Methods of Giving
Create Your Texas A&M Legacy
Your Gift. Your Way. Your Texas A&M.

You can support Texas A&M in many ways—very few require a lump-sum check. You can pledge a gift to be completed in five years or plan a gift that will be fully funded in the future. When you invest in the spirit and mind of Texas A&M, you make a difference for our university, communities, state and country. It’s a deeply rewarding way to express your belief in the greater good.

As we look toward the future, we know that the generosity of those who invest in Texas A&M will make all the difference in our university’s success. By giving through the Foundation, you can benefit from your investment as well. The best giving plans make a difference in the lives of others and can improve your own financial and/or tax situation—often right away. If you prefer to defer funding your gift until after your lifetime, there are several methods from which you can choose, each with different benefits. In addition, some giving methods pay you for a particular time period, after which the remainder of the gift will be your legacy to A&M.

When you support Texas A&M we will work with you to ensure both you and the university benefit.
Importance of Endowments

Endowment gifts are crucial to Texas A&M’s future because they permanently benefit the university. The Texas A&M Foundation invests endowments using asset allocation to maximize growth while safeguarding capital during tough economic times.

Here is an example of an endowment’s important staying power: If a donor created a $100,000 scholarship in 1980, this one endowment would have paid students a total of more than $280,000 by 2010.

Direct Your Gift

A gift for Texas A&M should reflect your interests, your dreams and your legacy. The Foundation will work with you to create a gift agreement that designates the specific areas of Texas A&M you want to benefit.

Legacy Society

The Texas A&M Legacy Society recognizes individuals, corporations and organizations whose current gifts to Texas A&M cumulatively total $100,000 or more. Heritage Membership in the Texas A&M Legacy Society honors donors who create planned gifts of any amount. See page 23 for details.

This booklet is for informational purposes only. It is not intended as legal or tax advice. You are encouraged to consult with your advisor when making charitable gifts.
Current Gifts

If you want your gift for Texas A&M to go to work immediately, a current gift of cash or securities might be the best option. You can give a lump sum or pledge a gift to be completed in five years. Real estate and intangible property also make excellent outright gifts with immediate impact but might require planning.

Gift Assets

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<th>Asset</th>
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<tbody>
<tr>
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</tr>
<tr>
<td>Securities</td>
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<td>Real Estate</td>
<td>6</td>
</tr>
<tr>
<td>Intangible Property</td>
<td>7</td>
</tr>
</tbody>
</table>

Matching Gifts

Did you know you may be able to double, triple or quadruple the amount of your current gift by using a corporate matching program? Each company has its own rules and matching gift forms, so check with your employer’s human resources department. Several companies offer retirees and widows of employees the same matching gift opportunities they offer current employees.
CASH

THE GOAL
You want to make a quick and easy gift.

THE GIFT
You can give via check, credit card or electronic funds transfer.

THE DETAILS
Write a check payable to the Texas A&M Foundation or visit giving.tamu.edu and click on “Give Now” to make a gift by credit card. You can also set up automatically recurring payments online. Contact the Foundation at (800) 392-3310 for electronic funds transfer instructions.

THE BENEFITS
Tax Deduction: You will receive an immediate charitable income tax deduction.

SECURITIES

THE GOAL
You want to avoid capital gains tax on the sale of securities.

THE GIFT
You can give publicly held stocks, closely held stocks, bonds or mutual funds.

THE DETAILS
Contact the Foundation at (800) 392-3310 to transfer securities.

THE BENEFITS
Tax Deduction: You will receive an immediate charitable income tax deduction.
Capital Gains Bypassed: You can eliminate capital gains tax on your gift.
THE GOAL

You want to make a current gift of property, eliminate ownership and management burdens, and generate tax benefits.

THE GIFT

You can give your home, oil and gas interests, vacation property, commercial property, or land.

THE DETAILS

Donate the property to the Texas A&M Foundation after an appraisal and approval from the Foundation.

THE BENEFITS

Tax Deduction: You will receive an immediate charitable income tax deduction.
Capital Gains Bypassed: You can reduce or eliminate capital gains tax with your gift.
Burdens of Ownership Removed: You will relieve yourself of maintenance, tax and insurance obligations on the property.

REAL ESTATE AS A PLANNED GIFT

Real estate can be a flexible asset to use when making a gift to the Texas A&M Foundation. You can give your real estate after your lifetime through your will (see page 10). Another option is to donate it now and receive payments from a charitable remainder trust (see page 17). You can also keep the right to use and enjoy your property during your lifetime with a retained life estate (see page 19).
INTANGIBLE PROPERTY

THE GOAL

You want to make a gift of intangible property and generate tax benefits.

THE GIFT

You can give patents, copyrights or royalties.

THE DETAILS

Contact the Foundation at (800) 392-3310 for information about making a gift of intangible property.

THE BENEFITS

Tax Deduction: You will receive an immediate charitable income tax deduction.
Planned Gifts

Join the growing number of Aggies planning their gifts and estates to benefit themselves, their families and Texas A&M. This section tells how you—through planned gifts—can provide for loved ones, receive tax benefits, generate potential retirement income and help Texas A&M all at the same time.

A wide range of planned gift options is available, allowing you to tailor a gift to your unique needs and interests. After-lifetime gifts such as bequests or gifts of retirement assets will benefit Texas A&M without using your current assets or income. Dual-benefit gifts such as a charitable gift annuity or charitable remainder trust will offer you and your family significant benefits as you support Texas A&M.

If you want to create a future gift for Texas A&M, the Foundation’s experienced gift planners will work with you, your attorney and other advisors to design the best gift plan for your individual situation.

PLANNED GIFTS ARE FOR EVERYONE

It’s never too early to think about creating a future gift for Texas A&M. Anyone who has property and a family should have an estate plan, and a charitable gift can be an important part of that plan.
TYPES OF PLANNED GIFTS

After-lifetime Gifts
Bequest ................................................................. 10
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Testamentary Charitable Remainder Unitrust ................. 15

Dual-benefit Gifts
Charitable Gift Annuity ............................................... 16
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Retained Life Estate .................................................. 19
Part Unitrust, Part Sale ............................................... 20
Bargain Sale ............................................................. 21

For anyone who has benefited from all the great things A&M offers and wants to give back, an estate gift is an excellent choice. Your estate can be used to great value long after you are gone. The endowments created will carry on forever.

—Craig Noonan ’66
BEQUEST

Did you know that a bequest is the most common type of planned gift? A bequest is a gift for Texas A&M in your will or living trust. It is simple to make and easy to implement.

THE GOAL

You want to support Texas A&M but need access to your assets during your lifetime.

THE GIFT

You retain ownership and use of assets during your lifetime but leave a portion of them to the Texas A&M Foundation in your will or living trust to benefit Texas A&M as you wish.

THE DETAILS

There are many ways to leave a bequest to the Foundation in your will or living trust. You can leave a specific item, a dollar amount or a percentage of your estate.

Your attorney can use the following language in preparing your bequest for the benefit of Texas A&M University:

I give, devise and bequeath to the Texas A&M Foundation, a nonprofit corporation organized in accordance with the laws of the State of Texas for the purpose of supporting Texas A&M University, an educational institution, located at College Station, Texas, the following described property: ______________________.

The property comprising this gift may, for investment purposes, be merged with any of the general investment assets of the Texas A&M Foundation, but the gift shall be entered in the Foundation’s books and records as the ________________ Fund and shall always be so designated.

THE BENEFITS

Tax Deduction: Your estate will receive a charitable estate tax deduction.

Revocable: If your circumstances change, so can your gift.
THE GOAL
You want to avoid income and estate taxation on Individual Retirement Accounts (IRAs) or other retirement accounts.

THE GIFT
You name the Texas A&M Foundation as beneficiary of your tax-deferred retirement account.

THE DETAILS
IRAs and other tax-deferred retirement accounts are great ways to accumulate assets to provide for retirement. They are not ideal for transferring wealth to the next generation, though, because they carry a tax burden to beneficiaries (except spouses) when inherited. Bequests of homes, land, stocks, bonds and other similar assets do not incur the same tax burden, so they are preferable assets to leave to family in wills and estate plans.

Many individuals leave less-taxed assets to their heirs and give IRAs or other tax-deferred accounts to the Foundation. As a charitable organization, the Foundation receives these retirement assets free of tax to benefit Texas A&M as you wish.

THE BENEFITS
Tax Advantages: Your retirement assets can benefit Texas A&M instead of being paid as taxes, and your family can receive other assets that bear less of a tax burden.

Revocable: If your circumstances change, so can your gift.

GIVE YOUR IRA TWICE
In some instances, the percentage of the estate in tax-deferred retirement accounts is large. A testamentary charitable remainder unitrust funded with retirement assets benefits your family and Texas A&M while providing significant tax savings. See page 15 for more information on testamentary charitable remainder unitrusts.
Choose the Gift That Matches Your Goals

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<tr>
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<th>MINIMUM AMOUNT</th>
<th>FUNDING ASSETS</th>
<th>YOUR GOAL</th>
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<tbody>
<tr>
<td>Cash</td>
<td>No minimum</td>
<td>Check, credit card, electronic funds</td>
<td>Make a quick and easy gift.</td>
</tr>
<tr>
<td>Securities</td>
<td>No minimum</td>
<td>Publicly held stocks, closely held stocks, bonds, mutual funds</td>
<td>Avoid capital gains tax.</td>
</tr>
<tr>
<td>Real Estate</td>
<td>No minimum</td>
<td>Home, oil and gas interests, vacation property, commercial property, land</td>
<td>Generate tax benefits through a property gift.</td>
</tr>
<tr>
<td>Intangible Property</td>
<td>No minimum</td>
<td>Patents, copyrights, royalties</td>
<td>Generate tax benefits through a property gift.</td>
</tr>
<tr>
<td>Bequest</td>
<td>No minimum</td>
<td>Cash, securities, real estate</td>
<td>Control assets during your lifetime.</td>
</tr>
<tr>
<td>Retirement Account</td>
<td>No minimum</td>
<td>Retirement assets</td>
<td>Avoid double taxation on your IRA or other retirement assets.</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>No minimum</td>
<td>Life insurance policy</td>
<td>Make a gift without using current assets.</td>
</tr>
<tr>
<td>Testamentary Charitable Remainder Unitrust</td>
<td>$25,000</td>
<td>Retirement assets, cash, securities, real estate</td>
<td>Pass part of your estate to the next generation in the form of regular payments.</td>
</tr>
<tr>
<td>Charitable Gift Annuity</td>
<td>$10,000</td>
<td>Cash, securities</td>
<td>Receive fixed payments for life.</td>
</tr>
<tr>
<td>(not available in all states)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Charitable Remainder Trust</td>
<td>$25,000</td>
<td>Cash, securities, real estate</td>
<td>Turn an appreciated asset producing little or no income into an income stream with tax advantages.</td>
</tr>
<tr>
<td>Charitable Lead Trust</td>
<td>Contact us</td>
<td>Cash, securities, real estate</td>
<td>Benefit Texas A&amp;M and then transfer assets to family at minimal tax cost.</td>
</tr>
<tr>
<td>Retained Life Estate</td>
<td>Based on appraised amount</td>
<td>Real estate</td>
<td>Give a gift of real estate but maintain lifetime use.</td>
</tr>
<tr>
<td>Part Unitrust, Part Sale</td>
<td>Based on appraised amount</td>
<td>Real estate</td>
<td>Liquidate a highly appreciated asset without incurring substantial tax.</td>
</tr>
<tr>
<td>Bargain Sale</td>
<td>Based on appraised amount</td>
<td>Real estate</td>
<td>Sell your property and receive the tax advantages of a charitable gift.</td>
</tr>
<tr>
<td>HOW IT WORKS</td>
<td>YOUR BENEFITS</td>
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<td>---------------------------------------------------------------------------------------------</td>
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<td></td>
</tr>
<tr>
<td>Write a check, give online or set up a funds transfer.</td>
<td>Tax deduction</td>
<td>5</td>
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</tbody>
</table>
| Transfer your securities to the Foundation.                                                                                                                                                                    | Tax deduction  
  Capital gains bypassed                                                              | 5    |
| Donate your property to the Foundation.                                                                                                                                                                       | Tax deduction  
  Capital gains bypassed  
  Burdens of ownership removed                                                              | 6    |
| Donate your property to the Foundation.                                                                                                                                                                       | Tax deduction                                                                               | 7    |
| Designate the Foundation as a beneficiary in your will or living trust.                                                                                                                                       | Tax deduction  
  Revocable                                                                                   | 10   |
| Designate the Foundation as the beneficiary of your retirement account.                                                                                                                                       | Tax advantages  
  Revocable                                                                                   | 11   |
| Change beneficiary or transfer ownership of your life insurance policy to the Foundation.                                                                                                                                 | Tax advantages                                                                               | 14   |
| Include a charitable trust in your will or living trust that pays your beneficiaries for life. The Foundation receives the remainder.                                                                        | Tax deduction  
  Payments for life  
  Revocable                                                                                     | 15   |
| Give cash or securities to fund a gift annuity and receive fixed payments for life. The Foundation receives the remainder.                                                                                   | Tax advantages  
  Capital gains bypassed  
  Payment for life  
  Attractive rates                                                                                                           | 16   |
| Transfer cash or appreciated property to fund a trust that sells your property and provides you with payments for life or a term of years. The Foundation receives the remainder. | Tax deduction  
  Capital gains bypassed  
  Payments for life  
  Burdens of ownership removed                                                               | 17   |
| Transfer cash or property to fund a trust that makes gifts to the Foundation for a term of years. Your family receives the remainder.                                                                          | Tax advantages                                                                               | 18   |
| Give your property to the Foundation but retain the right to use the property during your life or the life of a beneficiary.                                                                                   | Tax advantages  
  Lifetime use of property                                                                      | 19   |
| Deed a portion of your real estate into a charitable remainder trust. After the property is sold, you receive your portion of the proceeds, and your trust receives its share. | Tax deduction  
  Capital gains bypassed  
  Payments for life  
  Burdens of ownership removed                                                               | 20   |
| The Foundation purchases your property for less than fair market value. Your gift is the difference between the market value and the purchase price.                                                            | Tax deduction  
  Capital gains bypassed  
  Burdens of ownership removed                                                               | 21   |
THE GOAL
You want to make a gift to support Texas A&M without using current assets.

THE GIFT
You name the Texas A&M Foundation as beneficiary of your life insurance policy or give ownership of the policy to the Foundation to benefit Texas A&M as you wish.

THE DETAILS
There are three types of life insurance gifts. The first option is to retain ownership of the policy and name the Texas A&M Foundation as beneficiary. You can also give a paid-up life insurance policy to the Texas A&M Foundation. Finally, you can give a new or existing life insurance policy with continuing premiums. For this option, you will transfer ownership of the policy and make annual tax-deductible gifts to the Texas A&M Foundation that will be used to pay the premium.

THE BENEFITS
Tax Advantages: If you make the Foundation owner of your policy, you receive an immediate charitable income tax deduction and reduce your taxable estate. If you name the Foundation beneficiary of the policy while retaining ownership, your estate will receive an estate tax deduction.

LIFE INSURANCE
When you first bought life insurance, you obviously felt the coverage was necessary. Perhaps your situation changed, yet you still have the same policies. Just as life insurance can provide future lump sums to family members, it can also be used to benefit A&M.
THE GOAL
You want to pass part of your estate to the next generation in the form of regular payments rather than a lump sum.

THE GIFT
You include a “give it twice” trust in your will that is funded after your lifetime. It provides payments to your children or other beneficiaries for a term of years or their lifetimes, and then distributes the trust remainder for the benefit of Texas A&M.

THE DETAILS
You make provisions in your will or living trust for a testamentary charitable remainder unitrust to begin after your lifetime. The trust pays a set percentage (usually between 5 and 7 percent) each year to your beneficiaries for their lifetimes or a period of up to 20 years. After paying the beneficiaries for the duration of the trust, the Texas A&M Foundation receives the trust remainder, which then benefits Texas A&M as you wish.

Retirement accounts or any accounts containing tax-deferred income are commonly placed into testamentary charitable remainder unitrusts by naming the trust as beneficiary (or contingent beneficiary for a married couple) because they can pass tax-free to a charitable trust. Real estate, securities and cash may also fund a testamentary charitable remainder unitrust.

THE BENEFITS
Tax Deduction: Your estate will receive a charitable estate tax deduction.

Payments for Life: Your beneficiaries receive payments each year from your trust based on a set payout rate that you choose.

Revocable: If your circumstances change, so can your gift.
### THE GOAL

You want to make a gift to benefit Texas A&M and receive fixed payments for life.

### THE GIFT

You give cash or securities to fund the gift annuity, and the Texas A&M Foundation makes fixed payments to one or two individuals for their lifetimes. The remainder benefits Texas A&M.

### THE DETAILS

A charitable gift annuity for Texas A&M is a contract between you and the Texas A&M Foundation. In exchange for a gift of cash or securities, the Texas A&M Foundation agrees to make fixed payments for the lifetime(s) of one or two individuals. When the gift annuity terminates, the Foundation uses the remainder to benefit Texas A&M as you wish. Annuitants must be at least 50 years old when payments begin, and the minimum amount to create a gift annuity is $10,000.

A gift annuity contract can generate immediate payments (current gift annuity) or defer payments for at least one year (deferred gift annuity).

### THE BENEFITS

**Tax Advantages:** You will receive an immediate charitable income tax deduction. Also, a portion of each payment may be tax-free for a period of time.

**Capital Gains Bypassed:** You can reduce capital gains tax on securities used to fund the gift.

**Payments for Life:** One or two individuals receive fixed payments for life.

**Attractive Rates:** Payout rates are based on age. The older the beneficiary, the higher the rate.
CHARITABLE REMAINDER TRUST

Do you own an appreciated asset producing little or no income? Use it to fund a charitable remainder trust that generates income and tax advantages.

THE GOAL

You want to turn an appreciated asset that generates little or no income into a productive asset without paying capital gains tax on the sale.

THE GIFT

You fund a charitable remainder trust with appreciated securities, real estate or cash. The trust makes payments to selected beneficiaries for their lifetimes or a specified term of years. It then distributes the remaining trust assets into an endowment that benefits Texas A&M as you wish.

THE DETAILS

You transfer cash, appreciated securities or appreciated real estate to a charitable remainder trust. This tax-exempt trust can sell the property without paying capital gains taxes at the time of the sale.

There are two types of charitable remainder trusts, both of which will pay you and your beneficiaries for life and/or a period of up to 20 years. With a charitable remainder unitrust, beneficiaries receive a fixed percentage payout (usually between 5 and 7 percent) based on the value of the assets in the trust, which are revalued annually. With a charitable annuity trust, beneficiaries receive a fixed dollar payout based on the value of the assets when the trust was created.

After paying the beneficiaries for the duration of the trust, the Texas A&M Foundation receives the trust remainder, which then benefits Texas A&M as you wish.

THE BENEFITS

Tax Deduction: You will receive an immediate charitable income tax deduction.

Capital Gains Bypassed: You can reduce capital gains tax on securities used to fund the gift.

Payments for Life: You and your beneficiaries receive payments each year from your trust based on a set payout rate or a set dollar amount.

Burdens of Ownership Removed: You will relieve yourself of maintenance, tax and insurance obligations on real estate used to fund the trust.
CHARITABLE LEAD TRUST
You may want to support A&M but do not want to take assets away from your family. When you fund a charitable lead trust, you can benefit Texas A&M and your family.

THE GOAL
You want to benefit Texas A&M for a period of time and then transfer the assets to your family at minimal tax cost.

THE GIFT
You contribute assets to a charitable lead trust that will make distributions to the Texas A&M Foundation to benefit Texas A&M as you wish for a specified number of years and ultimately distribute the assets to your family.

THE DETAILS
You transfer assets to the charitable lead trust, a taxable trust. You can fund the trust during your lifetime or through your will.

For a specified period of years, the trust will report its income and take a deduction for the amount that it distributes to the Texas A&M Foundation. After paying the Foundation for the duration of the trust, your designated beneficiaries will receive the trust remainder tax-free.

THE BENEFITS
Tax Advantages: You receive a current gift or estate tax deduction for the present value of the payments that will benefit A&M. Any asset growth within the trust passes to your family with no additional tax when the trust terminates. Also, a charitable lead trust can reduce your taxable estate.
THE GOAL
You want to give your real estate to the Texas A&M Foundation but maintain lifetime use of the property.

THE GIFT
You deed your home or property to the Texas A&M Foundation now, but the Foundation will not take possession of the property until after your lifetime or that of your beneficiary.

THE DETAILS
You execute a deed transferring your property (home, vacation residence, farm, ranch, condominium, etc.) to the Texas A&M Foundation to benefit Texas A&M as you wish. In the deed, you retain a “life estate” that grants you and/or your designated beneficiary the right to lifetime use of the property.

You are still responsible for property maintenance, taxes and insurance. You are entitled to any income generated from the property, such as rent and agricultural proceeds.

You can move out of the residence permanently at any time. If you relinquish your life interest in the property, you qualify for an additional charitable income tax deduction.

THE BENEFITS
Tax Advantages: You receive an immediate charitable income tax deduction and reduce your taxable estate.

Lifetime Use of Property: You can use and control the property during your lifetime.
PART UNITRUST, PART SALE

Your investments may have gained value but produce little income. Now may be the time to sell and enjoy the fruits of a wise investment with a “part unitrust, part sale.”

THE GOAL

You want to liquidate a highly appreciated asset without incurring substantial capital gains tax.

THE GIFT

You deed a portion of your real estate into a charitable remainder trust. After the property is sold, you receive your portion of the proceeds, and your trust receives its share. The trust makes payments to you and then distributes the remainder into an endowment for Texas A&M.

THE DETAILS

There are several steps to a “part unitrust, part sale.” First, you deed a portion of the property to a charitable remainder trust. Second, you and your trustee sell the property. Finally, at closing you receive a portion of the proceeds, and your trust receives its share.

The portion of your property that is transferred to the charitable remainder trust will bypass capital gains tax. The charitable income tax deduction from your trust will offset all or part of the capital gains tax due on the sale portion.

Your trust will provide payments to you and your beneficiaries for life and/or a period of up to 20 years. At the termination of the trust, the remainder funds an endowment at the Texas A&M Foundation to benefit Texas A&M as you wish.

THE BENEFITS

Tax Deduction: You will receive an immediate charitable income tax deduction for the portion of the asset placed into your trust.

Capital Gains Bypassed: You can reduce or eliminate capital gains tax on the property.

Payments for Life: You and your beneficiaries receive a set payout each year from your trust.

Burdens of Ownership Removed: You will relieve yourself of maintenance, tax and insurance obligations on the property.
BARGAIN SALE

Do you plan to sell some of your real estate this year?
A bargain sale is one way to sell your property and help Texas A&M.

THE GOAL
You want to sell your property and receive the tax advantages of a charitable gift.

THE GIFT
The Texas A&M Foundation purchases your property for less than fair market value. Your gift, which is the difference between the fair market value and the bargain purchase price, will be used to benefit Texas A&M as you wish.

THE DETAILS
You sell your property to the Texas A&M Foundation for less than fair market value. You receive a charitable income tax deduction for your gift, which is the difference between the property’s fair market value and the cash received.

THE BENEFITS
Tax Deduction: You will receive an immediate charitable income tax deduction.
Capital Gains Bypassed: You can reduce or eliminate capital gains tax on the property.
Burdens of Ownership Removed: You will relieve yourself of maintenance, tax and insurance obligations on the property.

A BARGAIN SALE WORKS EVEN WITH MORTGAGED PROPERTY
A bargain sale works well even if there is a debt on your property. When the real estate is sold to the Texas A&M Foundation, you will be relieved of your debt obligation. While you might pay tax on this debt relief, it will likely be offset by the charitable income tax deduction from the gift.
Texas A&M Legacy Society
The Texas A&M Legacy Society recognizes individuals, corporations and organizations whose current gifts to Texas A&M cumulatively total $100,000 or more.

Heritage Membership
Heritage Membership in the Texas A&M Legacy Society honors individuals and families who have made planned gifts of any size to benefit A&M.

Legacy Society and Heritage Member Benefits
• Invitation to annual appreciation events
• Recognition in the Jon L. Hagler Center
• Acknowledgment in Foundation publications

Becoming a Member
The Texas A&M Foundation will contact you about joining Legacy Society once you reach the cumulative giving level. If you have named the Foundation as beneficiary of a planned gift of any size, please contact our Office of Gift Planning to become a Heritage Member in Legacy Society.

Find out more about becoming a Heritage Member. Visit giving.tamu.edu/plan or call the Texas A&M Foundation Office of Gift Planning. Our vice president for gift planning, Glenn Pittsford ’72, will be happy to answer your questions.

(800) 392-3310 or (979) 845-8161
Email: g-pittsford@tamu.edu