

 neWest | **WT**
ONE VISION. ONE SPIRIT. ONE TEXAS.



Amarillo Area Estate Planning Council

West Texas A&M University and WTAMU Foundation

Lesly Bosch Annen, Assistant Vice President for Leadership Gifts & Development

M. Keith Brown, Major Gift Officer



- West Texas A&M University is the Panhandle's University and is committed to serving locally first addressing the opportunities and challenges of the region as set out in the long-range plan **WT125: *From the Panhandle to the World.***
- The **One West** fundraising campaign fuels the vision of our long-range plan.
- It is the largest most ambitious fundraising effort ever undertaken across the Texas Panhandle region.
- The campaign is comprehensive – all gifts to any area at WT counts in the campaign.
- We want donors to give to areas about which they are most passionate.



Jim J. Brewer and Leah McLain
(2023-24 chairs)

Cheryl and Alex Fairly

Terry and Dyke Rogers

Sherry and David Schaeffer

Campaign Priorities

People

Expand student scholarship opportunities
and faculty endowments (professorships and chairs)

Programs

Enhance academic offerings and research

Places

Improve existing facilities and construct transformational new spaces



Campaign Sets New Goal 9/21/23

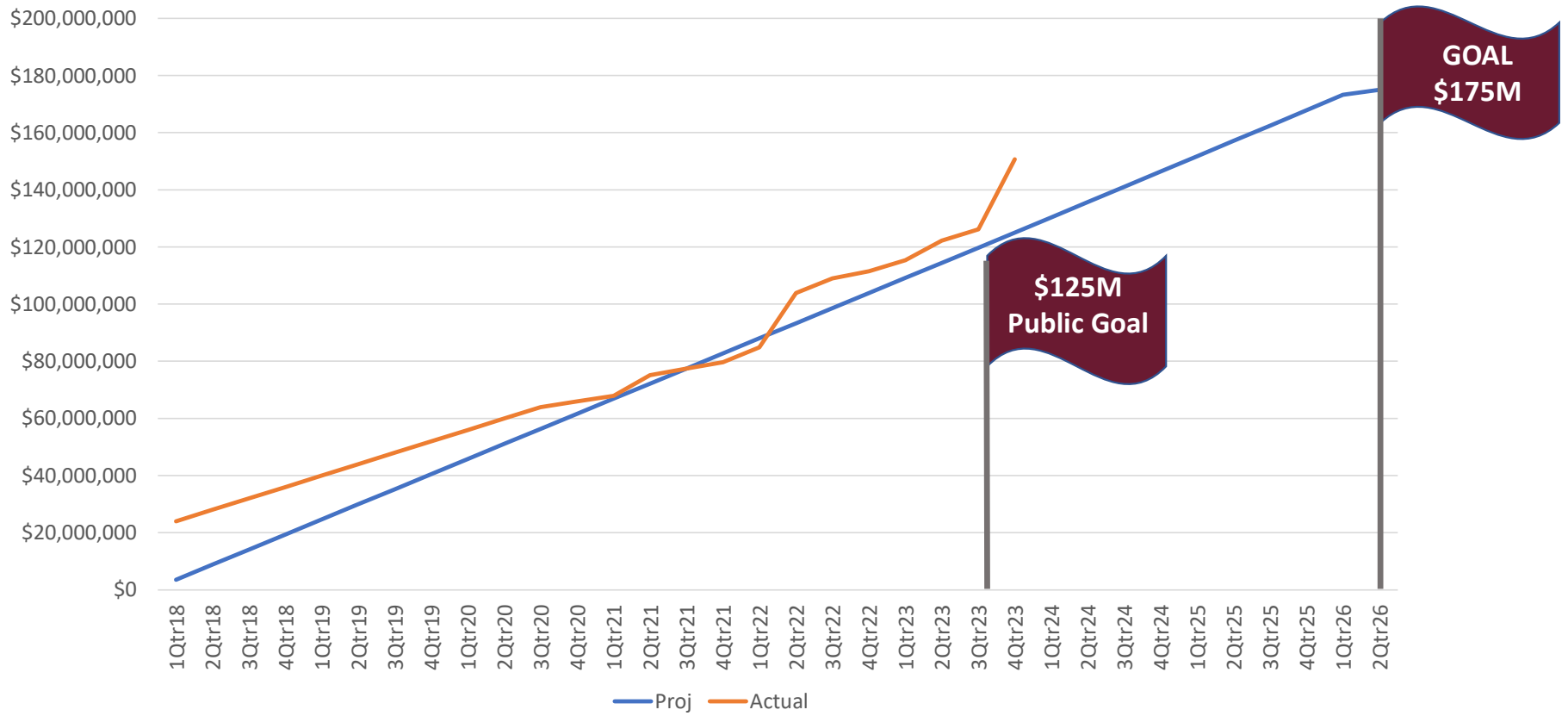
\$150,661,665 million raised

~~\$125~~ **\$175 million**

OneWest | WT



Campaign Timeline





West Texas A&M University Foundation can help make sure that heritage endures.
Considering your legacy?

WTAMU FOUNDATION LAND LEGACY PROGRAM

Our dedicated team will work with individuals and families interested in leaving real estate, commercial properties, natural resources and agricultural lands. The WTAMU Foundation provides oversight of gifts of land and other real property, facilitates its proper management, maintains good stewardship of gifts, - helps WT fulfill its mission.



Your property is more than just acreage or edifices. It is your heritage and your family's heritage — tangible representation of your hard work, stewardship and dedication.



Working with our advisors, your well-planned gift will ensure a continuity of property management and provide real, meaningful benefits to you and students now and for generations to come.

We will work closely with you to create a plan that meets your personal, business and philanthropic goals. We also will help you honor commitments you have made to those who depend on the land and have helped make it what it is.

We will help meet your goals, whatever they may be.

Your gift could:

- Preserve productive land and ensure continued agricultural viability
- Serve as a living laboratory or outdoor classroom for WT students or others throughout the region and the world
- Provide income to help fund WT's ultimate teaching and research goals, as well as an income throughout your lifetime

Contact

Our team today to let us help you ensure the enduring legacy of your land.

Assistant Vice President for Leadership Gifts & Development
Lesly Bosch Annen at lannen@wtamu.edu or 806-651-3252.

Scan QR Code to learn more about the Land Legacy at WT



The Land Legacy Advisory Council — are trusted and experienced advisors who serve as a liaison between donors, the WTAMU Foundation and the University. Your plan will be reviewed on a regular basis to make sure goals are being met.

Case Study



I Am WT
Leaving a Legacy



Case Study



The information provided below is considered confidential and is not a legally binding financial obligation.

The West Texas A&M University Foundation wishes to recognize and steward planned and estate giving through membership in the *Eternal Flame Society*.

- YES – WTAMU Foundation may publish my/our names as a member(s) of the *Eternal Flame Society*.
- I/we prefer to not have my/our name(s) listed as a member of the *Eternal Flame Society*.

Print Name/s: _____
Address: _____
City: _____ State: _____ Zip: _____
Telephone: _____ Email: _____

I/We have included WT in our estate planning in the following way(s):

- Bequest in my/our Will
- Provision in my/our Revocable Living Trust
- Establishment of a Charitable Remainder Trust
- Establishment of a Charitable Gift Annuity
- Beneficiary Designation in my/our Qualified Retirement Plan or Commercial Annuity
- Life Insurance Gift
- Other (please indicate) _____

I/we estimate the current value of my/our provision to be approximately \$ _____.
(The Foundation recognizes valuations are subject to change. Value approximations are used for recognition purposes only.)

I/We would like for our planned gift to be specifically used for the following purpose(s):

I/we worked with the following advisor(s) to establish the gift:

Name: _____ Profession: _____
Company/Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Email: _____

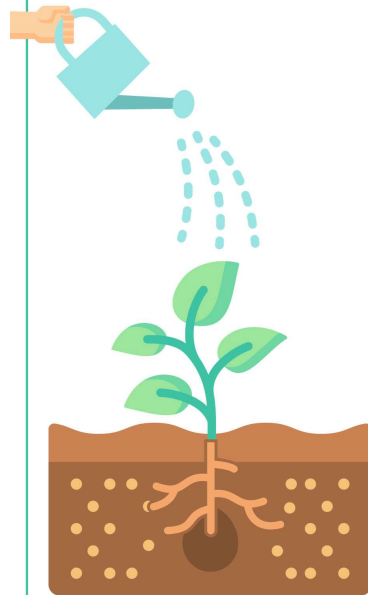
I/we would like to request the following contact person(s) to receive reports regarding the gift and its impact:

Name: _____ Relationship: _____
Company/Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Email: _____

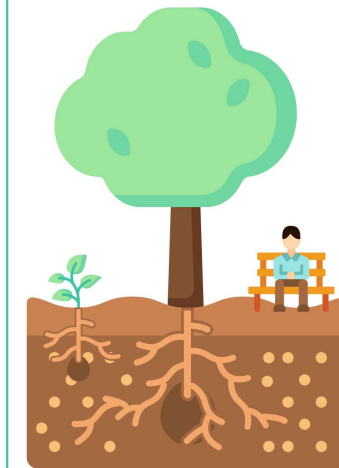
YEAR 1



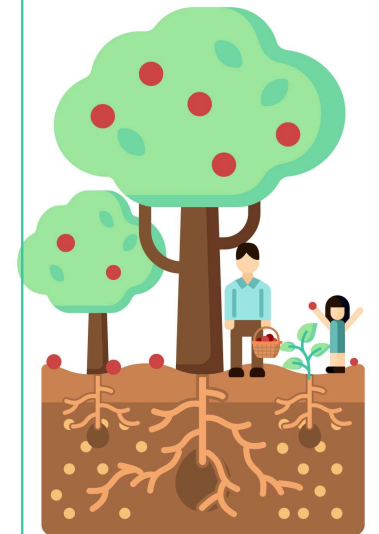
YEAR 15



YEAR 25



YEAR 50



What is an endowment?

- Endowments are established by making a gift that is then invested. This initial gift is often referred to as the **principal** or **corpus**. To create an endowment, there is a **minimum gift level** that must be obtained in one or more gift payments. These initial gifts are the **endowment's book value**.

WT Scholarship Endowments	<i>\$25,000 minimum gift level</i>
WT Program Endowments	<i>\$25,000 minimum gift level</i>
WT Professorship Endowments	<i>\$125,000 minimum gift level</i>
WT Chair Endowments	<i>\$1,250,000 minimum gift level</i>

How is an endowment established?

- A **gift instrument** is created which outlines the **endowment's specific purpose**.

Provides support to **WTAMU students** who...

- A portion of the annual interest earned is used to support the purpose of the endowment. This is the **award** or **scholarship**.

WT Scholarship Endowment \$25,000; approximate annual award is \$1,000

- Additional earnings typically increase the **endowment's market value and annual award**.

What is the value of establishing an endowment?

- Endowments are a critical mechanism to **provide sustainability** for students, faculty, programs, and research.
- Endowments provide **perpetual funding** and **preserves the donor's original intent**. The donor's intent is the purpose and selection criteria documented in the gift instrument.
- Endowments are **named** and have a **lasting impact** and **legacy**. The designee receives **annual endowment reports**.



All gifts, regardless of size, make a difference in the
OneWest Comprehensive Campaign.

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