The Charitable IRA Rollover Has Been Extended for 2009

A great way to support TWU by allowing you to:

- Transfer funds directly to the TWU Foundation and avoid reporting gift as taxable income
- Satisfy the required minimum distribution from your IRA

Contact the TWU Foundation now for more details!

Old Main Society

Named after the first building on the Denton Campus, the Old Main Society recognizes alumni and friends who have included the TWU Foundation or TWU in their estate plans through wills, trusts, insurance, life income gifts or other forms of deferred planned giving. The next Old Main Society Donor Recognition Coffee is set for Reunion Weekend – April 2010 on TWU’s Denton Campus.

Wills & Bequests

You can support the TWU Foundation by including a bequest in your will. A bequest to the TWU Foundation can be fully deductible for estate tax purposes. You can share the following bequest language with your attorney, accountant and/or tax adviser who can ensure your estate plan meets legal requirements and fits your individual needs.

“I give and bequeath to the Texas Woman’s University Foundation, P. O. Box 425618, Denton, Texas 76204-5618, (Option 1) the sum of $______________, (Option 2) _____________% percent of total (or remainder) of estate, (Option 3) the following assets:____________ (e.g. real estate, securities, personal property), for the purposes of ___________________________________________________."

Please call 940-898-3878 or e-mail foundation@twu.edu for more information.
Contact Gilland Chenault for more information: 940-898-3878 or e-mail gchenault@twu.edu

TEXAS WOMAN’S UNIVERSITY FOUNDATION
P.O. Box 425618, Denton, TX 76204-5618
ENDOWMENTS – A Way to Honor and Support

When you create a named endowment to honor a family member, friend, or an influential person in your life, you create a lasting legacy that will support students and programs at Texas Woman’s University. The exact purpose and scope of your gift is determined by you. Endowments can benefit students studying in a certain academic area or who have achieved a certain level of academic success. Endowments can also benefit a specific academic school or program within TWU.

When Mrs. Elizabeth Peterson of San Angelo, Texas thought of a way to honor her late mother, Aleene Perry Bowman, she considered several options through the TWU Foundation. “Throughout her life, my mother always valued the education she received at TWU. I am very pleased that I could create an endowment to provide scholarships to help students follow in my mother’s footsteps,” Mrs. Peterson said. Mrs. Bowman obtained her Bachelor of Science in Education in 1942 and her Master’s in Education in 1946.

Like all endowments established through the TWU Foundation, Mrs. Peterson’s gift will be invested. The principal will remain intact in perpetuity, while the interest earned will be used annually to support the purpose of the endowment. The Aleene Perry Bowman Scholarship Endowment will provide annual scholarships for students enrolled in TWU’s College of Professional Education.

There are several payment options when creating an endowment. The minimum amount necessary to establish an endowment is $10,000 which can be paid over five (5) years. You can create an endowment using cash, stock, real estate or property. Your estate plans such as a will, trust, retirement plan or insurance policy also can be used to create an endowment.

Honoring someone who has made an impact on your life provides you the opportunity to say, “Thank You.” To learn more about establishing your endowment, please return the attached response form or contact the TWU Foundation at 940-898-3878 or foundation@twu.edu.

Did you know . . .

• Student enrollment at TWU has grown 57 percent since fall 2001 for a total enrollment of 12,469 students in fall 2008
• Endowment and estate gifts provide a majority of scholarships at TWU
• 59 percent of TWU’s graduates are first generation college students
• You can specifically designate in your will or trust how you would like your gift to be used, whether it be for scholarships or to support programs at TWU
• TWU’s Honors Scholar program is one of the 10 most selective honors programs in Texas

Texas Woman’s University Foundation: WE’RE HERE FOR YOU . . .

The TWU Foundation understands that, as you consider creating an endowment or making a gift through your estate plans, you must balance your personal lifestyle, family’s needs and financial resources with your desire to support TWU. Keeping this balance requires careful planning, and we are available to help you make the most informed decision possible. For additional information, please call, e-mail, or submit this card.

Name: ________________________________ Phone: ____________________ E-mail: ____________________________

Address: ____________________________________________________________ City: ___________________ State: ____________ Zip: __________________

I would like information about: ☐ Making a gift through my will or trust  ☐ Creating a new endowment
☐ How to make a tax free gift through my IRA  ☐ How to make a gift that provides lifetime income and a partial tax deduction
☐ I would like to make a gift to an existing endowment at TWU, please find my attached check for:

$___________________________ for the ___________________________________________________________________endowment

I have not previously informed you, but I have already included ☐ TWU ☐ TWU Foundation in my estate plan through
☐ my will  ☐ a trust arrangement ☐ an insurance policy ☐ my retirement plan ☐ other estate plans