



WINTER 2014

HERITAGE

OKLAHOMA STATE UNIVERSITY FOUNDATION OFFICE OF GIFT PLANNING



*Walkaround is always a highlight of
America's Greatest Homecoming Celebration.*



Welcome to the WINTER 2014 issue of the Heritage Newsletter

Greetings from Stillwater!

December 31 will mark the official end of *Branding Success*: The Campaign for Oklahoma State University. The generosity of more than 102,000 donors to the campaign has resulted in \$1.2 billion in private support for our students, faculty, facilities and programs. Many of these gifts have been in the form of one of several charitable estate-planning opportunities available at the OSU Foundation. Thank you.

At the time of the writing of this letter, Congress has yet to extend the IRA Charitable Rollover legislation that expired in 2013. We hope this issue is addressed soon, and that any resulting legislation will not only be made retroactive for tax year 2014, but also made permanent going forward. We will provide an update when a final decision is made.

Also, the spring Heritage Society celebration is tentatively scheduled for Saturday, April 25, 2015, in Stillwater to thank those friends who have included OSU in some aspect of their estate plans. We hope our Heritage Society members can join us for a special gathering to get reacquainted and see firsthand some of the latest campus developments. Stay tuned in the coming months for more details. If you have provided for Oklahoma State in your plans but have yet to share that news with us, we encourage you to do so.

As you consider opportunities to include OSU in your charitable planning, please know the Office of Gift Planning is here to assist in any manner possible. We can provide information that can be of assistance to you and your professional advisers in this regard. Diana, Melinda, John, Nina and I look forward to being of service. For more information, we invite you to call us at 1-800-622-4678 or visit OSUgiving.giftlegacy.com.

David

David Mays

Senior Associate Vice President of Central Development

OSU FOUNDATION GIFT PLANNING TEAM

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



BACKYARD SUPPORT

Donors support OSU in many ways, including outright cash gifts, donations of property and estate-planning tools such as wills and trusts.

An opportunity that isn't as well known is the gift of mineral rights. **If you donate oil and gas royalties to the OSU Foundation, we can manage those assets in-house and help you achieve your charitable goals.** Whether the gift is an entire or undivided fractional interest, it can **significantly impact** many areas, including **scholarships, faculty, facilities and programs.**

Isn't turning something in your backyard into a gift that helps students an exciting thought?



For more information, contact the
Office of Gift Planning at 800.622.4678
or giftplanning@OSUgiving.com or visit
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GOING THE DISTANCE

Leslie Tieszen hails from Garden City, Kansas. She claims to be a “tomboy,” but her polished demeanor and crisp business suits match her position as senior vice president for Texas Capital Bank in Dallas. Tieszen flashes an easy smile and turns her attention to what’s important to accomplish today. She is happy and focused on finishing the details of her endowed scholarship agreement.

“I have found in my later years the joy in being able to share my success, not only with OSU, but also giving to missions, the food bank and my church. The old saying ‘It’s better to give than to receive’ is so true.”

Tieszen has made a provision in her estate which creates a large endowment for Oklahoma State University scholarships. Her mission: To help students who want to do well in their studies toward a degree, all the while tackling work and family obligations. The earnings from the fund will be given in her name in perpetuity.

Tieszen’s story is not unusual, but her tenacity and dedication are remarkable. The single mother of three grown children came to OSU to finish her college coursework begun at Fort Hays State University in Kansas. Over the years she learned her barriers to promotion and financial security would remain solidly intact unless she could finish. She reasoned: First finish rearing the children, and then address the last two years of college coursework. With young children at home, she earned her living in banking for the most part — the Bank of Oklahoma and the Bank of Texas. And along the way she developed specific skills. She is an accredited fraud-detection expert.



Leslie Tieszen makes gifts to support future college students such as her granddaughter, Autumn Rae.

She has worked with the Federal Bureau of Investigation to help with difficult and confusing cases that require accounting skills, especially during the 1980s when savings and loans were embattled. But despite a solid work ethic and respect from employers, she knew she was “stopped” until she finished her college degree.

Fast forward 20 years to today, and she is a respected professional in the healthcare banking field.

“When I enrolled and needed to complete my degree, which involved 90-some hours of coursework, my adviser’s first words were, ‘I don’t think that is feasible.’ What she did not know was that I only had so much money, and at almost 50 years of age I couldn’t be away from the workforce too long.”

Tieszen was undeterred. She cashed out her savings and went head-to-head with a daunting class schedule, finishing in two years as a member of the Oklahoma State University Class of 1996. She remembers her experience attending class with younger students.

“As a non-traditional student I was involved in group settings. Perhaps a typical student might be intimidated by an older person, but that was not the case. I was accepted as just another student. I did have a hard time stepping back and not running the show, however.”

Tieszen loves working at Texas Capital Bank.

“I feel so blessed every day that my company took the leap in hiring me. I work with incredible people in a profession that is ever-changing. Not only banking, but also healthcare: Both are under the microscope due to so many regulations.”

Tieszen says no one could have guessed that her return to campus almost 20 years ago would have been so beneficial.

“I was told over and over throughout my career in banking that because I didn’t have a degree I could only go so far up the ladder, which of course includes the monetary side,” she says. “Raising three children by myself with little financial help caused me to focus on improving my working position, and of course improving the message at home. Three growing children were my very

top priority. After the last child left home and went to college, I was so proud to see them all get the education I lacked. And to be honest, the only thing I ever wanted out of life was to get my college degree.”

Those years are just a memory now. She thinks of her young granddaughter, Autumn Rae, and what life will be like for her peers.

“I feel real concern for the next generations. They may not have the same opportunities as my generation, which means they will have to work twice as hard to make a dent in the competition around them. It is just not good enough to be the smartest or the high-achiever. There will be an uphill climb. I hope that with the Tieszen scholarship, and the other donors who make similar plans, that others can meet their personal challenges. Perhaps with the help of my scholarship, someone who could not foresee attaining that goal will actually earn a diploma and will know the invigorating power of finishing.”

AS YOU RETIRE, INSPIRE!

Many OSU alumni and friends have made the OSU Foundation the beneficiary of a portion of their retirement plan to support scholarships and other university programs, inspiring others to do the same.

INFORMATION FOR IRA GIFTS TO OSU FOUNDATION

(for use on your IRA beneficiary designation form)

Beneficiary Name:	The Oklahoma State University Foundation, an Oklahoma not-for-profit corporation having offices at Stillwater, Oklahoma, or its successor organization.		
Purpose (Optional):	Funds distributed from my IRA shall be used for _____[purpose]_____. (If this gift is for the creation of an endowment, then the terms of endowment should be set forth in a separate endowment agreement, to be referenced by the beneficiary designation form.)		
Tax ID Number:	73-6097060	Mailing Address:	400 S. Monroe Stillwater, OK 74076-1749
		Phone:	800.622.4678

As with any decision involving your assets, we urge you to seek the advice of your professional advisers when considering a gift to the Oklahoma State University Foundation.

A PATH TO SUCCESS



Susan and Jack Goertz display their love for OSU and bikes with an orange tandem.

Jack Goertz was raised on an Oklahoma farm between Medford and Wakita, whose combined population was less than 2,000. He says OSU prepared him to thrive in a big-city environment. Now he is giving back to help others find their path to success.

“OSU trains kids from small towns how to get along in the big, bad world,” says Goertz, who earned a bachelor’s degree in 1972 and master’s degree in 1974, both in industrial engineering. “My teachers and instructors, deans, the whole structure was there to help you. They answer your questions and they give you the support that some of us needed after coming from a place where you know everyone. They help you find your interests and figure out how to pursue them.”

Goertz followed his interest in engineering to Birmingham, Alabama, where he spent 28 years with the Southern Company before retiring in 2001 as a senior analyst in the Information Resources department.

Birmingham is where he met another engineer who became his wife, Susan. Their shared belief in philanthropy has led them to establish endowments for a faculty chair and for a student mentoring scholarship in engineering. The scholarship is part of an initiative led by Paul Tikalsky, dean of the College of Engineering, Architecture and Technology.

“It’s so valuable to have somebody help students transition from their hometowns to engineering,” Goertz says. “I had a great support staff in the IE department at OSU, and I lived on a great floor in the dorm (Kerr-Drummond) – some of the people from that floor are still friends today – but we didn’t have a formal mentoring structure then. When Dean Tikalsky explained the Mentoring Program he’d established, I knew this was a way I could give back to OSU Engineering.”

Goertz sees the scholarship and chair as two ways to support the same group. Mentors will help new engineering students, and the chair-holder will provide the highest-quality instruction in advanced subjects.

The couple is funding these endowments two ways: with a living trust bequest, and with immediate contributions to support scholarships today.

“Since we have no children, the planned gift allows us to direct the funds when the time is right,” Goertz says. “We can make donations now and hopefully we’ll be able to build the deferred gift to even more than we pledged.”

The planned gift includes the Grant County farm where Goertz grew up.

“I bought it after moving to Alabama because I wanted to keep close ties to Oklahoma,” Goertz says. “I’m still an Oklahoman, and I like the idea of keeping our land in Oklahoma for Oklahomans. Whatever happens to that land, it will benefit OSU.”

Goertz’s passion for OSU also led him to help establish the Birmingham OSU Alumni Watch Club. He encourages anyone who would like to get involved to email birmingham@orangeconnection.org.

Goertz also discovered a passion for bicycles while living in Stillwater. During his college years, he worked at Cooper Cycle Center and later for Wheeler Dealer Bicycles. He especially enjoyed tandems, which accommodate multiple riders. They allow for increased speed and a shared experience even for riders of different abilities.

When Goertz moved to Alabama, he became a partner in a local shop, Bob’s Bikes Inc., and began promoting tandems in the Southeast. That was how he met Susan, another bicycle lover with whom he has ridden many miles throughout much of the United States, bits of Canada and in western Europe.

“Our first date was a tandem ride in 1980, and we hit it off pretty darn well,” Goertz says. “We married in 1981.”

Three years later, they established Tandems Limited and Recumbents, Too. Since its humble beginnings, Tandems, Ltd has sold tandems, recumbents and parts to thousands of customers in all 50 states and nine foreign countries.

Goertz explains that recumbents have longer frames than traditional bikes, allowing a rider to recline against an ergonomic seatback and distribute weight over a larger area.

“Your neck pain goes away and your back pain goes away,” Goertz says. “If you have balance issues, a recumbent trike may be right for you. Climbing hills is the only place a novice recumbent rider is at a disadvantage, compared to someone riding a traditional diamond frame.”

Goertz also loves motorcycles. Since 1963, except for a short time in 1974, he has had at least one motorcycle parked in his garage. In his spare time, he volunteers at Barber’s Vintage Motorsports Museum in Birmingham, which is recognized by Guinness as the world’s largest collection of motorcycles.

“I enjoy taking two wheels whenever I can, be they motorized or non-motorized,” Goertz says. “If it’s too far to pedal – such as when I come back to Oklahoma – I’ll generally ride a motorcycle.”

Along with advocating for two-wheeled transportation, Goertz also has advice for those who love OSU.

“I encourage people who want to help OSU to look at their own financial situations and the many options the OSU Foundation has for deferred or planned giving,” Goertz says. “It gives you the opportunity to be counted as a future large donor and also lets the university plan for the future.”

“ I encourage people who want to help OSU to look at their own financial situations and the many options the OSU Foundation has for deferred or planned giving. ”

----- JACK GOERTZ -----

CAREER EDUCATOR GIVING BACK TO HELP FUTURE OSU STUDENTS



Orlando Hazley's home is full of carvings he has made over the years.

Orlando Hazley downplays what he accomplished on the track in 1957, when **he became Oklahoma State University's first black letter-winner in any sport**. He capped his athletic career in 1959 by earning Big Eight titles in the 220-yard dash, the 440-yard relay and the mile relay.

More important to him is 1960, when he completed his physical education degree and began a career of more than 30 years as an administrator, teacher and coach for Oklahoma schools. He constantly reminded students that even the extremely rare athletes with the potential to play professionally have no guarantees. **Thus athletics should be viewed as a means to an end of earning a degree, not as an end itself.**

To thank OSU for his athletic scholarship, **he is using a living trust bequest to establish a scholarship named after himself and his late wife, Velda**. Recipients must fulfill only two criteria: a minimum GPA of 2.5, and full-time enrollment in the College of Arts & Sciences.

“ *I just want to help kids,” Hazley says. “I wish I could give more. I hope the recipients, whether they are athletes or not, will get degrees. That’s what’s important.* **”**

If you are interested in following Hazley's example of reflecting your unique orange passion through personalized support, please contact the OSU Foundation Office of Gift Planning at **800-622-4678** or visit **[OSUgiving.giftlegacy.com](https://osugiving.giftlegacy.com)**