Established through an estate gift, the Benz School of Floral Design educates students on the sophisticated art of floral arranging.
Every day, I find myself humbled by the lengths our donors go to show their gratitude to Texas A&M University. It is such a testament to this institution’s positive influence that so many great men and women feel compelled to support it however they can. In turn, we at the Texas A&M Foundation make it our responsibility to give donors every tool they need to make a gift that’s personally meaningful and individualized to their philanthropic goals.

In this issue of Spirit of Sharing, we’ve included several stories about donors who have left generous bequests in their wills or living trusts for Texas A&M. It’s one of the easiest and most popular ways to support the university and allows you to maintain lifelong control of your assets while leaving an immeasurable impact. In many ways, Texas A&M’s present and future is shaped by bequests. Among all the gifts documented in fiscal year 2017-2018, Texas A&M received more than $8 million from realized bequests, while future commitments from bequests total more than $94 million.

You can use a bequest to establish a new gift or supplement a current one, as in the case of the Hajeks (page 4) and Steudtners (page 13). These couples created current endowed scholarships and chose to leave bequests to grow their scholarships after their lifetimes. This dual-giving method allows them to enjoy seeing their gifts make a difference during their lifetimes, while having the knowledge that they will benefit even more Aggies in the future. In fact, nearly 600 scholarships currently available to Texas A&M students were funded by bequests.

What makes preparing a bequest so unique is the feeling of gratification that comes with seeing your lasting legacy at Texas A&M written in ink. A bequest may just be numbers and legal terms on a page now, but one day it may create a scholarship that helps a student in need, fund a program at Texas A&M that shaped you during your time here; or honor the legacy of someone who embodied what Texas A&M means to you. No matter how it’s utilized, a bequest is an enduring expression of thanks to this university and the people like you who make it so special.

Thanks for all you do.

Tyson Voelkel ’96
President, Texas A&M Foundation
WHY A WILL FAQ’s about the estate planning document everyone needs

1. WHY SHOULD I MAKE A WILL?
   A valid will is an essential part of transferring your property to the right people at the lowest cost upon your death. A will allows you to state how you want your property; pay debts and taxes; name a guardian for your minor children; provide for your favorite charities; and establish trust funds. Without a will, state laws dictate how your assets are handled.

2. HOW DO I CHANGE MY WILL OR LIVING TRUST?
   Never cross out a sentence or words or make notes on signing of the will or living trust. Instead, your attorney will prepare an amendment to your will or trust. To change a provision in your will, your attorney will prepare an amendment to your will or trust. Codicils are amendments that await him. He also celebrates his parents, who motivated and provided for him, as well as a pair of donors he’ll never meet, but to whom he’ll always be thankful: the late Martha and Charles Williams’37.

3. HOW CAN I LEAVE A CHARITABLE GIFT IN MY PLANS?
   It can be as simple as stating in your will the amount or percentage value of your estate that you want to go to a favorite charity. A charity may also be named as a beneficiary on life insurance, IRAs and other retirement plans by listing it on a change of beneficiary form provided by the company. You can also list charities as a full or partial beneficiary of a bank or brokerage account through Payable on Death or Transfer on Death designations. Real estate can also be transferred in some states by beneficiary deeds or by a life estate deed.

4. WHEN SHOULD I UPDATE MY WILL?
   You should review your plan about every five years, or sooner if any of the following occurs: a move to another state; death of spouse or divorce; change in estate value or receiving an inheritance; incapacity or death of your spouse; change in executor, guardian, trustee or agent; birth of children or grandchildren; change in charitable giving plans or changes in estate and gift tax law.

When Tate Banks ’20 talks about his future, he lights up at the prospect of opportunities that await him. He also celebrates his parents, who motivated and provided for him, as well as a pair of donors he’ll never meet, but to whom he’ll always be thankful: the late Martha and Charles Williams’37.

Banks is one of 48 students currently benefiting from the couple’s gift, which is the largest bequest ever made for PES scholarships. Their scholarships have supported more than 107 students since Mr. Williams’ passing in 2006.

Thanks to this scholarship support, Banks can focus on pursuing his bachelor’s degree in computer science while enjoying Texas A&M’s one-of-a-kind experience. “To anyone who’s considering giving a PES, I’d say do it,” he said. “It’s a proactive tool for reaching out to students who show academic excellence in high school. I wouldn’t be here without it.”

Creating a gift in your will to benefit students, faculty, colleges or programs is an easy way to leave a legacy at Texas A&M. To learn more, visit txamfoundation.com/plan.
Outside Texas A&M University’s Hart Hall dormitory, a shaded bench bears the name of the late Jerry A. Hajek III, a young man who exemplified what it means to be an Aggie.

“Jerry always did the right thing, and he never spoke badly of others,” said Bernadette “Bernie” Hajek, Jerry’s mother. “He had lots of friends and always brought people together.” She even recalls getting a phone call from his high school principal when Jerry tried to break up a fight on a school bus.

Full of life, Jerry loved adventure. His parents speak fondly about their fearless son, who preferred riding motorcycles and flying airplanes to studying. “We liked to rebuild motorcycles and play music together,” said Jerry Hajek Jr., his father. As a pilot and flight instructor, he taught 16-year-old Jerry how to fly planes, which became a shared passion of theirs.

Sadly, Jerry passed away unexpectedly from a brain aneurysm in December 2012 while visiting friends at Hart Hall. Today, the Hajeks are honoring his memory through a dual giving method: a scholarship gift created during their lifetimes supplemented by a bequest in their will.

Bernie said, “When Jerry passed away, the residents named him an honorary Hart Hall resident and carved his name into a bench.”

Bernie and Jerry Jr. felt incredibly touched by the kindness shown to them by all those who were friends with their son. To show their gratitude, they created an endowed scholarship in 2013 for Hart Hall residents who have financial need and embody the Aggie Spirit.

In 2014, a memorial scholarship banquet for Jerry was hosted on campus by Hart Hall residents. “The students and staff did an amazing job putting the event together,” said Jerry Jr. “It was heartwarming to see Jerry’s friends again and to meet the first three recipients of his named scholarship.”

As the couple continued to interact with future recipients of Jerry’s scholarship over the years, they decided to make another gift in 2017. They stipulated that 55 percent of their estate be added to Jerry’s endowed scholarship after both of their lifetimes. This dual-giving option is powerful: In the Hajeks’ case, it allows them to make a cash gift and experience the joy of interacting with current Aggie students, while also supplementing their gift with a bequest so that many more students benefit from their scholarship after their lifetimes.

“Aggies have proven time and time again to be genuine, hardworking and respectful,” Bernie said. “We want to help other young people like Jerry complete their college education.”

The Hajeks have accomplished careers in their respective industries. Bernie works as chief of staff in the flight operations directorate at NASA Johnson Space Center, where she’s been since starting as a summer co-op student in 1984. Jerry Jr. is a control systems engineer with Shell Oil, where he’s worked for 42 years.

“The world has given so much to us,” he said. “We’ve been fortunate to have wonderful educations and good jobs. Now, we can help others.” As an employee of Shell, Jerry Jr. took advantage of the company’s matching gifts program—which matches donations dollar-for-dollar up to $7,500—to create their current scholarship.

“I wasn’t aware of the matching gift program until after we’d already established the scholarship the previous year, but Shell even went back a year and matched that giving as well,” he said.

Today, the Hajeks enjoy camping, hiking, traveling and spending time at their retirement home in Arizona. Jerry Jr. still loves flying airplanes and plays electric bass in a local band. Their beloved son is buried in Webster, Texas, where Bernie and Jerry Jr. plan to be laid to rest on either side of him. Until then, they keep him in their hearts.

To learn more about making a bequest or adding to your current gift through a bequest, contact:

ANGELA THRONE ’03
Gift Planning Operations Manager
(800) 392-3310 or (979) 845-6838
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A FRIEND OF TEXAS A&M

Jerry initially enrolled at Embry-Riddle Aeronautical University in Daytona Beach, Florida, but found that it lacked the sense of camaraderie he sought. He transferred to Blinn College for one semester and lived with an Aggie who introduced him to Texas A&M’s traditions and friends of his who lived in Hart Hall. While Jerry ultimately moved back home and transferred to the University of Houston to study computer engineering, he continued to return to Aggieland to visit the friends he’d made there.

“They invited him to participate in student-organized bonfire, and he attended all the Hart Hall holiday parties and Aggie yell practices,” Bernie said. “When Jerry passed away, the residents named him an honorary Hart Hall resident and carved his name into a bench.”

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Bernie Hajek Jr. and Bernadette Hajek create an endowed scholarship for Hart Hall residents in memory of their late son.

By Molly Kulpa ’15

Deep in the Hart

Bernie and Jerry Hajek Jr.
s William McKinley ’83 surveyed each student’s floral arrangement, he spoke of balance, symmetry and asymmetry, line, form, space, texture, rhythm, flow and tension. In his critiques, it became apparent that there is a precise science to floral design that belies the more organic nature of floral arrangements.

“The art of floral design is a blending of the humanities and the sciences,” said McKinley, who has directed Texas A&M University’s Benz School of Floral Design since 2011. “Its foundation is grounded in the application of elements and principles of design, but the true essence of floral design is based on the knowledge of plant materials: how they grow, how they change and how they are best utilized. A successful floral designer must possess an appreciation of art as well as an aptitude for the science of plants.”

This philosophy guides the Benz School, which was established in 1980 through a significant bequest from the late Morris “Buddy” Benz, Class of 1932. The generous gift from his estate has put Texas A&M on the map in this niche industry, allowing countless students to study floral design and make significant contributions to the floral industry worldwide.

BLOSSOMS AND BOTANICALS

Designed for beginners and professional florists alike, the Benz School offers basic and advanced certification courses that introduce participants to every aspect of the floral business. “Topics include the care and handling of cut flowers, wiring and taping, principles and elements of design, and flower shop management,” said McKinley. “Students design event centerpieces, wedding bouquets, sympathy tributes, decorations for receptions and parties, and much more.” In the advanced class, participants also consult with prospective clients and conclude the course with an actual event design.

Approximately 50 students participate in summer classes annually, but the Benz School also hosts tours and half-day workshops with garden clubs and high school groups throughout the year. In the summer classes, attendees range from retirees and K-12 agriculture or horticulture teachers to those who aspire to start their own flower shops. In the summer 2018 basic course, one participant was even following in her mother’s footsteps.

“My mom took the Benz School class in 1993, when she was a high school horticulture teacher who also
ran her own floral business,” said Rebekah Ring ’17, who plans to teach agriculture and floral design at the high school or middle school level. “She influenced my love of flowers. I used to create my own bouquets and arrangements from her leftover scraps.”

Ring added that the basic course was beneficial on multiple fronts. “From the teaching perspective, we gained valuable course content and learned how to utilize the resources we have to benefit our students to the max,” she said. “From the florist perspective, we learned about working with customers and running a successful floral business. I was amazed by the mechanics behind a lot of designs we created.”

FLORAL FUNDAMENTALS

The mechanics Ring references are largely the result of Benz’s groundbreaking influence on the floral industry. He was the first person to base floral design on theory and principles of design. After graduating from Texas A&M and serving in the military, he opened the Benz School of Floral Design in Houston in 1946. He became known for his innovative style and exciting forms, and as his reputation grew, so too did his travels and exposure to different cultures. Soon he found himself teaching and writing about his theories of design in a series of four books that remain central to the field today.

“Buddy Benz was first and foremost open to all expressions of art, architecture, philosophical thought and social change,” said Jim Johnson ’78, who met Benz while attending his classes in 1958. “He was a lover of nature and used all these things to form his theories of floral design.”

As he neared retirement, Benz decided to establish a unique legacy at Texas A&M through a gift in his estate. First, he created the permanent Benz School within the university’s horticulture department. He also donated his entire library of floral design books and his collection of fine art, acquired through his many travels. This includes some 500 art pieces, sculptures, ceramic vessels and accessories used in his floral designs, as well as some 75 works of pictorial art from the Renaissance to the Modernist Periods. Pieces of his collection are on rotating display in the Benz Gallery of Floral Art housed in the atrium of the Horticulture/Forest Science Building at Texas A&M.

The third portion of his gift established the world’s only chair in floral design. Funds from the chair first supported Johnson, who Benz personally asked to serve as the school’s first director, and now support the work and teaching activities of McKinley. “The school is an asset not only for the endowed chair and all the associated floral artifacts, but also for the teaching opportunities it creates,” said McKinley. “Both Benz School students and Texas A&M horticulture students gain experience via the many designs the school undertakes throughout the year for campus events. The Benz School has also fostered my growth as a floral artist by expanding opportunities for me to present to garden clubs and professional organizations and collaborate with floral artists worldwide.”

Today, the Benz School has expanded to include a teaching program in South Korea, after a group of Korean floral design teachers approached Johnson in 2005 asking for the Benz material to be taught in their country. “By 2007, we translated the material and invited 20 teachers to campus for a three-week total immersion session to learn our teaching methods,” said Johnson. Today, there are approximately 40 active instructors teaching Benz School methods in Korean private schools, colleges and universities. McKinley travels to Seoul twice per year to evaluate the students of these teachers and to award Benz School certificates.

He’s excited that more and more people are learning the Benz School ways and discovering that floral design is something much deeper than meets the eye—a refined craft guided by balance, proportion, harmony and contrast. Johnson, who became hooked on floristry by age 15, is equally enthused. “Benz’s greatest influence on me was the idea that floral design can be an art form, not just a ‘paint by numbers’ exercise,” he said. “It can be something altogether exquisite.”

**IF I HAVE OPENED THE WINDOW OF MY SOUL THROUGH THIS MEDIUM OF FLOWERS AND HAVE VIEWED THE BEAUTY OF GOD OF NATURE OF UNIVERSAL ORDER THEN LIFE HAS BEEN A PRAYER.**

-MORRIS “BUDDY” BENZ ’32
Consider an IRA Charitable Rollover

Individuals who are 70 ½ or older can make a qualified charitable distribution of up to $100,000 each year from their individual retirement account (IRA). In addition to avoiding income taxes on the distribution, you’ll also lower your overall estate and future estate taxes. Just keep in mind that money must be from a qualified retirement account to a charity that meets IRS regulations.

Make a gift that costs nothing now

Many gifts, such as making a bequest in your will or naming a charity as beneficiary of your IRA, cost you nothing now. While there are no immediate tax benefits to these types of gifts, they will lower your estate taxes.

Give to get back

You can use appreciated securities or property to fund a charitable remainder unitrust that can offer you or a beneficiary an income stream. After transferring your assets into a trust, the Foundation will invest, protect and manage the trust funds. For the rest of your life or a period up to 20 years, you will be paid a fixed percentage based on the value of the trust, and the trust value is reevaluated every year. There are three primary tax benefits: You will receive an immediate charitable tax deduction on the donated assets; you will not pay estate taxes on the assets since they will be donated to Texas A&M outright upon your death; and last, this type of gift allows you to turn assets that aren’t producing income into cash without paying capital gains taxes on any profits gained. You can also add to the trust each year, thereby increasing its value and your annual payments.

Donating valuable personal property such as real estate, farm equipment, oil and gas royalties, artwork or even jewelry is an innovative way to turn your non-cash assets into charitable gifts. You’ll receive a charitable tax deduction for the fair market value of the property on the date of the gift, but since these items are not publicly traded, it’s necessary to obtain an independent third party appraisal on the item’s value to determine the deduction. This appraisal then needs to be reported on your tax return.

Be aware of charitable deduction limits

The 2018 Tax Cuts and Jobs Act, which took effect Jan. 1, 2018, included a change in the deduction limit for cash gifts. Before the act, cash gifts to public charities or public foundations were limited to 50 percent of an individual’s adjusted gross income. The new law increases this limit to 60 percent of adjusted gross income, meaning you can give more and deduct more annually. The charitable deduction limits for gifts of stock remained the same at 30 percent. You can still carry forward deductions for five years. For example, if your adjusted gross income is $1 million and you gave an $800,000 charitable gift, your charitable deduction would be $600,000 for the year you made the gift. You would receive a deduction on the remaining $200,000 the following year.

Use a match

You can maximize your charitable giving through utilizing your employer matching funds. You will not personally get a tax deduction for the match, but this is a great way to double or even triple your charitable contributions to a cause you care about. Ask your employer if they match gifts for educational purposes and make sure you follow their instructions for obtaining the match.

Remember the deadline

The deadline for charitable giving is Dec. 31, 2018. Many folks make their year-end contributions in December by credit card. When using a credit card, it is important to note that contributions you charge are deductible in the year you make the charge, not when the bill is paid.

Andy has more than 33 years of public accounting experience and serves as the lead tax partner for the San Antonio office of Ernst & Young. In 2017, he was inducted into the Texas A&M Department of Accounting Hall of Honor. He and his wife Denise ’86 support Mays Business School through the Beakey Family Scholarship endowment.

This article is intended for informational purposes only. You are encouraged to consult with your adviser when making charitable gifts.
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.

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.

Michelle ‘88 and Todd Steudtner ‘87 are passionate about helping the next generation succeed. Their commitment to future Aggies led them to include Texas A&M as a beneficiary in their trust when they began their estate planning process in 2001.

However, the Plano couple didn’t tell anyone at the Texas A&M Foundation about their decision. “I assumed that someone would distribute the assets of our trust and then mail a check to the Foundation one day,” Todd said. “When we set up the trust, we didn’t have a mechanism to tie our gift to.”

That changed in 2017 when the Steudtners established endowed engineering and business scholarships. During a meeting with Foundation staff, they realized they could designate that their trust’s funds be added to their existing scholarships. “Our $100,000 gift in our trust will increase the value of our endowments so that we can provide even more students with scholarships,” Todd said. “We’re donating now, but we’ve also set aside money to donate when we’ve moved on.”

The couple first met in Aggieland and bonded while participating in the university’s events and activities. “We really embraced the traditions, because that’s what makes Texas A&M so special,” said Michelle.

After graduation, Todd accepted a position at Texas Instruments in Dallas, where he now holds the title of high voltage electrical team manager. Michelle, who earned a degree in business analytics, currently serves as an IT senior director for PepsiCo’s North American Beverage and North American Nutrition divisions.

Realizing how much Texas A&M has influenced both their personal lives and professional careers, the Steudtners want to help others have the same experiences. They encourage other Aggies to include Texas A&M in their estate plans—and to be sure to let the Foundation know. “The process is easy and ensures that your plans are executed the way you intend,” Michelle said.

Heritage Membership Recognizes Planned Giving Donors

After letting the Foundation know of their estate intentions, the Steudtners elected to become Heritage members. Heritage membership honors individuals and families who have made planned gifts to the Texas A&M Foundation to benefit Texas A&M. Planned gifts include gifts in wills, charitable trusts, or beneficiary gifts of retirement accounts or life insurance. Heritage members enjoy special invitations to annual appreciation events and recognition on the glass panels in Legacy Hall at the Jon L. Hagler Center. Membership is optional and bears no obligation; it is simply our way to recognize your notable decision to leave a lasting impact at Texas A&M.
In 1921, Aggie mechanical and electrical engineering students achieved a pioneering broadcasting accomplishment by transmitting one of the first play-by-play radio broadcasts of a college football game in Bolton Hall. The achievement occurred during the conference championship against The University of Texas. Borrowing equipment from the Corps of Cadets Signal Corps, students ran lines from the Kyle Field press box to a transmitter tower at Bolton Hall (seen atop the building). To better describe the action and improve transmission speed, the coaching staff created abbreviations. For example, “TB A 45Y” meant “Texas ball on the Aggie 45-yard line.” Although the game ended in a scoreless tie, the transmission was a success. This experiment missed being the first such achievement in the United States only by days, but is believed to be the first in Texas.

*Image credit: Cushing Memorial Library and Archives*