

# SPIRIT *of* SHARING

GIFT AND TAX STRATEGIES FOR FRIENDS OF TEXAS A&M



FALL 2010

## The Wright Plan

*Aggie Couple's Bequest Will Fund Five Scholarships*



David Bundy

Dr. Stephen E. '77 and Elizabeth '78 Wright believe in Aggie education so strongly that 25 percent of their estate will one day go to Texas A&M University scholarships.

“My folks were of rather modest means,” Stephen Wright said. “My scholarship and \$100 a month from my ROTC contract let me focus on my degree while working only one part-time job.” Elizabeth Wright’s parents paid her tuition and fees, but she’s aware that tuition has increased dramatically and wants to help others.

*Through a bequest, Stephen E. '77 and Elizabeth '78 Wright will endow undergraduate scholarships.*

For the Wrights, a bequest was easy to set up. They were in the process of updating their estate plans, so they simply added a gift to the Texas A&M Foundation that would benefit the university. Working with their attorney, the couple exchanged e-mails with Foundation employees. “The whole process took about two weeks as we thought about wording,” Stephen Wright said.

A bequest provides flexibility: While the Wrights retain use of their assets for their lifetime, those assets will support Aggies in the future. Their bequest will fund two Corps of Cadets 21st Century Scholarships and three President’s Endowed Scholarships (PES). These scholarships support students who demonstrate academic excellence and leadership qualities.

For the Corps scholarships, the Wrights established a preference for members of the Fightin’ Texas Aggie Band. “I carried a French

*continued on page 2*



## Wright Plan *(continued from front)*

horn very well in the band, but I played very poorly,” quipped Wright, a former Air Force pilot nicknamed “Wilbur.” He turned serious when talking about his Corps classmates, however: “I was in a bad car wreck during spring break of my sophomore year. My



Stephen

Elizabeth

jaw was wired shut, and my Aggie Band classmates brought me my food to drink through a straw and pushed me to class in my wheelchair.”

The couple also established a preference for one PES—that it benefit Aggies majoring

in biochemistry, Elizabeth Wright’s field of study. “In this field, you pretty much have to go to graduate school,” she said. “The scholarship will give them a toehold with their bachelor’s degree so they can keep going. We don’t have children of our own, so it’s nice to help students go to college to receive skills and training so they can get a good job.”

The Wrights’ A&M degrees served as stepping-stones to graduate degrees and rewarding careers. Elizabeth Wright, who received her master’s degree from the University of Texas Southwestern Medical Center in Dallas, worked in reproductive endocrinology there and at the National Institutes of Health in Washington, D.C. Stephen Wright, who holds a doctorate from the Fletcher School of Law and Diplomacy at Tufts University in Massachusetts, retired as a colonel from the Air Force in 2007 after more than 30 years of service. He now teaches a graduate-level course in strategy—theory to application—for mid-career military officers at Maxwell Air Force Base in Montgomery, Ala.

“Education has meant so much for both of us,” he said. “It has given me a new lease on life to do things in retirement, to transition into academia. Education opened many doors for me, and we hope it will do the same for generations of Aggies to come.” ★

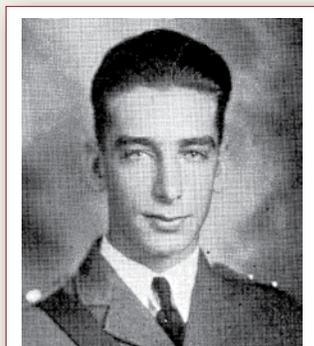
## U.T. Grad Honors Parents with Aggie Scholarship Bequest

“Daddy always said A&M was his fraternity,” says Houston resident Dorothy Falkenberg, daughter of Col. Roy T. Falkenberg ’27. “During World War II, he fought alongside fellow Aggies at the Battle of the Bulge. He kept up with his A&M friends all his life.”



*Dorothy Falkenberg*

Roy Falkenberg was active in the Fort Worth and Houston A&M Clubs and made sure his daughter attended Texas Aggie football games starring All-American John Kimbrough ’41. Dorothy Falkenberg, a University of Texas graduate, laughs when recalling that her childhood piano arrived with sheet music for the *Aggie War Hymn*.



*Roy T. Falkenberg '27*

When she reminisced about her father to closest friend George Sealy, a non-Aggie, he suggested Falkenberg honor both parents with a gift for Texas A&M.

The Dorothea and Col. Roy T. Falkenberg ’27 Corps of Cadets Scholarship Fund, which will be supported by a bequest to the Texas A&M Foundation, will provide scholarships for Corps of Cadets members who major in electrical engineering, as Falkenberg’s father did.

Through her estate gift for A&M, Falkenberg qualifies for Heritage Membership and its benefits. Last April she and Sealy visited campus for a Heritage Member dinner, breakfast and tour. ★

## New Heritage Members

The Texas A&M Foundation is happy to welcome many new Heritage Members to the A&M Legacy Society. The following individuals made their first planned gifts to the Foundation during the fiscal year ending June 30, 2010.\*

Sonja & Neal W. Adams '68  
Linda & David C. Anderson '64  
Ken & Suzan Anderson  
David E. Baker '83  
David G. Barker '66  
Janice & Greg Bowen '85  
Betty A. & Gerard S. Brink '56  
Mark '88 & Nancy '90 Browning  
Ed Cakl  
Stuart & Tiffany Campbell  
Hulda & William Coskey '75  
Vernon M. Cummings  
& Eudean M. Cummings  
Ellen & Jim Ellison  
James R. English '46  
John & Gayle Erskine  
Kay Evans '76  
William M. Evans '58  
Dorothy M. Falkenberg  
Richard Garrett '60  
Gabriela Guazzo '09  
Bill & Margo Harrison  
Patrick R. '82 & Susan D. '85  
Hedrick  
Howard "H2" & Kay Hesby  
John & Jaxon Hoefl  
Jerry '69 & Robin '75 Holbert  
Charles A. Johnson  
Glenda & Charles T. Jones '67  
C. Kenneth Landrum, M.D. '50  
Mary Nan & Emil Ervin  
Linnsaedter '59  
Glenn & Anna Maples  
Chuck '79 & Laura '81 Martin  
Ramiro S. & Sarah E. Conly  
Martinez  
Mary Louise Mathieson  
William A. & Elinor "Poppy"  
McCarty Jr. '57  
Macon McDonald '75  
Marvin & Jo Ann Mueller  
Patricia J. & Michael A. Murrillo '62  
Johnie L. Perry '69  
Carmine M. Plott '95  
L. Maxine, R.N. & F. Merrill  
Ranck, D.V.M.  
Wanona Randolph  
Wanda & Joe B. Reuss '49  
Jim & Stephanie Russ  
Richard Andersen & Ursula  
Schorn '80  
George W. Seagraves II  
Stephen H. Sharpless '69  
Sandra & Gary Simpson '77  
Hiram C. Sloan Jr.  
Charles V. Sorrels  
Francine P. & James M. Srygley '54  
Terry & Scott Terry '80  
Liz & Gary Throckmorton  
Jim & Christina Trolinger  
Cheryl A. & John E. Trott Jr. '66  
Dr. George L. & Robyn Upham  
Dr. & Mrs. Mark Wallis '85  
Kathryn '96 & Scott '95 Whitaker  
Dr. Stephen E. '77 & Elizabeth '78  
Wright

\*To notify the Texas A&M Foundation that you have established a planned gift, please call (800) 392-3310.



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# We're Here to Help

- Please send me more information about how I can create a lasting legacy at Texas A&M.
- I would like to receive sample bequest language.
- I am considering an estate gift and request a call.
- I have not previously informed you, but I have included the Texas A&M Foundation in my estate plan and would like to become a Heritage Member.

*Fold here and tape closed before mailing.*

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Name (please print) \_\_\_\_\_

Address \_\_\_\_\_

City, State, ZIP \_\_\_\_\_

Telephone (area code & number) \_\_\_\_\_

E-mail address \_\_\_\_\_

Comments/special requests: \_\_\_\_\_

\_\_\_\_\_

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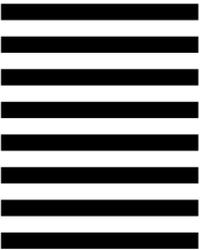
**All information is confidential.**



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## Find Planning Tips on New Website



When you visit the Texas A&M Foundation's gift planning website, [giving.tamu.edu/plan](http://giving.tamu.edu/plan), you will find new information to help you create the plan that is right for you. Rising property values, growth of investments, various types of life insurance and changing tax laws require proper planning for the future.

Without a personalized plan, taxes may unnecessarily deplete some of your assets, and remaining assets may be diverted against your wishes. Guardianship of minor children may be left to the state's discretion.

Our website provides: up-to-date information for tailoring your plan, a confidential fill-in-the-blanks wills planner, articles about donors who received tax benefits by making charitable gifts, details about the benefits of Heritage Membership, a planner for meeting your goals and helping your favorite causes, and a personalized illustration created by using the value of your assets. ★



To discuss how a planned gift to the Texas A&M Foundation might benefit you and your family, please contact Glenn Pittsford '72 in the Office of Gift Planning at [g-pittsford@tamu.edu](mailto:g-pittsford@tamu.edu) or (800) 392-3310. We will describe how such plans work and provide personalized illustrations. ★

# Planning Pays Off

Planned gifts such as bequests, life insurance policies and charitable gift annuities can benefit you and Texas A&M University. Read inside to learn how others support A&M—and the advantages of following their lead:

- Couple will share the bounty of their A&M educations
- A Longhorn honors her Aggie dad
- New gift planning site offers helpful online planning tools
- Contact us to learn about gifts that help you, your family and Texas A&M

Request a **FREE WILLS KIT** to record your family information and estate distribution plans at [giving.tamu.edu/plan](http://giving.tamu.edu/plan).

Information in *Spirit of Sharing* is not intended as legal or tax advice. This publication's purpose is to provide general information. *Spirit of Sharing* is published by the Texas A&M Foundation, which manages major gifts and endowments for the benefit of Texas A&M academics.



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