



*Spirit of*

OFFICE OF GIFT PLANNING MAGAZINE • SUMMER 2019

# SHARING

## TAKING FLIGHT

Dr. Janice Boyd '86 found a passion for parrots that inspired her planned gift for the Schubot Exotic Bird Health Center.

# The Right Gift for You



As researcher Brené Brown says, “It is not joy that makes us grateful; it is gratitude that makes us joyful.” In previous letters, I’ve written about some of the reasons I’m grateful to be president of the Texas A&M Foundation. It isn’t hard to find joy when I get to work with people committed to changing the world for the better through their work at Texas A&M University. When I step back and look at how everyone around me is working toward our school’s ambitious vision of goodwill, it is easy for me to reciprocate those efforts.

I often sense that same gratitude in donors when they talk about giving students opportunities because they were given opportunities in their past. In turn, we want to acknowledge donors’ support by giving them the time and attention they deserve. That’s why we prioritize collaborating with givers to create customized planned gifts that fit their financial needs as well as the needs of Texas A&M. There’s no one-size-fits-all option; our planned giving officers can

help you explore the wide variety of available giving methods to single out what’s right for you.

Some donors, such as those featured in this edition of Spirit of Sharing, have found it best to give through their retirement accounts. There are a few different types of retirement gifts, each offering its own benefits to fit your unique situation. A beneficiary designation gift allows you to continue using your retirement account during your lifetime, while a testamentary unitrust allows you to distribute your earnings to family members first before giving to the university. Ultimately, every type of gift is a means to the same end: strengthening Texas A&M in its mission to transform the state, nation and world.

In this issue, we’ve included a helpful, in-depth guide to retirement giving that outlines each method’s unique characteristics. As you read that guide along with stories of other selfless givers who used retirement gifts to leave a unique impact on Texas A&M, consider if you would like to do the same. Our team is always grateful for your generosity, and we’re ready to work with you to create the perfect gift.

*Thanks for all you do.*

Tyson Voelkel '96  
President, Texas A&M Foundation



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Visit our planned giving website to learn how you can make a gift to Texas A&M and to read the most recent planned giving news.



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*The Rec Sports' Outdoor Adventures program, which offers hiking, kayaking and other trips, is thriving thanks to the legacy of Patsy Kott '90. Pg. 4*

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# WOMEN, WEALTH & WISDOM

Everyone has a legacy. Yet, it's the decisions we make while alive that determine what that legacy will be after our lifetime. In many cases, women face a variety of unique challenges when it comes to these decisions. As a result, the Texas A&M Foundation began hosting the Women, Wealth & Wisdom workshops in 2012. Created by women and for women, the workshops provide the necessary tools to navigate life's financial uncertainties with renewed confidence.

As many as nine out of 10 women will be solely responsible for their finances at some point in their lives. Women live longer than men, and with that longer life comes additional planning concerns to consider, such as ensuring their assets can last for a longer period and being the ultimate decision-maker on all estate decisions. This makes estate planning a crucial part of every woman's retirement and financial planning.

Women, Wealth & Wisdom workshops are free annual events featuring informative breakout sessions and inspiring keynote speakers. Originally started in College Station, the workshops have since expanded to Dallas, Houston and San Antonio. There is something for everyone—from beginner finance topics to specialized topics for women in transitional life stages. Regardless of your situation, the Texas A&M Foundation hopes you'll consider attending a future workshop and joining the growing group of strong, knowledge-seeking women who are taking charge of their finances.

To learn more about Women, Wealth & Wisdom workshops or to find a workshop in your region, visit [give.am/WWW](http://give.am/WWW) or contact Angela Throne '03 at [athrone@txamfoundation.com](mailto:athrone@txamfoundation.com).

## BY THE NUMBERS

How women have impacted the *Lead by Example* campaign through planned gifts  
(Jan. 1, 2012 to present)

**677** planned gift intentions totaling **\$188 million**

The three most popular giving methods:

- 429** bequests
- 98** retirement accounts
- 67** charitable remainder unitrusts

**\$37 million** to Texas A&M from the estates of **137 women**

Lydia "Dia" Copeland



# WORKSHOP INSPIRES GIVING

When a major loss threatened the stability of Lydia "Dia" Copeland's estate, she knew she needed to find a way to secure her future finances. A few weeks later, Copeland attended one of Texas A&M Foundation's Women, Wealth & Wisdom workshops. Through the speakers and breakout sessions featured at the event, Copeland found the financial advice and assurance she needed, learning not only how to care for her estate, but also how to use her assets to serve others.

"Being around a group of women who were genuinely committed to learning and caring for others felt so empowering," she said. "During the conference, I was struck by how much Texas A&M University gives to the entire Brazos Valley. I felt like the attendees were being invited to join in on giving back."

Inspired by the workshop and wanting to act on her passion for the health sciences, she began to consider financial ways of giving. Copeland found that a planned gift was the best way to make her goals a reality.

By naming the Texas A&M Foundation as beneficiary of her retirement account, Copeland's gift will establish an excellence endowment for the Health Science Center and a scholarship for health administration students in the School of Public Health.

"Seeing the impact that health students have on their broader community prompted me to support these areas," said Copeland, who enjoyed a career in nursing. "I hope my gifts allow students to develop and share their talents as they care for their future patients."



*A Lifetime of*

# ADVENTURE

Patsy Kott '90 championed the Rec Sports' Outdoor Adventures program. Now, a scholarship in her name supports students who share her same bold spirit. **By Taryn Woody '19**

To the late Patsy Kott '90, the world was a big, blank palette awaiting exploration. A hiking and outdoors enthusiast, she possessed an adventurous spirit and a deep sense of wanderlust—best reflected in her frequent world travels and 31-year career with Rec Sports at Texas A&M University, where she made it her life's mission to bring the outdoor world to Aggie students.

In 1985, Kott initiated TAMU Outdoor, now called Rec Sports' Outdoor Adventures. It was one of the first university outdoor recreation programs in the state, and she remained its leader until her retirement in 2013. "Patsy was passionate about getting students access to outdoor recreational sports," said Jason Kurten '98, who now directs Outdoor Adventures. "She convinced Rec Sports leadership to fund an adventure program that could offer backpacking, canoeing, rock climbing, paddle boarding and similar outdoor activities."

Outdoor Adventures remains a mainstay of Rec Sports today, offering a wide range of classes and educational programs for Aggies. The program also organizes camping, hiking, rock climbing, kayaking and other outdoor trips, which are available for both students and members of the Bryan-College Station community.

## GIVING BACK TO THE WORLD

Kott's dedication to the outdoors and selfless service guided her time at Texas A&M. "She instilled the

Aggie core values and the concept of giving back in her staff," said James Welford, development director for Rec Sports. She also routinely mentored students pursuing careers in outdoor recreation, including Kurten, who initially served as a student staff member under her. In her free time, she volunteered with Habitat for Humanity and the Eels on Wheels program, which helps people with disabilities gain their SCUBA diving certification.

When she wasn't working or volunteering, Kott traveled: During her lifetime, she visited six continents and hundreds of countries. When Kott retired, the Department of Recreational Sports honored her legacy by creating an endowed scholarship in her name for student staff members in the Outdoor Adventures program.

After Kott's passing in 2015, the department received a bequest from her estate to add to the endowment. Now, thanks to her contribution, the Patsy Kott Outdoor Adventures Scholarship is awarded every year to a student worker in the program who demonstrates the same level of commitment and passion as Kott.

Through the memorial scholarship and countless stories of her impact, the Outdoor Adventures staff and student workers remember Kott's legacy. "I continually see her influence on the students I work with," Kurten said. "When Aggies hear stories about Patsy, they are inspired to live boldly in the same way that she did. She encouraged people to seek adventure, to spend time exploring the outdoors, and to just get out there and live life. Today, I see our students living in her spirit."



*Patsy Kott '90*

*Patsy Kott '90 made a bequest, or a gift in her will, to benefit Texas A&M. To make a bequest, you can designate the Foundation as a beneficiary of your estate plan. A bequest can be made as a percentage of your estate, a specific asset, or the balance or residue from your estate. Benefits include the ability to retain assets during your lifetime, lessen the burden of taxes on your family and support a Texas A&M area of your choosing.*

To learn more, contact Angela Throne '03 at [athrone@txamfoundation.com](mailto:athrone@txamfoundation.com) or (979) 845-5638.

# TAKING FLIGHT



Dr. Janice Boyd '86 found a passion for parrots that inspired her planned gift for the Schubot Exotic Bird Health Center.

By Bailey Payne '19



## How exactly does one find themselves researching exotic parrots?

For Dr. Janice Boyd '86, it started with choosing a parrot as her new pet. "I had always liked cats," Boyd said, perusing the shelves of books and scientific journals in her office. "I toyed around with the idea of conducting feline research. But cats sleep all the time, and parrots move all the time!"

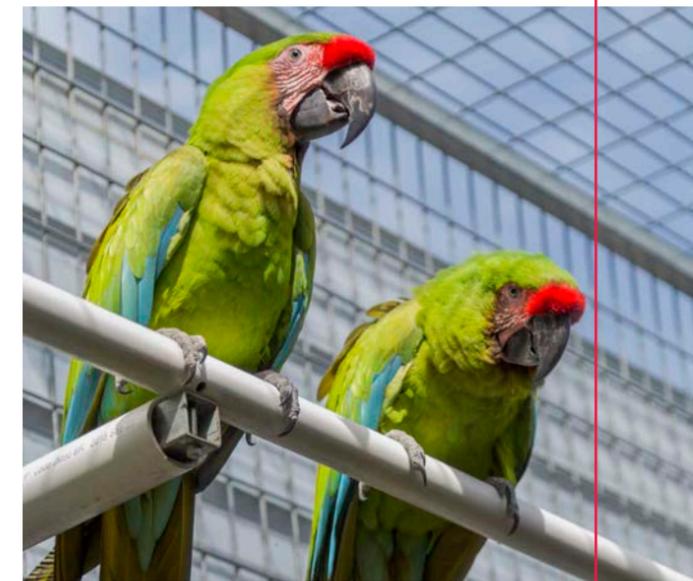
She bought her first parrot, an African grey, and was fascinated by the bird's intelligence and eccentric behavior. About a year later, she bought another parrot, a vibrant green Amazon. Slowly but surely, her collection grew and her curiosity deepened. Today, Boyd cares for four parrots as pets and more than 30 great green macaws as part of her research. She maintains one of the largest breeding collections of great green macaws in the United States.

When Boyd isn't interacting with her macaws, she conducts research at Texas A&M University's Schubot Exotic Bird Health Center in the College of Veterinary Medicine & Biomedical Sciences. Her passion for all things psittacine—or anything pertaining to parrots—has taken her to dozens of countries and ingratiated her amongst similarly passionate peers. But for her, it's not enough to do what she loves without making a difference. That's why she's leaving a planned gift of retirement and investment accounts for the Schubot Center so avian research can take flight for decades to come.

## OUT OF THE NEST

Boyd was four years old when her family moved to Los Alamos, New Mexico, in 1950. While her father worked in the famous Los Alamos National Laboratory, she found her love for nature and wildlife in the foothills of the Rocky Mountains. Years later, she enrolled as an undergrad at the University of Michigan studying physics and mathematics. She wasn't sure what to do immediately after graduation, so she took a programming job working under Dr. Carl Wunsch, a prominent oceanographer at the Massachusetts Institute of Technology.

Working with Wunsch set Boyd on a career path in studying the sea. She earned her Ph.D. in oceanography at Texas A&M in 1986 and held a 20-year position at the Naval Research Laboratory in Mississippi.



The job was good, but as the years went by, Boyd found herself ready for something new.

Around the same time, she adopted her first pet parrots. Soon after, she left her federal job behind for a part-time position that would allow her to visit parrot conservation areas in Central and South America. One of those areas was the Tambopata Research Center in Peru, where she first met Dr. Donald “Don” Brightsmith, who would become a long-time colleague, in the early 2000s. Boyd eagerly collaborated with Brightsmith on a few research projects, including a multiyear study that used tracking collars to monitor wild parrots’ migration patterns. “She’s tenacious,” Brightsmith said of Boyd. “Once she gets on a project, she keeps working on it and makes sure that collaborators stay on track until it’s done.”

Boyd continued to work in oceanography but periodically took unpaid leave to return to her work with parrots. Brightsmith, in the meantime, had found his way to the Schubot Center at Texas A&M, where he is now an associate professor in the Department of Veterinary Pathobiology. In the summer of 2011, Boyd decided she was ready to leave oceanography for good and reconvene with Brightsmith in College Station.

## BIRDS OF A FEATHER

The Schubot Exotic Bird Health Center in the Department of Veterinary Pathobiology was founded in 1987 with a generous endowment from avid aviculturist Richard M. Schubot. Having made his living as a

franchisee for Sheraton Hotels and McDonald’s Corporation, Schubot found a passion for parrots after taking one in as a pet in 1981. During the next 12 years, he took heed of threats to exotic bird populations and sought to make his own strides in conservation. “Yes, I realize I can’t save all the birds in the world,” Schubot wrote, “but I can do my share to help.”

In 1993, Schubot passed away after a long battle with liver disease. Boyd, Brightsmith and the team of researchers at the Schubot Center honor his legacy by investigating obstacles, seeking solutions and exploring behaviors behind some of the most beautiful and misunderstood land animals on the planet.

Boyd’s research specifically focuses on the genetic makeup of *Ara ambiguus*, commonly known as the great green macaw. Native to neotropical rainforests, the great green macaw is an endangered parrot species aesthetically similar to the military macaw—so similar, in fact, that they are often confused for one another in areas where their populations overlap.

After she moved to Texas, Boyd purchased her own breeding colony of great green macaws in the interest of conducting critical niche research. “I wanted to discover my macaws’ ethnic heritage, how closely related they were to military macaws and if there were any genetic hybrids between the two,” she said.

So far, her work has been successful, but slow. “Genetic studies are pretty complicated!” Boyd laughed. Though she intends to publish her findings through the Schubot Center, decades of frugal

living and smart saving have allowed her to completely self-fund her great green macaw studies.

## ON A WING AND A PRAYER

Boyd doesn’t just want to do what she loves in working with parrots; she wants to leave behind a legacy. “I want to give back to both the human world and the natural world,” she said. By naming the Texas A&M Foundation as beneficiary of her retirement and investment accounts, she will establish an endowment to grant \$65,000 for every pet parrot she has at the time of her passing to benefit the Stevenson Companion Animal Life-Care Center, a unique retirement home for pets in Texas A&M’s veterinary college.

After her parrots’ lifetimes, the endowment will be combined with the Dr. Janice D. Boyd ’86 Endowment for Psittacine Conservation and Health to benefit the Schubot Center in perpetuity. “In creating this gift, I hope to follow in Richard Schubot’s footsteps by allowing more research to be done with parrots,” she said.

Boyd still owns her first African grey, Paula, who inspired her to study parrots more than 25 years old ago (the species can live between 40 to 60 years in captivity). Her love and care for her own animals mirrors her passion to protect those in the wild. Through every step of her life, Boyd’s sincere admiration for the magnificent workings of the natural world has remained steadfast. With her gift to the Schubot Center, that admiration can be assured of taking flight.

*Janice Boyd ’86 used a retirement account beneficiary designation gift to support the Schubot Exotic Bird Health Center. This method of giving is among the most flexible of all charitable gifts. Benefits include the ability to continue to freely use your account, lessen the burden of taxes on your family and support a Texas A&M area of your choosing.*

*To learn more about making a planned gift using your retirement or investment accounts, contact:*

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*To learn about making a gift to support the Schubot Exotic Bird Health Center, contact:*

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“I want to give back to both the human world and the natural world. In creating this gift, I hope to follow in Richard Schubot’s footsteps by allowing more research to be done with parrots.”

—DR. JANICE BOYD ’86



## The Benefits of Giving

# RETIREMENT ACCOUNTS

There are many planned giving options that allow you to tailor a gift to your unique needs and interests while ultimately benefiting Texas A&M University. Making a retirement gift is one of the most diverse and flexible options available.

Check out these three retirement gift methods to see if they might be right for you!

### 1 BENEFICIARY GIFT

Beneficiary designation gifts are a simple, flexible and affordable way to give to Texas A&M. You can designate the Foundation as a beneficiary of your retirement account, which allows you to support the causes you care about while retaining the ability to use your account for as long as you need. To make a beneficiary designation gift, simply contact your account custodian and ask them to send you a new beneficiary designation form on which you can designate the Foundation. After your lifetime, your account will transfer to the Foundation.

Christian Martin '19, one of six recipients of an industrial engineering scholarship established through a retirement account gift by the late Dr. Bonnie Hunt '77, is grateful for her legacy.

“

**This scholarship is helping me graduate without college debt. I'm honored that Bonnie Hunt's gift is supporting my engineering degree.**

—Christian Martin '19



### 2 TESTAMENTARY UNITRUST

Known as the “give it twice” unitrust, this planned giving method is a popular option that allows you to transfer your IRA or other assets at death to fund a charitable remainder unitrust. It's called a “give it twice” trust because the trust first pays income to your family for a number of years before distributing the remaining balance to the Foundation.

Jere Cyrus and Jack H. Smith '64 decided to create a planned gift using a testamentary unitrust. When funded after their lifetimes, the Smith's trust will make annual lifetime payments to the couple's three children, plus payments to their two grandchildren for a term of 20 years. At the termination of the trust, the remaining assets will support Texas A&M University at Galveston and students in its marine transportation program.

“

**I was the first in my family to go to college, and I couldn't have done that without a little help. Supporting these students is important to us.**

—Jack H. Smith '64

### 3 IRA CHARITABLE ROLLOVER

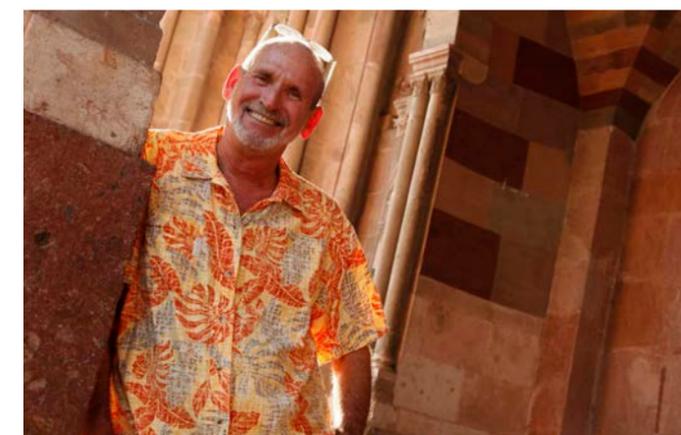
If you are 70 ½ or older, you may be interested in lowering the income and taxes from your IRA withdrawals. An IRA charitable rollover gift allows you to avoid taxes on IRA withdrawals, satisfy your required minimum distribution for the year, reduce your taxable income and make a gift to Texas A&M that is not subject to the 50 percent deduction limits on charitable gifts. By simply contacting your IRA plan administrator and designating a gift be made to the Foundation, your IRA funds will be transferred immediately to benefit the university.

Hal Schade '67 learned that he could give up to \$100,000 annually using an IRA charitable rollover gift, which would also cover his minimum distribution.

“

**This provides me with the opportunity to support students and programs in the College of Science and College of Geosciences immediately.**

—Hal Schade '67



Pet

# PARADISE

A bequest supports a unique retirement home for pets in the College of Veterinary Medicine & Biomedical Sciences.

Linzy Woolf '01 knows firsthand the importance of preparing for the future and supporting causes you're passionate about. As director of development for the College of Veterinary Medicine & Biomedical Sciences at Texas A&M University, Woolf has spent more than four years fundraising for programs and scholarships. While redoing her estate plans, she began to wonder about her beloved golden retriever, Ella, and what would happen to her should Woolf suddenly pass away. The answer? The Stevenson Companion Animal Life-Care Center, which gives animals second chances after their owners can no longer care for them.

A privately-funded, state-of-the-art animal care program, the Stevenson Center provides for the physical, emotional and medical needs of animals whose owners have entered retirement homes, been hospitalized or predeceased a pet. The center includes six yards for dogs to receive sunshine and exercise, while cats can travel through strategically placed windows that prevent dogs from entering. All residents receive scheduled bathing and grooming, and nutritional concerns are monitored for those with special needs. "It truly is a home," Woolf said. "My endowment will make sure that Ella's taken care of, or if Ella passes away before I do, my gift holds a spot for any animal that I have."

Woolf graduated from Texas A&M with a bachelor's degree in animal science while competing for the equestrian team. After pursuing a career in coaching, she started at the Texas A&M Foundation in 2014. "I enjoy interacting with former students and friends of the university," she said. "Often, people graduate and lose that connection with academics and other programs. I love reminding them of what makes Aggieland so special."

Woolf included her gift through a bequest in her will. To make a bequest, you can designate the Foundation as a beneficiary in your estate plan. A bequest can be made as a percentage of your estate, a specific asset or the balance from your estate. Bequests give you the ability to retain assets during your lifetime and lessen the burden of taxes on your family. "You never know what life will bring," Woolf added. "Making this gift solidifies my wishes for both my finances and Ella after I pass, and it gives me peace of mind."

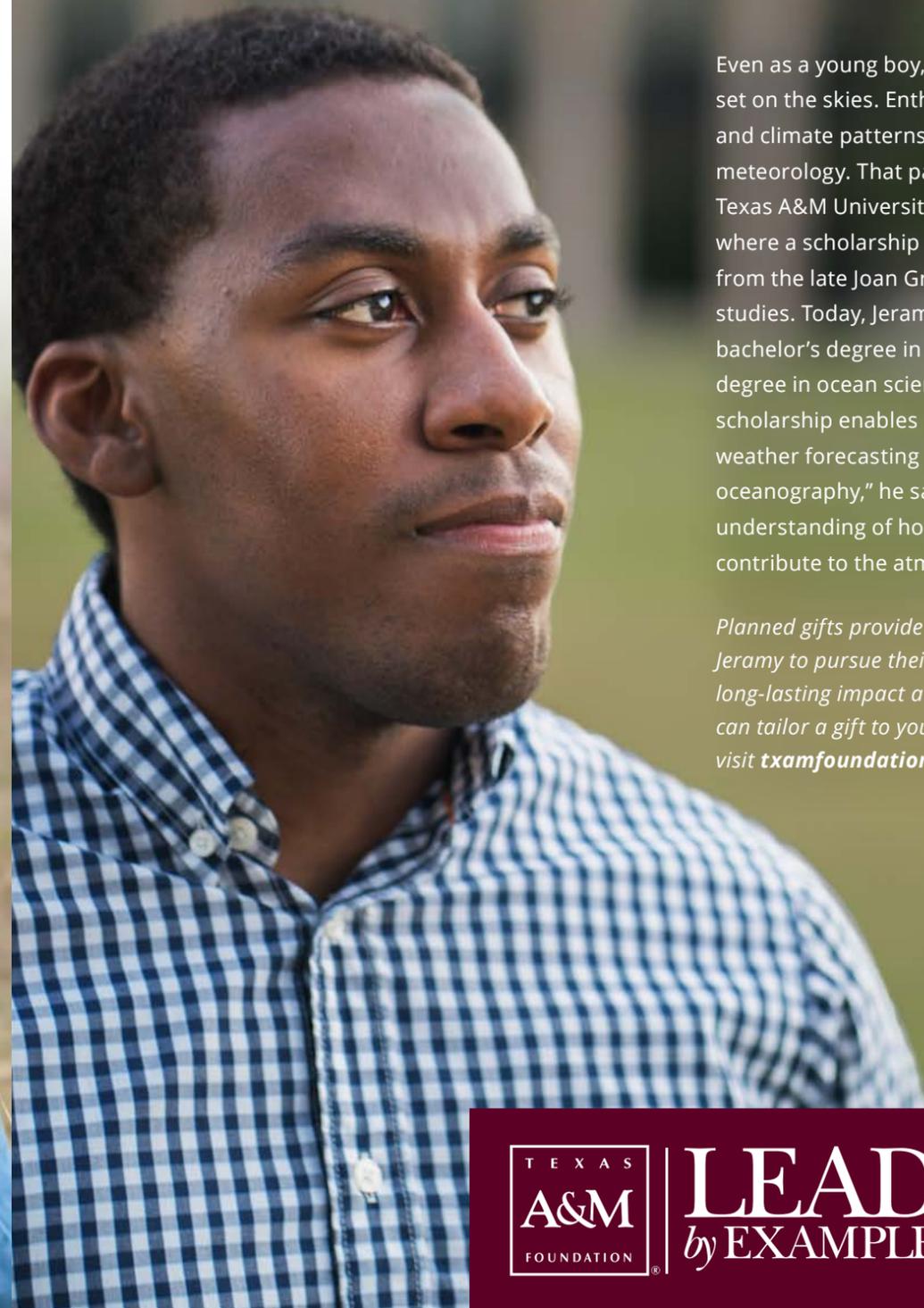


He's destined to be a

# FORECASTER

Even as a young boy, Jeremy Dedrick '18 had his eyes set on the skies. Enthralled by severe weather events and climate patterns, he developed a keen interest in meteorology. That passion led him to study at Texas A&M University's College of Geosciences, where a scholarship established by a planned gift from the late Joan Griffiths allows him to focus on his studies. Today, Jeremy is simultaneously pursuing a bachelor's degree in meteorology and a master's degree in ocean science and technology. "This scholarship enables me to study everything from weather forecasting and air pollution to oceanography," he said. "I hope to gain a better understanding of how climate affects our planet to contribute to the atmospheric sciences field."

*Planned gifts provide opportunities for students like Jeremy to pursue their calling and leave a long-lasting impact at Texas A&M. To learn how you can tailor a gift to your unique needs and interests, visit [txamfoundation.com/plan](http://txamfoundation.com/plan).*



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## A Look Back

# 1921

### A Mother's Love

*In September 1921, Harold Peoples started his freshman year at Texas A&M University. Strict regulations prevented him and the nearly 1,800 men from interacting with very little outside of their professors and fellow students. It didn't take long for Harold's mother, Mrs. Ada Brooks Allen Peoples (front row, fourth from the right), to become concerned. In February 1922, after a visit to College Station where she met with students, she organized the first Texas A&M Mothers' Club with 11 other interested mothers. The club's objective was, "To contribute in every way to the comfort and welfare of the boys and to cooperate with the faculty of the college in maintaining a high standard of moral conduct and intellectual attainment." The idea spread rapidly, and eight clubs became a Federation in 1928. Today, 122 Aggie Moms' Clubs still share the same objective—that of banding together for the benefit of the Texas A&M student body, in many cases through financial support.*



Photo of 1926 Federation courtesy of Cushing Memorial Library and Archives.