

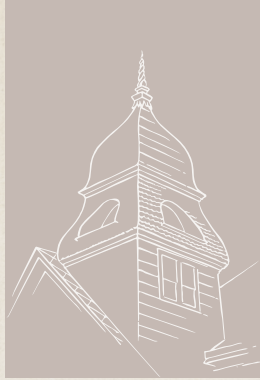
SPRING 2014

HERITAGE

OKLAHOMA STATE UNIVERSITY FOUNDATION OFFICE OF GIFT PLANNING



*Members of Heritage Society
touring new football facilities*



Welcome to the SPRING 2014 issue of the Heritage Newsletter

Greetings from Stillwater!

On April 25, the Oklahoma State University Foundation hosted a daylong celebration for our Heritage Society members, a special group of friends who have included OSU in some aspect of their estate plans and have shared that good news with us. The event exceeded 100 participants, more than doubling last year's attendance.

The celebration started with a kickoff lunch in Taylor's Dining Room prepared and served by Chef Paul Brennan and our students from the Hotel and Restaurant Administration program. As it turns out, the lunch was actually an exam grade for the students, who passed with flying colors!

After lunch, Heritage Society members boarded shuttle buses to take them to tours of the Sherman E. Smith Training Center, the Michael and Anne Greenwood Tennis Center, and the recently opened Postal Plaza Gallery. The afternoon culminated in a reception at the Flying Aggies hangar, where Dr. John Loffi spoke to the group about our aviation and space program. Mallory Casebolt, a scholarship recipient and doctoral student in the program, also shared the impact her scholarship has made on pursuing her degree.

As you can see from the pictures on the opposite page, it was fun to connect with old friends, make new ones, and learn more about OSU's modern programs and facilities, of which many attendees had little previous exposure.

For those Heritage Society members unable to attend, we hope to see you at next year's event. If you are not a member of the Heritage Society but would like to learn more about the group and the impact they have on the future of Oklahoma State, we invite you to contact the Office of Gift Planning at (800) 622-4678 or visit OSUgiving.giftlegacy.com.

THANK YOU!

David

DAVID MAYS
Senior Associate VP of Gift Planning

OSU FOUNDATION GIFT PLANNING TEAM

Melinda McAfee, John Strah, Nina Phipps,
David Mays, and Diana Lasswell



ENID RADIOLOGIST GIVING NOW & LATER

RUSSELL'S CHARITABLE GIFT ANNUITY HAS MANY PHILANTHROPIC BENEFITS

Dr. David Russell found establishing a charitable gift annuity through the OSU Foundation so easy that he forgot he had done it.

"On Dec. 31, I got a letter from OSU," says the retired radiologist from Enid, Okla. "When I opened it, I was surprised, because it wasn't a letter but a check."

That was the first of the fixed payments Russell will receive semiannually for the rest of his life. Eventually, the remainder of the gift annuity will significantly boost the OSU Medical Cowboys endowed scholarship fund he established with a gift in 2008.

"It's a good deal," Russell says. "It's a particularly good vehicle for people who have money that they don't need and they want to do something for OSU. At the same time, it may be part of their retirement or their financial plans but they don't want to totally lose control. And the return is good. It's very good."

For the 1965 pre-med alumnus, the charitable gift annuity was a great way to further support his passion for helping students go to college.



Through the Medical Cowboys, he hopes to encourage future doctors, dentists, nurses and other healthcare providers to follow his path by obtaining their undergraduate degree at OSU.

He says OSU's pre-medical education is as good as any university's, and the friendly culture is unmatched. In fact, he regrets that he only spent three years in Stillwater before utilizing a bridge program to enter medical school at the University of Oklahoma after his junior year.

"You can only go to college once, and once you leave, you don't ever go back," Russell says. "I think that extra year of college is worthwhile. If I had it to do again, I'd have stayed that fourth year so that I could have all those extra undergraduate experiences. I hope my support will help some students have those experiences."

Russell was actually a doctor before he was an OSU alumnus. While working toward his 1963 graduation from OU medical school, he initially forgot to file the paperwork transferring his credits to finish the bachelor's degree. That is why he officially graduated from OSU in 1965. He later

added a master's degree in public health from Johns Hopkins, which is one of the world's most prestigious medical schools.

"I understand very well the value of a college education," Russell says. "It's not just what you learn in a classroom, but what you learn in dealing with people, making friends and handling situations on your own."

While he was finishing his medical education, Russell applied for a commission in the Air Force to fulfill what he saw as an obligation to serve his country. He was surprised at how much he enjoyed the next 13 years, which he spent practicing in military hospitals.

He then transitioned to the Air Force Reserve when he and Dr. Dan Mitchell, another Enid native, partnered to establish Springs Radiology in their hometown.

"The biggest difference between serving in the military and private practice is the pay and that you wear a uniform in the service," Russell says. "That's not a bad thing because you always know exactly what you're going to wear and you don't have to pick out a tie."

Russell retired from the Reserve after 20 years and then retired from his practice 10 years after that. Now 10 years later, he is enjoying retirement from a lifetime of military and medical service by devoting both time and money to philanthropic service. He supports education, the medical profession, civic organizations and his church.

In fact, he donates the payment from his charitable gift annuity to charity.

"Because I don't need that money to live on, I plan my giving based on when I'm getting that check," Russell says. **"I've gotten so much satisfaction out of helping others. That's a very, very rewarding feeling."**

Russell admits that he was initially unsure about whether a charitable gift annuity made sense for him. Now he encourages others to check into it.

"I really needed to be comfortable with it because I was giving a significant amount of money," Russell says. "David Mays and the people at the OSU Foundation made me comfortable enough that I forget about it except for twice a year. It's a really good vehicle for giving."

HOW IT WORKS

A charitable gift annuity is a contract between you and Oklahoma State University Foundation. In exchange for transferring property to the Foundation, we pay you a fixed income for life. The payments can be quite high depending on your age, and a portion may even be tax-free.

TYPES OF ASSETS YOU MAY GIVE

If you fund your gift annuity with cash, a significant portion of the annuity income will be tax-free. You may also donate appreciated securities to avoid a portion of the capital gains tax.

START RECEIVING PAYMENTS NOW WITH A CURRENT GIFT ANNUITY

If you desire current income, you may transfer property in exchange for our promise to pay you fixed income beginning as early as this year. You will receive a current income tax charitable deduction for the value of your gift to the Oklahoma State University Foundation.

DEFERRED GIFT ANNUITY FOR INCOME AT FUTURE DATE

If you want to delay receiving income until a future date, such as when you retire, you can establish a deferred gift annuity. It offers a current charitable income tax deduction and the deferred payments are higher than those from a current annuity. Contact us about flexible date options for your future income.

Gift annuities are not available in every state, so we encourage you to contact us for details on availability and rates.

SISTERS CREATE PHILANTHROPIC LEGACY AT OSU

LOVE OF PETS, QUALITY VET CARE LEADS TO \$3.2 MILLION CONTRIBUTION

Though sisters Luella Curtis of Canton, Okla., and Leora Calkins of Tonkawa, Okla., have passed on, their generosity is providing veterinary scholarships for generations to come.

Calkins and Curtis left OSU estate gifts totaling \$3.2 million to show their appreciation for the OSU Veterinary Teaching Hospital providing exceptional care to animals and, specifically, Leora's beloved cat.

Luella was born June 3, 1915, in Billings, Okla. Just over two years later, on Aug. 17, 1917, Leora was born in their grandmother's home west of Billings. As young girls, Luella enjoyed singing and playing piano, while Leora enjoyed gardening and traveling. They both attended grade school in Enid and graduated from Canton High School.

On Dec. 20, 1931, Luella married Butch Curtis, and their union lasted until his death on Dec. 23, 1987. They farmed and raised cattle west of Canton for many years. They did not have children, but their animals were considered part of the family.

During World War II, Leora and her parents moved to Opportunity, Wash., to be near her brother, Wesley. He was serving in the then-Army Air Forces as a staff sergeant and stationed at Fairchild Air Force Base near Spokane, Wash. Leora worked for the Spokane Washington Air Depot during the war, then the Washington Water Power Company.

Upon returning to Oklahoma, Leora settled in Tonkawa. She worked for Conoco in Ponca City for 30 years before retiring. She was a frugal woman

humble about her wealth. She never married, and like her sister viewed her cats as family. She knew the importance of good veterinarians. Luella and Leora found that quality and compassionate care at OSU's Center for Veterinary Health Sciences.

Many people have been through the experience of having a beloved pet in danger, which first brings a sense of panic followed by an overwhelming appreciation for those who helped resolve the issue. Leora experienced this when her cherished cat became ill. It received excellent care at OSU, inspiring an incredible gift.

Because of the clinic's compassion and expertise, the veterinary center received the majority of Leora's estate as well as that of the Curtises. They hoped their contributions would further the education of future veterinarians who will spend their careers saving pets and treating animals. In that way, they sought to make a lasting difference for their fellow animal lovers.

Leora consulted with her financial advisor, Jodi Cline of Edward Jones in Ponca City, who provided valuable guidance in meeting her financial and charitable goals. Maintaining client confidentiality throughout the process, Cline consulted with the OSU Foundation in establishing the scholarship endowment, while making sure the sisters' charitable intent was honored. Such partnerships between a donor's professional advisors and the OSU Foundation help ensure the donor's passions are united with OSU priorities.

The sisters' combined gifts form the Luella Ruth and Butch Curtis Education Fund, which is awarded to CVHS students, with a preference for Oklahoma natives. Seventeen honorees were chosen this past year, with each receiving a \$10,000 scholarship.

Hilary Ludwig, class of 2016, says knowing the story behind the Luella Ruth and Butch Curtis Educational Fund made receiving the award even more special.

"It is so amazing to me that the OSU veterinary teaching hospital had such a monumental impact on an individual that the care and compassion provided to their animal inspired them to make such a large contribution to the future of animal medicine," Ludwig says.

The scholarship helped Ludwig by decreasing her student loans significantly.

"I am inspired every day to reflect this care and compassion through my daily life and future as a veterinary professional," Ludwig says.

Many of the scholarship recipients agree they are proud of this award.

"When I received the incredibly generous scholarship from Luella Ruth and Butch Curtis, I was moved to tears," says Kristen Kemper, a second-year veterinary student focusing on small exotic animal medicine and surgery. "Donations like these inspire me to hopefully reach a point where I can have the same impact on another student's life by funding scholarships."

“ I AM INSPIRED EVERY DAY TO REFLECT THIS
CARE AND COMPASSION THROUGH MY DAILY LIFE
AND FUTURE AS A VETERINARY PROFESSIONAL ”

HILARY LUDWIG



Leora Calkins



Luella and Butch Curtis



As the private fundraising organization for Oklahoma State University, **the OSU Foundation unites donor and university passions and priorities to achieve excellence.**

The Foundation manages donor dollars to provide the most advanced educational opportunities to students, faculty, staff, alumni and friends of the university. From scholarships to community programs, donors generously support the spirit and tradition of OSU.

We invite you to learn more about the OSU Foundation, its leaders and the individuals who help support the state's university by visiting OSUgiving.com. As always, please feel free to contact the OSU Foundation for additional information or visit us the next time you're in Stillwater!

