

SUMMER 2015

HERITAGE

OKLAHOMA STATE UNIVERSITY FOUNDATION OFFICE OF GIFT PLANNING





*Welcome to the **SUMMER 2015** issue of the Heritage Newsletter*

Greetings from Stillwater!

We had a wonderful Heritage Society celebration on Saturday, April 25, in Stillwater to honor those friends who have included OSU in their charitable estate planning. With approximately 100 in attendance, the group enjoyed our student-led a cappella group Pokeapella, First Cowgirl Ann Hargis highlighting our pet therapy program Pete's Pet Posse, and a series of historical presentations during lunch at the Edmon Low Library. A few photos from the event are shown at right.

Included in this issue are stories about some of our friends who have made estate-related gifts to Oklahoma State, and the impact these gifts have had and will continue to have on our students. Many such gifts blend a combination of estate giving with outright, lifetime support as well.

As you consider opportunities to include OSU in your charitable planning, please know the Office of Gift Planning is here to help in any manner possible. We can provide information that can be of assistance to you and your professional advisors in this regard. Diana, Melinda, John, Nina and I look forward to being of service.

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.

For more information, we invite you to complete and return the enclosed reply card, call us at 1-800-622-4678, or visit online at OSUgiving.com.

Go Pokes!

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





President Burns Hargis welcomed Heritage Society members to the Student Union Theater



Student singing group Pokeapella performed four songs, including the Alma Mater



Attendees enjoyed a delicious lunch in the Edmon Low Library's Browsing Room



Edmon Low Library staff spoke about the iconic building's history and brought OSU yearbooks to review



Burns and Ann Hargis brought Scruff, the family's dog, to help explain OSU's pet therapy program, Pete's Pet Posse



Heritage Society members showed their orange pride throughout the day

Now & Later

A Blended Gift for American Veteran Support

Donor and alumnus Bernard Gervais served in World War II as a member of the Navy and later received a commission in the Army. His total service covered 20 years, including his vivid recollection of the 1945 atomic bombings of Hiroshima and Nagasaki.

"I was at Ford Island in Hawaii as a member of the communications staff, and we were not allowed to celebrate Victory in Japan Day because of uncertainty," Gervais said. "We spent the day in a Quonset hut with shore patrolmen guarding both doors. No one could enter or leave. The extra precaution to guard all communications resources was only prudent, though, in the fog of war."

Gervais was later stationed in Sasebo, Japan, about 50 miles from the site of the Nagasaki bombing.

"I am grateful to President Truman for averting an invasion of the island, which would have endangered and killed many more on both sides of the conflict," Gervais said.

Bernie, as he likes to be called, attended a Catholic grammar school in Southbridge, Massachusetts. The son of a "self-made man who studied law and civics in the evenings," he learned that to give to others was not only laudable, but expected. His father volunteered by helping poor people file their tax returns and fill out citizenship forms.

Gervais joined the Navy after high school in 1943 and trained in New York, Texas and California, specializing in Morse code. Like many others, he was inspired to join the service after the Japanese bombing of Pearl Harbor in 1941. His training began at Sampson Naval Base in Geneva, New York, followed by radio operations training at Texas A&M.



Bernard Gervais wearing his Army uniform in the mid-1950s

During WWII, a radio man was a petty officer who transmitted and received messages using specific naval communications procedures. His duties included copying messages using Morse code on the typewriter, decoding headings and routing messages to Naval Headquarters. Amphibious training ensued, and then more training in the communications field prepared him for embarkation on a Landing Ship Tank with a destination of Pavuvu in the Russell Islands, which was the staging area for the 1st Marine Division. He spent three months there as a part of the 5th Regiment.

The time came to board the personnel carrier, termed an APA. Destination: The invasion of Peleliu on Sept. 15, 1944. Students of the Pacific Theatre will remember this particularly ghastly battle on a two-miles-by-six-miles volcanic island. Cave after cave hid the enemy, who had the advantage over the incoming marines. Soldiers advancing on the island had to push the Japanese out of a building for the communications staff unable to traverse the rocky volcanic soil in a van.

Returning home after discharging from the Navy, Gervais accepted the advice of his employer to utilize the GI Bill at Oklahoma A&M, where he began in fall 1947.

"In Stillwater I lived in 'Oretoopa Halls,' which were the tar-paper shacks for servicemen who were students during WWII," Gervais said. "I was a Theta Chi, and joined the Advanced ROTC. After graduation, I went to Aberdeen Proving Ground and then on to Korea for 19 months. Over the years I have served in many locations: White Sands Missile Range, Fort Churchill in Canada, in Germany and I worked as an associate professor at the University of Maine."

Bernie gives great credit to his wife, Betty, who is now deceased. He met her on a blind date in 1952, when she was working as a psychiatric nurse in Aberdeen, Maryland. He soon proposed, saying he had enough love for both of them, and they enjoyed over 60 years of marriage. Though Betty and one of their daughters are gone, he still lives in their home built to her specifications many years ago. Their three daughters were reared there, and she ran the household, much of it alone as Bernie served all over the world.



Bernard Gervais today

A planner and a reader, Bernie contacted the OSU Foundation after reading a Heritage newsletter about creating a legacy gift. He settled on creating an endowment to support veterans enrolling in the Spears School of Business, starting it with a gift of stock to be augmented later through an estate gift. Bernie looks back on an interesting life of service. He is grateful for the GI Bill that benefitted him and so many others, but he says the GI Bill of today is not as generous in its financial support.

"My reason for this endowment is in support of veterans," Bernie said. "It is a way of giving to those in need."

For more information about supporting veterans in the Spears School of Business, please contact Diane Crane, Senior Director of Development, at dcrane@OSUgiving.com or 405.385.5665.

Blended Gifts Immediate and Long-Term Impact

Think about a combination of gift options to maximize your giving to Oklahoma State. With these blended gifts in your overall plan, you can fulfill your philanthropic goals and see the impact of your giving today. The future of Oklahoma State University is more solid because of your foresight.

For example, your annual gift can be promoted beyond your lifetime by setting aside a portion of your estate to endow a named fund. Once endowed, the earnings from the fund stand in for the annual gift that you would have otherwise made. Your annual gift continues in perpetuity.

Most of us understand the concept of a bequest from a will or trust. Other planned gift options that can be effectively used in conjunction with lifetime gifts include retirement plans, charitable gift annuities, and charitable remainder trusts. In this way, you again promote your annual gift beyond your lifetime and into the future, continuing that support in perpetuity.

Or, in the alternative, if you have already established a planned gift using one of these methods, you could begin enjoying the immediate impact of your philanthropy today by donating outright gifts of cash or property. Additional benefits include avoidance of capital gains tax with gifts of real estate, stock or other appreciated investments.

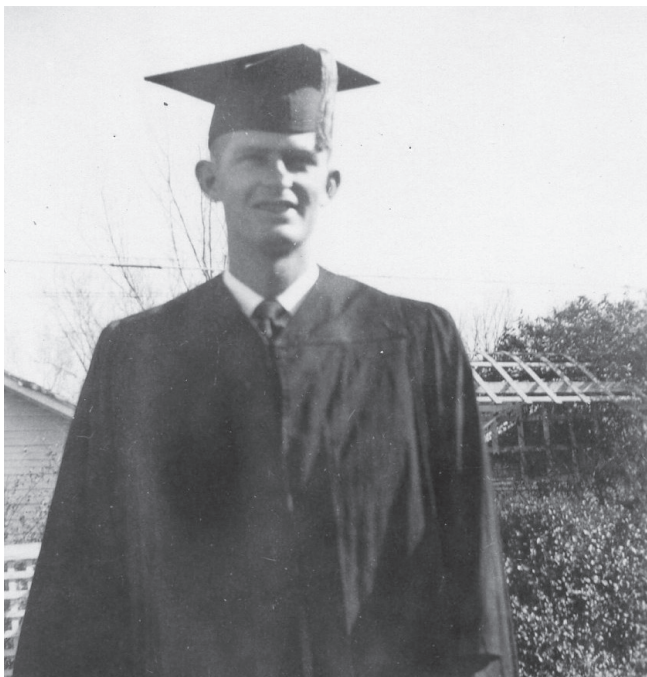
Blended gifts utilize a variety of giving strategies by combining the power of current, lifetime gifts with plans that extend your philanthropy past your lifetime. This legacy arrangement provides a pipeline of future support for the university, and can make sense for your estate planning goals. Check with your advisor about your particular situation, and consider blended gifts to optimize your impact on the future of Oklahoma State University.

For more information, please contact the Office of Gift Planning at 800.622.4678 or giftplanning@OSUgiving.com.

Continuing the Family's Giving Legacy

Thanks to the generosity of two generations of the Burns family, four endowments will provide perpetual scholarship support every year at Oklahoma's two largest universities.

Bob Burns became a first-generation college graduate in 1950, with his Oklahoma A&M business degree preparing him for a successful accounting career in the oil industry. When his mother passed away in 1977, Burns honored his parents by creating the Amon & Myrtle Burns Memorial Scholarship at OSU.



Bob Burns

Based upon guidelines established by Mr. Burns and his late wife, Mary Sue Cowden Burns, the fund was substantially increased by his estate when he passed in 2014 by leaving 40 percent to the endowment and 40 percent to a mirror fund honoring his wife's family at her alma mater, the University of Oklahoma. He bequeathed the other 20 percent to his nephew, Richard Burns, who was executor of the estate.

Richard, an OU graduate and retired petroleum engineer, used the inheritance to honor his aunt and uncle by establishing the Bob G. and Mary Sue Cowden Burns Endowed Memorial Scholarship at OSU and a matching endowment at OU.

"Originally, Bob had planned to create a scholarship in his own name but he changed his mind and funneled those funds into the Myrtle Burns Scholarship," Richard says. "I was in good enough financial shape that I was able to re-establish that scholarship as a tribute to him. I felt like he did such a great thing by establishing the scholarships and I wanted to honor him for that."



Bob Burns and his wife, Mary

Bob Burns was the fifth of six children. His father died in 1934, and the family's financial situation was bleak during the Dust Bowl and Great Depression. But the now-widowed Myrtle Burns, a former teacher, did everything she could to provide for her family and encourage their education. Not all of her children were able to attend college, but even those who didn't attend college encouraged their own children to pursue degrees. Grandma Myrtle was always there to push Richard and her other grandchildren to follow the example of Uncle Bob.

"My grandmother was the driving force for all of us to go to college," Richard says. "She was a very hard-working and intelligent lady. She had a strong will and was also very loving."

Richard adds that Bob inherited many of her traits, with his intelligence, hard work and attention to detail key to his professional success.

"He was my favorite uncle," Richard says. "He was just a super guy."



Bob Burns and his mother, Myrtle

The two scholarships Bob established are open to juniors and seniors who have jobs and went to high school in the same communities that he, his wife and his mother called home. Richard followed that example by creating two scholarships to support juniors and seniors from the same communities as himself and his cousins.

"Everybody needs a good education — as high as possible," Richard says. "My uncle thought the education he got at OSU was instrumental in him having a really good life. Realizing how hard he worked to pay for college, he wanted to do whatever he could to help others in the same circumstance. My cousins and I also worked our way through college and we wanted to honor our aunt and uncle and do whatever we could to help college kids in similar circumstances."



Richard Burns

If you are interested in honoring your family through a planned gift, please contact the Office of Gift Planning at giftplanning@OSUgiving.com or 800.622.4678.

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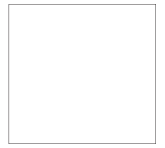
———— RICHARD BURNS ————



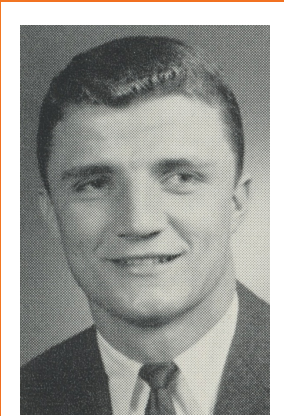
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Helping Others Accomplish Their Goals



William "Mike" McDowell of Overland Park, Kansas, is a two-time retiree. He proudly served his country in the Navy, then retired from a microbiology career after producing animal vaccines for Bayer. He credits much of his professional success to his experiences at OSU, where he completed a microbiology degree in 1961 and later pursued some graduate study.

"I began working as a research assistant for a bacteriology professor even when I was an undergraduate," McDowell says. "I look back and see that it was very productive and helpful for me."

It was with that in mind that he and his wife established a bequest to create the William and Nancy McDowell Scholarship Fund, which will support Arts and Sciences students with documented financial need.

"It feels really good to know my gift will be helping people who deserve it," McDowell says. "There are so many people in need and this is a way to help them accomplish their goals."



**It feels really good to know my gift will
be helping people who deserve it."**

MIKE MCDOWELL

If you are interested in helping future generations of OSU students through your estate plans, contact the Office of Gift Planning at 800.622.4678 or giftplanning@OSUgiving.com.