X is a term for the group of people born following the peak of the post-World War II baby boom. While all sources agree the group includes at least some people born in the 1960s, Generation X'ers generally are assumed to be born between the years 1965 and 1980.

Members of **Generation Y**—also called "The Net Generation," "Millennial," "Echo Boomers," "iGeneration," "Second Baby Boomers," and "Google Generation," were born immediately after Generation X, between the years 1981 and 1999. They are considered to be the last generation of Americans wholly born in the 20th century, including those in their mid- and early 20s, teenagers and children over the age of 5.

AIM



FOR AGGIES, THERE IS NO PLACE LIKE HOME.

Aggieland may be “college” when you are student, but is more like “home” when you leave. This could be the reason why so many former and—surprisingly—current students are giving back to Texas A&M. ¶ The Texas A&M family is founded on a communal spirit not easily verbalized or expressed but only lived. And it seems that no matter their diverse backgrounds, interests, majors or creeds, all of those who choose to give back to Texas A&M University do so for the same reason: they wish to contribute to Texas A&M to make it a world-class institution, and to assist Aggies who will go on to become leaders who will change the world. ¶ All three fundraising organizations at Texas A&M communicate with freshman Aggies to begin planting the seed of philanthropy while they are still young and making decisions about what they want to do with their lives. The intent is not to solicit for cash donations, but only to increase awareness of the enormous role that philanthropy plays in their lives at Texas A&M.

GIVING BACK
BEFORE
GRADUATION

The Texas A&M Foundation, The Association of Former Students and the 12th Man Foundation all participate in Fish Camp and other student activities so that freshman learn that without the generosity of former students and friends of the university—

including individuals, foundations and corporations—Texas A&M would not be what it is today.

Like many Texas A&M students and graduates, Jordan Baucum '06 says the university provides an environment in which an individual can find his or her personal best. Success at Texas A&M means understanding that the more you put into your education the more you will receive. "It is here at Texas A&M that students learn the ultimate lesson: that fears are meant to be conquered, that love is meant to be shared, and that we are stronger and braver when we stand together," Baucum says.

Because of what he found at Texas A&M, Baucum felt a desire to give back financially. After a generous summer internship with Chevron's Global Marketing Latin America

Division, Baucum found that he could provide financial support of \$350 to Texas A&M University through the Texas A&M Foundation, and with matching gifts the true amount is \$500. The gift will support student organizations, such as the MSC Abbott Family Leadership Conference.

"As a first-generation Aggie, I have been the recipient of a tremendous amount of support far beyond financial assistance," said Baucum. "My hope would be for me to have laid a foundation for success for future classes to build upon, and in doing so ignite a spark and a passion for service that would continue well into the future."

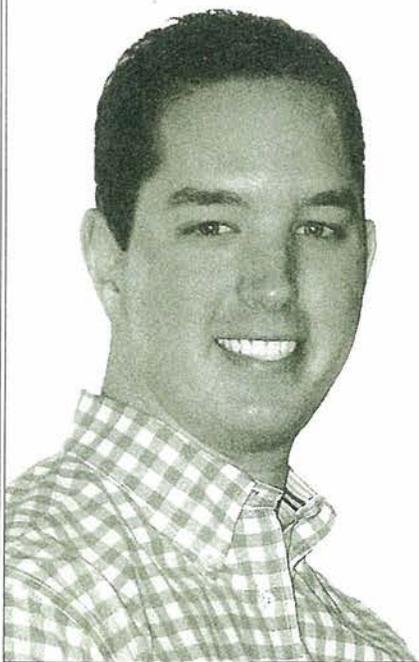
More than 220 Texas A&M students are financial donors to the university. Some gifts are small, some are large. Most are made directly toward a particular college or student organization. More than 100 students from the Class of 2006 have made gifts to the Texas A&M Foundation totaling \$7,935, and—although it's a small amount—seven students in the Class of 2009 already have donated to the Foundation for the benefit of Texas A&M.

After an initial \$215 gift, Jeffery Stefancic '08 has been making \$5 donations to the Student Life Fund almost every month since 2003. A small amount, perhaps, compared to some of Texas A&M's high-powered philanthropists, but by the time he completes his degree Stefancic's gifts could easily support a Student Life program that will make a difference in the lives of many Aggies.

University foundations around the country are tapping the fundraising resource of its current students with hopes of increasing awareness of giving when they graduate. The University of North Carolina's *Carolina First* campaign responded to their students' interest in giving by creating Heelraisers, a student giving society. "We established the Heelraisers campaign in fiscal year 2004 because we noticed that a few students were giving without being asked," said Katisha

"My hope would be for me to have laid a foundation for success for future classes to build upon, and in doing so ignite a spark and a passion for service that would continue well into the future."

JORDAN BAUCUM '06



Newkirk, assistant director of the annual fund for Carolina First. "We saw an increase in underclassmen giving by 2,793%. That is going from 15 donors in 2003 to 419 donors in 2004.

The Heelraisers Student Giving Society is continuing to have phenomenal growth and is focused on making their name common around campus. They have produced posters that have been placed on campus stating that private support helped in these locations.

At Texas A&M, the 12th Man Foundation started a similar athletics-focused giving program for students called the 12th Man on Campus Student Executive Board. The students pay membership fees of \$25 a year to enjoy interaction with coaches and players of Aggie athletic teams. The 186 members are involved with community service and fund raisers for the Athletic Department.

"We are also in charge of selling the 12th Man towels before football games, and we place the towels in the student section for the basketball games," said Bobby Roggenbuck, President of 12th Man on Campus. "We made the 'Saw'em Off' towels for the t.u. game this year."

Baucum says many current students think that giving is for "rich old guys," but that's not the case. "The size of the gift is no consequence; when I have more, I will give more, but relaying the message to current students is the most important hurdle both The Texas A&M Foundation and The Association of Former Students faces in the coming years," he says.

Not all students are able to express their passion for Texas A&M through financial means. Instead students fill their free time being involved in student organizations that provide service to the students and community.

Senior civil engineering major and 2006 Class Council Secretary Jeremy Blevins says many student organizations are able to operate only because of the generosity provided by

students. "Throughout the year, we sell event T-shirts and dance tickets," said Belvins. "That way the students can support their class that eventually goes to the senior gift."

The backbone of Texas A&M University is its student body, both current and former. For an institution that prides itself so strongly on tradition, philanthropy before and after graduation is customary for Texas Aggies. Students and former students have a variety of avenues to give back to the university. There is a way that fits every person's need. From scholarships to gifts of life insurance, philanthropic opportunities are limitless. But the real fun is in the giving.

"Although my gifts are small by most standards, I feel there is no better time to give back than when you can see the impact of your gift firsthand," said Baucum. ♦

—by Patrick Connor '07

AGGIE UNDERGRADUATE PHILANTHROPY

Many students are inspired to give back to Texas A&M even before they graduate and find employment. Here's a list of some of the programs they are supporting now with \$100 or more.

Walk of Champions Endowment

—Recreational Sports

MSC Enrichment Fund

Corps of Cadets Center

J. Malon Southerland '65 Aggie

Leader Scholarship

Fightin' Texas Aggie Yell Leaders

Texas Cooperative Wildlife Collection

University Honors Program

Agricultural Economics Recognition Fund

Howard "H2" Hesby Scholarship Fund

Educators Shape the Future

Commodity/Congressional Intern

Scholarship Fund

Student Life Fund

A LEGACY WORTH INSURING

*A Gift of Life Insurance Can Bring
Satisfying Philanthropic Rewards*

As a younger former student of Texas A&M University, you might assume you can't make a significant gift to your school until you attain a six-figure salary or hit the jackpot in the lottery. But for the price of a monthly life insur-

ance premium—perhaps as low as \$25 per month—you can make an impact and leave a considerable legacy for Texas A&M University.

Consider the following ways to make a gift of life insurance to the Texas A&M Foundation:

CHOICES FOR GIVING LIFE INSURANCE TO THE TEXAS A&M FOUNDATION

A PERMANENT GIFT

(You permanently name the Texas A&M Foundation owner of your life insurance policy. The agreement is final.)

How to give an irrevocable gift of life insurance

Purchase a new life insurance policy and name the Texas A&M Foundation owner and beneficiary of the policy.

—OR—

Relinquish ownership of an existing life insurance policy to the Texas A&M Foundation, naming the Foundation owner and beneficiary.

In either case, you continue to pay the premiums.

Advantages

You receive a charitable income tax deduction.

You can take tax deductions on your premiums.

You can specify how you want the gift to be used. For example: scholarships; faculty support; any program; or for unrestricted use.

You may specify that your gift is to be used to create an endowment named for yourself, your organization, family members or friends. The resulting annual support for Texas A&M is indeed valuable.

A PROMISED GIFT

(You can retain full control of the policy during your lifetime and provide the insurance proceeds for Texas A&M University after your lifetime)

How to give a revocable gift of life insurance

Purchase a new life insurance policy and name the Texas A&M Foundation beneficiary.

—OR—

Change the beneficiary of an existing life insurance policy to the Texas A&M Foundation.

In either case, you continue to pay the premiums.

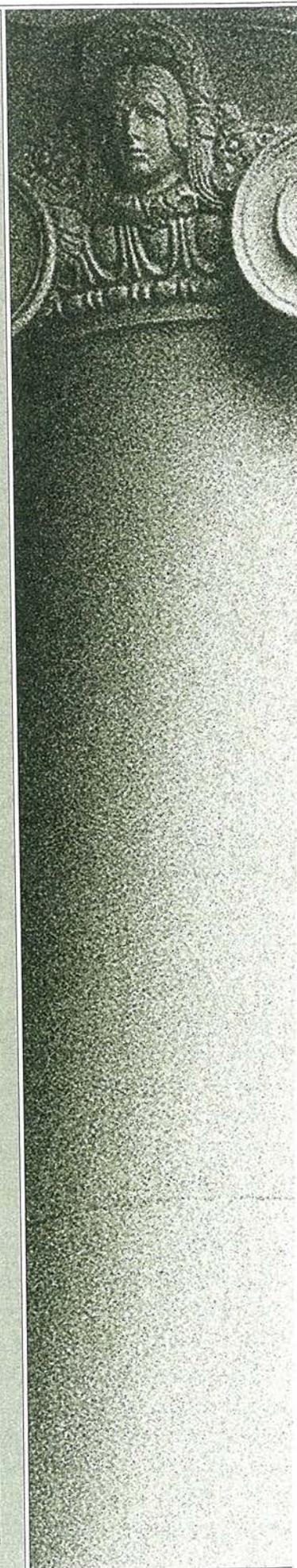
Advantages

You retain control of your life insurance policy, and you can change your mind later.

You can specify how you want the gift to be used. For example: scholarships; faculty support; any program; or for unrestricted use.

You may specify that your gift is to be used to create an endowment named for yourself, your organization, family members or friends. The resulting annual support for Texas A&M is indeed valuable.

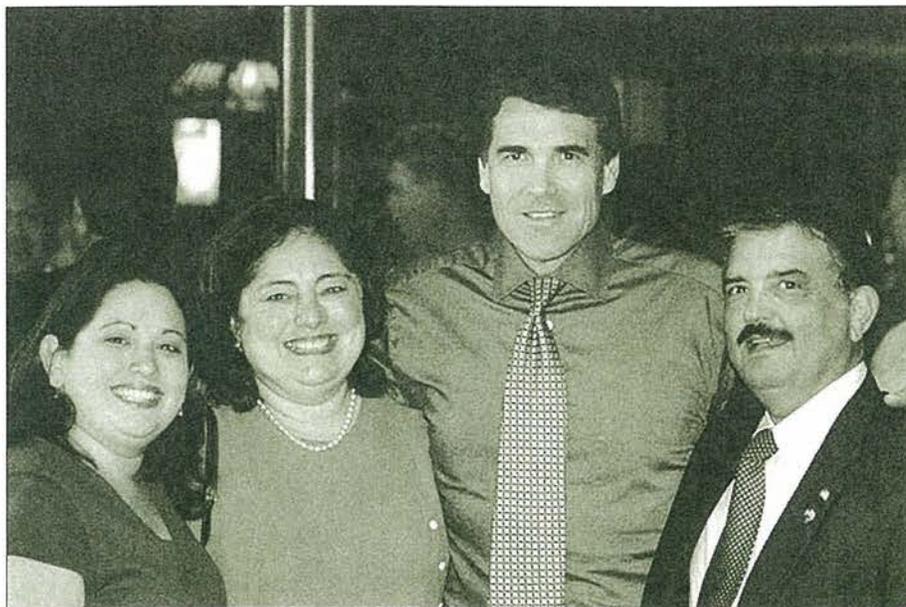
** For more information, contact the Texas A&M Foundation Office of Gift Planning.*



THESE THREE YOUNG AGGIES ARE INVESTING IN ACADEMIC EXCELLENCE THROUGH GIFTS OF LIFE INSURANCE.

Rebecca L. Garcia '98

Becky Garcia '98 always knew she wanted to be an Aggie. She is one of 17 family members on her father's side who are graduates of Texas A&M. As expected, Aggie traditions run



ABOVE: With Gov. Rick Perry '72 at a 2004 Corpus Christi political fundraiser is (L to R) Becky L. Garcia '98, her mother Berta L. Garcia, Perry and her father, Eddie L. Garcia '70.

CENTER: Maj. Matthew Densmore '95 and Maj. Stephen Ruth '92 were leadership instructors to cadets at the United States Military Academy last summer at West Point, New York.

deep in her family. Her great uncle, Victor Rodriguez '45, was part of a group that held Aggie Muster on Corregidor Island in the Philippines during World War II.

Garcia worked for Clear Channel Communications in Dallas until 2002 as an account executive at Fox Sports Radio. She also worked for her father's insurance company and with New York Life for a few years before becoming marketing director of LaredoCalendar.com, a community calendar that she purchased with her mother.

Soon after she landed the job with Clear Channel, Becky realized that many people do not have the opportunity to go to college and many others must struggle to pay for their education. "I was fortunate that I received a scholarship my first year at Texas A&M and that my parents paid for the rest of college," she said.

With advice and assistance from her father, Eddie L. Garcia '70—who owns an

insurance company in Corpus Christi—she plans to establish an Endowed Opportunity Award through a life insurance policy. The scholarship will be funded by an endowment established with the life insurance proceeds. Based on Garcia's wish, it will help a first-generation college student from South Texas who plans to study business at Texas A&M.

Giving to the Texas A&M Foundation through life insurance policies has become a family affair. Not only have Garcia and her father set up policies, but her sisters, Rosella L. Garcia '00 and Rubiana L. Garcia '03, also are in the process of doing so. "I loved the way of life at Texas A&M and I want to help someone achieve that same experience."

Major Stephen G. Ruth '92

Stephen G. Ruth '92 believes in the saying, "to whom much is given, much is required." True to these words, this young military officer has done much to fulfill his requirements. At the age of 35, Ruth already has funded a leadership and scholarship award at Angleton High School, where he served as Senior Class President in 1988.

Ruth donates annually to The Association of Former Students, and in 2001 purchased a life insurance policy with the Texas A&M Foundation as the beneficiary.

A major in the U.S. Army, Ruth is an assistant professor of leadership at the U.S. Military Academy at West Point, New York. He recently served in Operation Iraqi Freedom as a negotiations trainer.

While many philanthropists await significant financial success before they make large donations, Ruth did not want to wait to give back to Texas A&M.

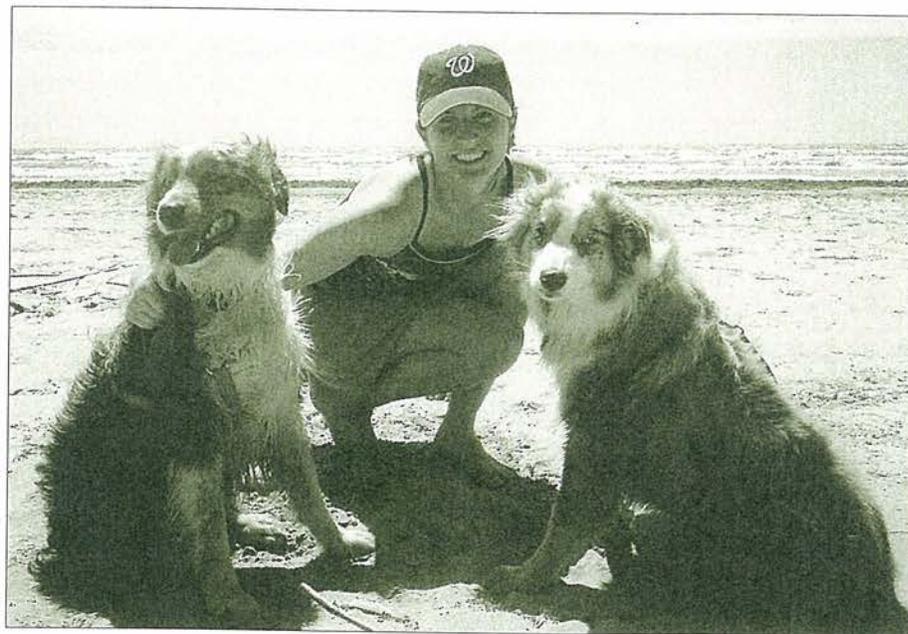
"My experience at Texas A&M created invaluable opportunities for me to learn, grow and serve, all of which significantly shaped my life," he said. "Giving a life insurance policy to the Texas A&M Foundation allows me to show my lifetime commitment to Texas A&M, a place that has given me so much."

Ruth, who also served in Operation Intrinsic Action in Kuwait, Operations Joint Endeavor and Joint Guard in Bosnia-Herzegovina and Operation Able Sentry in Macedonia, relished Aggie traditions while serving in the Corps of Cadets at Texas A&M and as student body president his senior year.

He has been back to his high school and also to the Texas A&M campus sharing these ideals with students for the past 14 years. He helps choose the recipients of the scholarship he funds in Angleton, always on the lookout for students who have demonstrated leadership and philanthropy. Ruth strives to achieve these same qualities. He and his wife, Bettina, hope their son, Stephen G. Ruth II, Aggie Class of 2028, will do the same.

Klayre Simon Lewis '00

Klayre Simon Lewis '00 was the first person in her family to go to college and she wants to help someone else have the same opportunity. She was drawn to Texas A&M by its traditions and marine biology program. She began her studies at the College



ABOVE: Klayre S. Lewis '00 with her two Australian shepherds, Bula and Bella, last April on Stewart Beach in Corpus Christi.

Station campus, and received her degree in marine fisheries from Texas A&M at Galveston in 2000. She also has a master's degree in counseling from the University of Houston.

A few years after graduation, Lewis was looking for a way to give back to her beloved Texas A&M. She wanted to contribute in a big way without draining her savings or other liquid assets at a young age. She found an innovative solution in a family business. Lewis and her husband, Jeffrey, are part owners of a Nationwide Insurance office that Jeffrey's mother, Karen Coady, created in Houston in 1994.

With the help of the Texas A&M Foundation, Lewis was able to create a significant contribution to the Texas A&M Foundation through a life insurance policy. An endowment will be created with the proceeds of her life insurance policy.

"Life insurance is one way of giving that many people may not be aware of, but the process to set it up was a breeze," Lewis said. "The money the Texas A&M Foundation will receive upon my departure versus what I will pay really doesn't compare. It's affordable."

Lewis hopes that those benefiting from her generosity will be instilled with the same giving spirit. ♦

—by Carrie Paxton-Lamke

Making a gift of life insurance is easy. Contact Glenn Pittsford at the Texas A&M Foundation Office of Gift Planning at 800-392-3310 or g-pittsford@tamu.edu for additional information and assistance as you contemplate your life insurance legacy gift for Texas A&M. Your life insurance agent can help you obtain the proper forms to create or transfer a policy. It's important to inform the Texas A&M Foundation of your life insurance gift as soon as you finalize your plans so we can record your gift and recognize you as a Heritage member of the Legacy Society.





The Faculty Club in Rudder Tower was not a place where Texas A&M Foundation Board of Trustees outgoing Chairman Ray Rothrock '77 expected to experience one of the most pivotal events in his life. It wasn't the location of the lunch that proved to be so important; instead, it was the person who sat across the table. Rothrock, a sophomore nuclear engineering major, had been invited to have lunch with J. Wayne Stark, director of the Memorial Student Center.

A STARKIE MAKES GOOD

"Wayne recruited students to leadership positions. He opened our eyes to the bigger university and to the world around us," Rothrock said, adding that to this day, he has no idea how Stark identified him. "So I got involved at the MSC, signed up for the Radio Club, got elected president and appointed to the MSC Directorate where I met many, many leaders. It was contagious and Wayne knew just what buttons to push."

Not only did Stark get students involved, but he also encouraged them to become leaders and to give back. Describing Stark's style as being similar to the political whip who organizes action in legislatures, Rothrock remembered his advocate saying, "It's your responsibility to fix that, to lead that." He was pretty convincing."

The Fort Worth native had already been ingrained with the importance of service by his family, so he took Stark's advice to heart. His commitment was visible very soon after graduation when Rothrock made donations to The Association of Former Students. "I don't know how old I was—21 or 22," he said. Rothrock especially credits his wife, Meredith,

who has given her continual support to his professional career choices as well as his ongoing participation in and financial contributions to the university and the Texas A&M Foundation.

Ed Davis '67, the Foundation's president, believes more people should consider adopting Rothrock's philanthropic stance. "People should start early in their lives giving to those things they feel strongest about—their faith, their favorite charity, their alma mater," Davis said. "The American way of life is based in part on philanthropy doing things government can't afford. Government agrees with that by giving incentives to enhance our charitable motivations. So, former students should think about 'tithing' to their favorite charities. Texas A&M should be in the top 2–3."

Rothrock, who now resides in California, has over the years focused primarily on giving to the liberal arts and other programs due to Stark's early influence. "I love science and math, but I always had a bias for the performing arts," he said. "And over my young adult career and graduate school, it became very clear to me why the liberal arts were so impor-

tant. I wish I would have taken more and done more in the liberal arts. Wayne Stark, again, was a big promoter of these things when I was at A&M. He encouraged me to take extra liberal arts courses every semester. So I took philosophy, sociology and art history as well as my engineering coursework.”

That wide-range of interests has served him well in his role as a venture capitalist.

MR. ROTHROCK'S GENEROUS

SUPPORT OF MUSIC AT TEXAS

A&M MEANS THAT OUR STU-

DENTS, AND THE LARGER

COMMUNITY, CAN SEE AND

HEAR INTERNATIONALLY

RENOWNED ARTISTS FROM A

WIDE RANGE OF CULTURES.

Dr. Judith Hamera
*Head of the Department
of Performance Studies*

“Ray thinks deeply about our world and all that implies,” said Charles A. Johnson, dean of liberal arts. “His work deals with technology and the business of technology, but he is curious about the philosophical and humanistic underpinnings that guide how we proceed in this world. One of the true pleasures of my role as dean of liberal arts has been meeting and getting to know Ray Rothrock.”

In addition to being the Foundation's outgoing Board of Trustees chairman, Rothrock is a member of the College of Liberal Arts Development Council. He has generously funded two endowments in the

college: the Meredith and Ray Rothrock Endowment for Excellence in the College of Liberal Arts, established in 1996; and the Ray A. Rothrock Endowed Chair, an endowed faculty position in music, established in 1999.

His interest in the university's music program traces back to his participation as a charter member of the Texas A&M Symphonic Band in 1974. “Back then, it was frustrating for guys like me who were not members of the Corps, but who wanted to have music in their life,” he said. “Being an engineering major, I wanted some aspect of the arts, preferably the performing arts, in which to participate.”

His interest in supporting the university's performing arts continues today. “Mr. Rothrock's generous support of music at Texas A&M means that our students, and the larger community, can see and hear internationally renowned artists from a wide range of cultures,” said Dr. Judith Hamera, head of the department of performance studies. “He has provided unique opportunities for understanding the importance of music as an aesthetic form and as a way of articulating national and cultural identity. We are enormously grateful to him.”

For example, Rothrock's funding helps underwrite “Music and Voices of Central Asia” presented by the Aga Khan Music Initiative in Central Asia. This recent performance offered an in-depth look at Central Asia's rich and diverse musical traditions that are reemerging after decades of Soviet rule.

Stark's influence also is evident in another area that Rothrock supports—the Wayne Stark Endowed Fund. The fund carries on a Stark tradition of organizing travel for students to visit graduate schools and meet top professionals. “All of the money goes to taking students out of College Station and letting them see the world,” Rothrock

explained. "I've supported the Northeast Trips (to visit top graduate schools) and other things. I've sponsored cocktail hours at the Harvard Club in New York City. I've lectured on venture capital to the Business School on their trip to New York when I worked there. I love Texas, but there is a big world out there and the more one is exposed to it, the better equipped one becomes for life."

Rothrock himself went on one of these trips as a student. Stark introduced the A&M contingent to the deans and admissions officers at some of the best graduate schools in the country. That trip opened the doors for Rothrock to earn two master's degrees—one in nuclear engineering from MIT and one in business from Harvard. "I went to MIT to be a professor. Instead, I learned a whole lot more about me than I expected. The nuclear industry was going through a transition at that time. One of my mentors at A&M told me when I went off to MIT, 'Be sure you know what you want to study for your PhD.' After my master's, frankly I wasn't sure," he recalled. I chose MIT because of the engineering and science, my first love. Later as I morphed my career into start-up companies and moved to Silicon Valley, it became clear to me that an MBA would open doors I couldn't open otherwise in venture capital. I called Wayne Stark to feel him out on the idea. He laughed and told me I was too old—but wrote my reference to Harvard Business School anyway. He challenged me in the way only Wayne could."

That business background has proven invaluable during his tenure on the Board of Trustees. "Ray Rothrock has contributed to the Texas A&M Foundation Board of Trustees in many, many ways," Davis said. "First of all, Ray joined the Foundation's Investment Advisory Committee several years before he became a trustee. He is general partner of

Venrock and Associates, one of the top venture capital firms in the country. We asked Ray to come on board and help us with our thinking and strategy as we began adding venture capital to our endowment portfolio."

During Rothrock's chairmanship, the Texas A&M Foundation Board of Trustees and staff focused on two goals: building the endowment through increased contributions and through good investing. "The Foundation did this extremely well this past year," Rothrock said. "It was a nice time to be chairman! We passed the \$1 billion on the *One Spirit One Vision* campaign and earned double digit returns on the invested capital. So both goals were accomplished."

The California resident has found his involvement with the A&M Foundation to be especially satisfying because of the organization's important mission. "As a state school, A&M, like the others, is faced with dramatic financial constraints. Somehow the notion that government or similar other sources will solve all these financial problems just doesn't work for me," explained Rothrock, who will chair the investment committee for 2006-07. What does work for him is to help lead the Foundation's efforts to build a corpus of private financial resources to decrease "the friction of high cost for people to go to school."

Ray Rothrock is still taking J. Wayne Stark's advice to heart. ♦

—by Dorian Martin '07

WALL STREET JOURNEY

* * *

*Business school grad creates teaching,
research and curriculum fund*

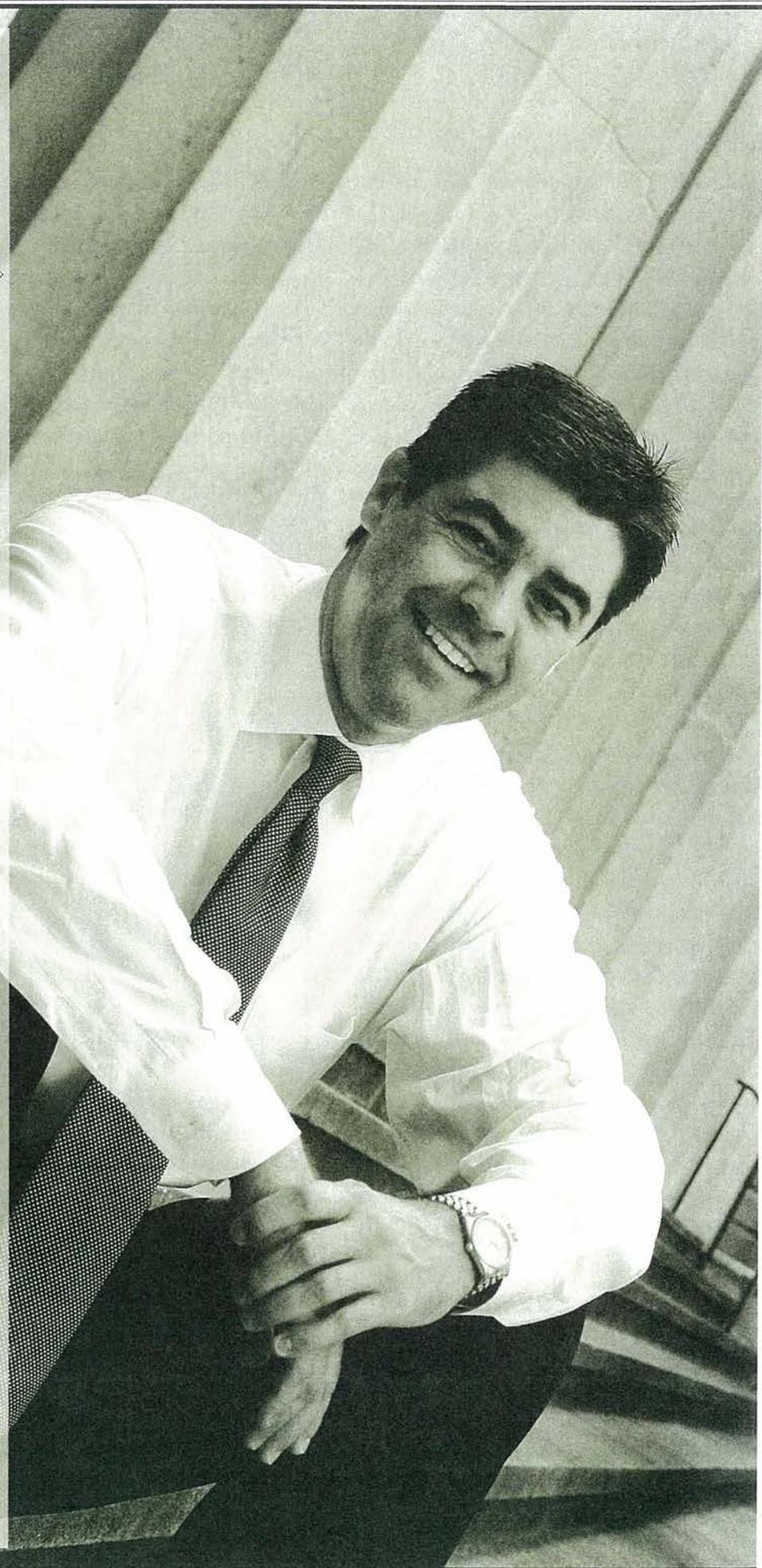
When Craig McMahan '90 sat in finance classes at Mays Business School, he dreamed of a Wall Street career even though he had little exposure to investment bankers. After knocking on doors of the major investment firms in the late 1980s, he found a professional home at Keefe, Bruyette and Woods (KBW), a top New York City investment banking firm that specializes exclusively in financial services industries.

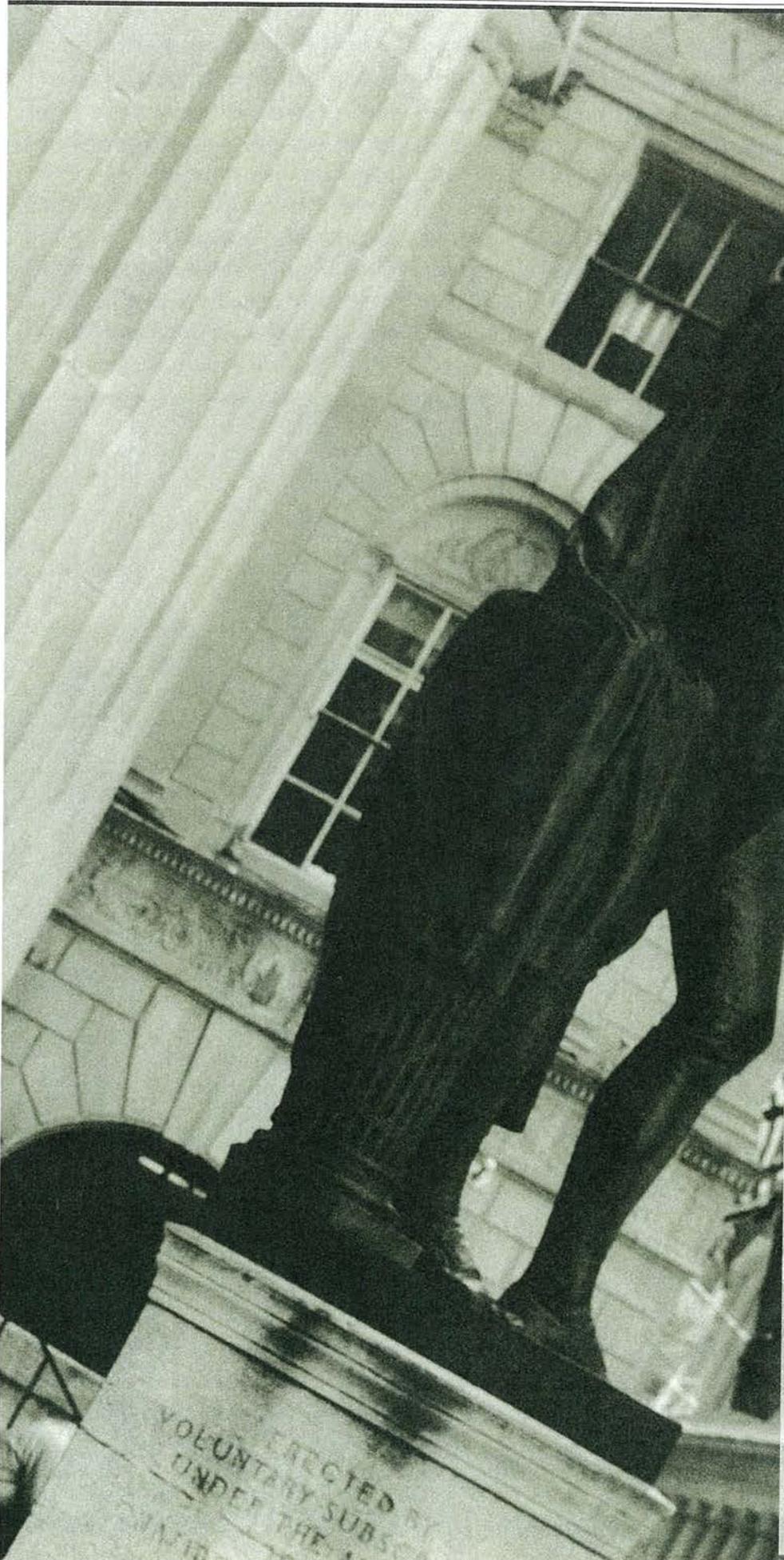
In 1994 the Houston native began donating small amounts—less than \$1,000 annually—to the J. Wayne Stark Endowment Fund. At the same time, McMahan also began to contribute his time by speaking to classes. He also considered how to help Mays students expand their professional horizons.

“Craig is an unusual young man because at an early age, he has given back to the school with his time and his treasure,” said Mays Business School Dean Jerry Strawser. “He sets a wonderful example for other students on how to get meaningfully involved in Texas A&M.”

Thinking about his own undergraduate experience, McMahan recalled limited opportunities to meet Wall Street executives. “They would bring guest speakers in to visit with us that were primarily from banks and accounting firms,” McMahan said, adding that he wanted current and future Aggies to have a cadre of Wall Street financial leaders as a resource.

Working with the Mays administration and other former students who work in Wall Street firms, McMahan actively participates in the “Aggies on Wall Street”





program. Each summer, 25 of the sharpest Mays students meet with leaders from 30 banks, investment banks and money management firms in the nation's financial center. "Craig is a very valuable mentor to our students. He hosts students when they go to New York and shares his experiences of working on Wall Street," Strawser explained. McMahan also has hired numerous Aggies for summer internships and for full-time positions after graduation.

McMahan, now KBW's managing director in investment banking, sees another important outcome emerging from showcasing these outstanding students and recruiting them to Wall Street firms. "This program adds more and more credibility to Texas A&M and its Mays Business School and causes their influence to expand," he said.

Realizing that this prestige also is enhanced through the recruitment of top faculty and the visibility of the school's research, McMahan has committed \$100,000 over a five-year period to create the Craig R. McMahan Excellence Fund. "I never was in favor of donating to a general pool of funds," he said. "If I was going to donate, I wanted to donate to something that would be utilized for the betterment of the business school." Impressed by Mays' current vision toward quality improvement, the Department of Finance Advisory Board member focused the endowment on enhancing and supporting teaching excellence, research excellence and curriculum in finance. The award also will be used to provide an annual teaching and research award to a faculty member.

McMahan believes the growth of this endowment will send a positive message to the Mays community. "It provides one building block in reaching our goal of excellence," he said, adding that he hopes other former students will consider contributing their own building blocks to the school and to the university. ♦

—by Dorian Martin '07 and Sommer Hamilton '04

James C. Jones graduated from Texas A&M University in 2005 with a bachelor's degree in civil engineering and a plan: to find a way to give something back to A&M. While many recent college graduates were still searching for jobs, and others were planning their own lives, Jones decided to leave a legacy.

"Texas A&M has been a part of my life for so long. I felt like now was a great time for me to give back," said Jones. "I wouldn't be where I am today without having gone to A&M. Jones grew up in an Aggie family, so Texas A&M University has been a major influence throughout his life. His grandfather ('43), father ('69), an uncle ('74), a sister ('97) and two cousins ('98 and '01), all graduated from Texas A&M. Several other family members also attended Texas A&M along the way.

In December of 2005, Jones donated \$50,000 to establish an endowed scholarship in the Zachry Department of Civil Engineering. By establishing this scholar-

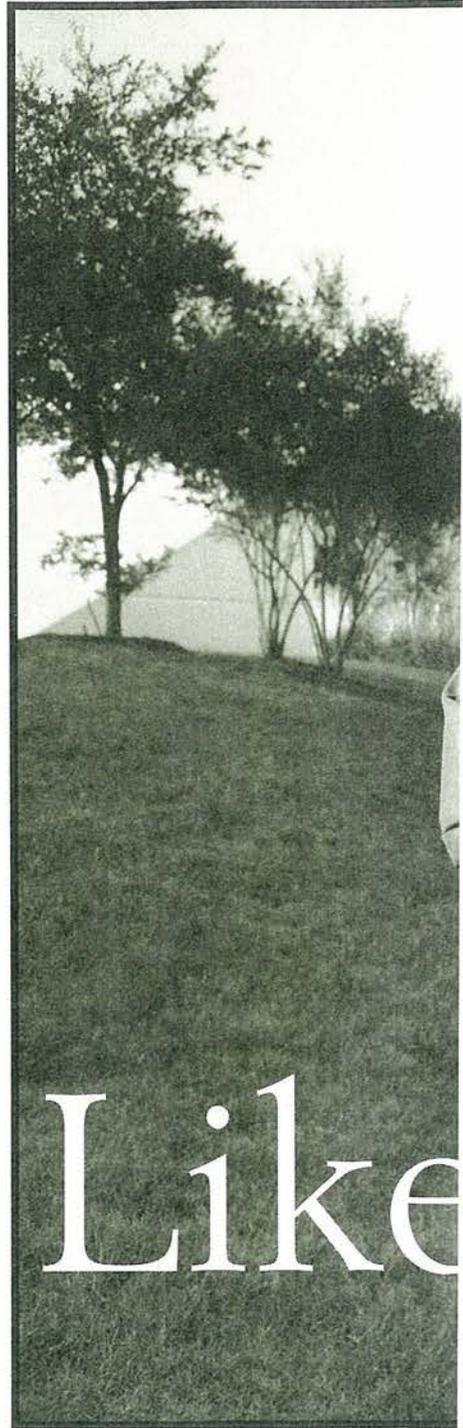
ship, Jones has enriched the education of future civil engineers that will follow him at Texas A&M University for years to come.

Working with the Texas A&M Foundation, Jones was able to design the scholarship with several unique selection criteria to encourage industrious students.

"This particular scholarship is a reward for a senior-level student who works hard, possibly by taking a heavy course load, doing an internship or co-op, but maybe doesn't have the best grades," said Jones.

The scholarship's emphasis is based on helping a student who displays a strong work ethic rather than need alone. Jones himself worked at Jones & Carter during the summers and holidays since age 14 and graduated from Texas A&M in four years. He often took upwards of 17 hours per semester, which is an accomplishment in itself considering the difficulty of the engineering curriculum. Most engineering students take a course load of between 12 and 15 hours per semester.

"James' gift is an extraordinary example of the Aggie Spirit. His gift to the department, coming so soon following his own graduation from A&M, represents his commitment and investment in our future. Through his generous gift hard-working students will be assured access to a civil engineering degree from Texas A&M University," said Dr. David Rosowsky, holder of the A.P. and Florenc Wiley Chair and department head.



Like

No
Time
the Present

After Jones received his diploma, he immediately went to work for Jones & Carter Inc., a full-service engineering firm, fulfilling a lifelong dream. This opportunity opened the door for him to give something back to the school he loved.

It is clear that generosity runs in the Jones family. Jones' father, J.R. (Bob) Jones '69 also established an endowment, recognizing teaching excellence in civil engineering, and is the *One Spirit One*

Vision Campaign chair for the Zachry Department of Civil Engineering.

"James comes from an extraordinary Aggie family and is continuing in their spirit of giving back to A&M," said Rosowsky. "We are grateful to James and his family for all they have done and continue to do for civil engineering at A&M." ♦

—by Mary Ann Rogers '07



ONE SPIRIT
A&M
ONE VISION

ONE SPIRIT ONE VISION CAMPAIGN
IN THE HOME STRETCH

As of July 31, 2006, with only five months remaining in the drive, former students and friends of Texas A&M University had given \$1.3 billion as part of the *One Spirit One Vision Campaign*.

Giving during the campaign can take many forms, depending on what works best for each individual or organization. Donors may choose to make a current gift in the form of cash, securities, real estate or a multi-year pledge. They also may choose to plan a future gift such as a bequest, charitable trust or gift annuity, or may designate the Texas A&M Foundation as a beneficiary of a life insurance policy or retirement account.

Donors can designate gifts to the Texas A&M Foundation for use by any college, department or program, for a variety of scholarships, professorships, chairs and fellowships, or for capital improvements on campus. Each investment in academics at Texas A&M builds on the Aggie Spirit. Each investment is a legacy in a cycle of philanthropy that dates back generations.

For example:

- Dr. James R. Saunders Jr. '41 completed a \$3 million testamentary charitable remainder unitrust to establish a chair in the College of Veterinary Medicine and Biomedical Science.
- George P. Mitchell '40 gave \$1.25 million to support collaboration between Cambridge University and Texas A&M in cosmology.
- Charles H. Gregory '64 completed a \$2 million bequest for the College of Liberal Arts.
- William H. Flores '76 completed a \$3 million bequest to establish three endowments: one for the unrestricted use of the President's Office; the second for the Mays Business School; and the third for The Association of Former Students.

This remarkable seven-year fund-raising effort will end on Dec. 31, 2006. The Texas A&M Foundation plans to celebrate its success and finale on campus March 30, 2007. Invest in academic excellence at Texas A&M and be part of the *One Spirit One Vision Campaign* by contacting the Texas A&M Foundation at 800-392-3310.

NEW YORK REAL ESTATE INVESTOR
JOINS BOARD OF TRUSTEES



Thomas J. Saylak '82, president of Merrill Lynch Global Commercial Real Estate in New York City, has been appointed to the Texas A&M Foundation Board of Trustees. Saylak, who grew up in Bryan, has been a special

advisor to the Foundation's Investment Advisory Board for five years. At Merrill Lynch, he oversees real estate investment banking, commercial mortgage lending and principal investing activities worldwide.

Saylak was the 2001 Mays Business School Outstanding Alumnus, has hosted the Aggies on Wall Street program, and is a dedicated supporter of Texas A&M's Singing Cadets. He also is a member of The Association of Former Students' Endowed Diamond Century Club.

"Becoming a trustee of the Texas A&M Foundation presents me with a wonderful way to merge my business experience and philanthropic interests," he said. "The mission of the Foundation is critical to the future of Texas A&M University, and I look forward to contributing in any way I can."

Saylak graduated magna cum laude with a bachelor's degree in business administration from Texas A&M, and earned a master's degree in business administration in 1987 from the Harvard Graduate School of Business Administration, where he graduated with high academic distinction as a Baker Scholar.

He replaces outgoing trustee Robert Harvey, whose term ended on June 30. His appointment was effective July 1. The new chairman of the board is Jerry Cox '72 and the president-elect is Bob Surovik '58.

IT'S A GREAT DAY TO BE AN AGGIE

The Texas A&M Foundation appreciates and acknowledges the service and example of Ed Solymosy '60, who retired in June 2006 after six years of service.

As director of development for student affairs, Solymosy matched the interests of former students and friends with a variety of student programs at Texas A&M, such as the Corps of Cadets, Memorial Student Center and Student Counseling Service, to name a few. Solymosy also served as the Houston area representative for the Foundation, and is a member of several advisory boards at Texas A&M University.



To date, due in large part to his enthusiasm and untiring efforts, the *One Spirit One Vision Campaign* has raised more than \$51 million for the Corps of Cadets and the Division of Student Affairs—a legacy that will benefit Aggies for generations to come.

Solymosy was born in Budapest, Hungary. He holds bachelor's degrees in engineering and business administration, and a master's degree in business administration from Texas A&M. He served in the U.S. Army until 1991, attaining the rank of brigadier general. He held positions with the U.S. Department of Defense and Army at the highest levels of command and staff, in the United States and abroad—including Vietnam, Germany and Greece.

"Ed Solymosy has dedicated his life to service," said Jim Palincsar, senior vice president for development of the Texas A&M Foundation. "He has served his country and university with distinction. While working at the Texas A&M Foundation, Ed showed he was a

person of high ideals and demanding standards. He is truly a role model for all. Many of us at the Foundation will remember his motto, 'It's a great day to be an Aggie!' "

FOUNDATION WELCOMES NEW GIFT OFFICERS

Will Fusselman '95 joined the Office of Gift



Planning staff in April. He secures planned gifts of bequests, trusts, life insurance and other giving methods from Aggies in Houston, the surrounding territory and the southeastern states. Fusselman also promotes membership in the Foundation Planned Giving Council, a volunteer group composed of accountants, attorneys, financial planners and other estate planning professionals.

Fusselman is an attorney who worked in private practice for six years after completing a clerkship with the Court of Appeals in Houston. He earned his bachelor's degree in finance from Texas A&M in 1995 and his law degree in 1999 from Texas Tech School of Law. He and his wife, Megan, have five children: Clare (7), Joe (6), Ellie (3), Sofia (2), and Thomas, who was born Aug. 28.



Lee Ann Knox '02 joined the Foundation as assistant director of development for the agriculture programs. She assists in the fund-raising efforts for the College of Agriculture and Life Sciences, the Texas Agricultural Experiment Station, and the Texas Cooperative Extension.

A native of Arp, Texas, Knox earned her degree in agricultural development and for three years served as the legislative assistant to State Rep. Robert L. "Robby" Cook in Austin. She and her husband, Jeff, married in December 2005.

Philosopher Philanthropist

HOUSTON ATTORNEY FUNDS HUMANITIES RESEARCH FELLOWSHIPS

Even as a student at Texas A&M University, Wyoming native Corey Brown '92 realized who was responsible for his education: the citizens of Texas and former students of Texas A&M.

"I took good advantage of that education and felt like I got some real benefits," Brown said. "I decided I would contribute as early as I could. Supporting Texas A&M University by giving to the Texas A&M Foundation is the best way for me to express my gratitude."

Now an attorney with an international law firm headquartered in Houston, Brown is funding \$25,000 for graduate fellowships in the Melbern G. Glasscock '59 Center for Humanities Research at Texas A&M.

The lower cost of a public university education has made it easier to start giving back to his alma mater, Brown said. He had considered attending a private college, but the Wyoming native knew he would get just as good an education at Texas A&M, and now he doesn't have an overwhelming debt to repay. "I had a head start by not being saddled with that debt," he said.

Part of his philanthropy to Texas A&M is serving on the Glasscock Center's Development Council, and he has followed activities and attended functions for years in the College of Liberal Arts. "I've always been interested in the humanities," Brown said. "The Texas A&M Foundation recognized that interest and encouraged it. This was just the right thing to do."

The Glasscock Center fosters the humanities and humanities research among the community of scholars at Texas A&M and in the world beyond the academy. The center is named for Susan M. and Melbern G. Glasscock '59, whose gift in 2002 created a sustaining endowment for the center.

Some of the studies funded by the humanities center include research into how storytelling helps form identity, how democracy works, and even how fashion operates in literary novels.

Brown credits a meeting with longtime Texas A&M philosophy professor Stephen Daniel with his decision to major in philosophy. "Dr. Daniel showed me the results of a study that indicated philosophy majors scored higher on the LSAT (Law School Admission Test)

than any other major," Brown said. "He helped me understand that the study of philosophy also had professional benefits."

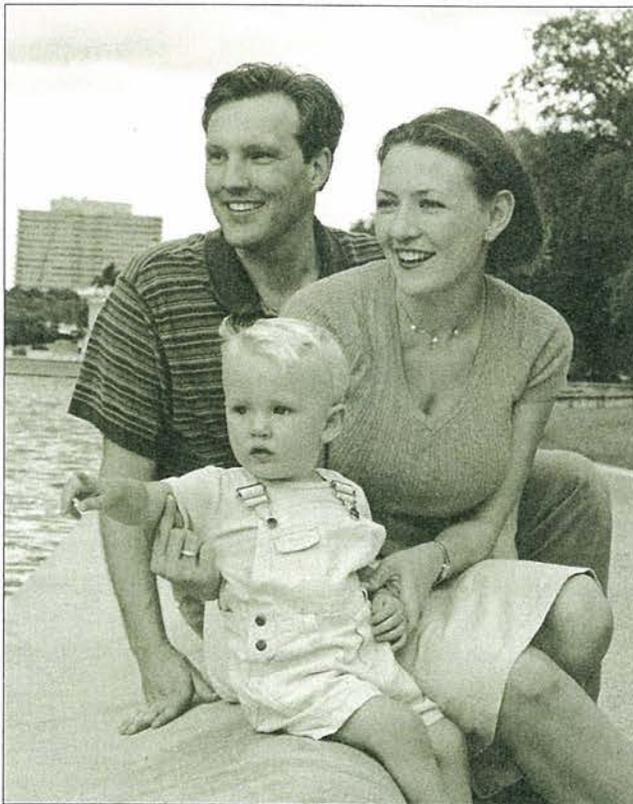
One surprise for Brown is that he has a rewarding career in a field he didn't even consider as an undergraduate at Texas A&M in the 1990s: litigation. "I didn't realize this whole industry even existed back then," Brown said.

Now a corporate attorney for Bracewell & Giuliani in Houston, Brown describes his work—mergers and acquisitions—as the positive side of practicing law. "I help people build their businesses by entering into

agreements with other business people," Brown said. "My job allows me to work with motivated and highly competent people to achieve a mutually satisfactory result."

In addition to his rewarding professional career, Corey revels in a new personal love. He and his wife, Maggie—a Vassar graduate who studied Russian—are parents to 1-year-old Toby. "Fatherhood has made me feel a greater sense of responsibility, a sense of higher purpose," Brown said. "The best parts of my day are when I wake my son in the morning and put him to bed at night." ♦

—by Mike Downey



Frequently Asked Questions

How can I support a scholarship or program at Texas A&M University if I don't have the cash flow at this time in my life to make a large donation?

It's easy. Just find out which scholarship or program you want to support and contact the Texas A&M Foundation at 800-392-3310. When you call, we'll connect you to a gift officer who can help you complete a simple payment plan. You decide how much you would like to contribute. You can use electronic fund transfer to send your gifts directly and automatically from your checking or savings account. Over time, your small contributions can add up to significant support for a special student, professor or program. The Foundation does not take on-line payments at this time, so payments must come in by check or electronic fund transfer. You also can make an unrestricted gift to the Texas A&M Foundation.

Find it on the Internet

Learn more about topics related to this issue of *Spirit* by visiting these Web sites:

Life Insurance In-Depth

<http://www.lifeinsuranceindepth.com/charitable-giving.html>

The Society of Young Philanthropists

<http://www.philanthropysociety.org>

Chronicle of Philanthropy: Connecting with Generation X

<http://philanthropy.com/premium/articles/v17/i12/12003301.htm>

One Spirit One Vision: Find Your Favorite Program

<http://giving.tamu.edu/8spirit>

The Melbern G. Glasscock Center for Humanities Research

<http://glasscock.tamu.edu>

Donors of the Future Knowledge Center

http://www.givingforum.org/dof/resources_newdonors.htm

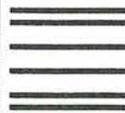
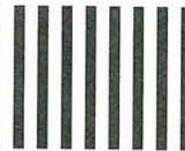
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Other: _____

You can contact the Texas A&M Foundation at the following:

- postal: 401 George Bush Drive, College Station, Texas 77840-2811
voice: 979-845-8161 or 1-800-392-3310
e-mail: amfoundation@tamu.edu
internet: http://giving.tamu.edu/lspirit



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