

 UNIVERSITY OF WYOMING FOUNDATION

# COWBOY LEGACY

FALL 2016



# COWBOY LEGACY

*Cowboy Legacy* is published twice a year and sent to friends of and donors to the University of Wyoming. We encourage you to share your questions or comments regarding this newsletter.

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# ‘BUCKLE DO

UW alums Tori Campbell (business administration '91) and John Keefauver (architectural engineering '91) have worked hard and achieved much success in their lives. Because of that, they wanted to pass along their good fortune, and so they included UW in their estate plans, which will provide support for business, engineering, and athletics. On top of their planned gift, they also established the Buckle Down Scholarship last year through an outright gift.

“We both had the great fortune of coming through college, being employable and not having any debt,” says Tori. “In today’s world, I think that is a pretty significant offer that the university makes. So we are thrilled to be part of the alumni base that can help try to promote that kind of situation for our near-term students.”

Tori and John have a strong connection to UW. They both were honored with scholarships to attend UW and were part of the Honors Program. Many of their family members graduated from UW, John’s mom Linda was an associate professor in the College of Education, and he attended the Lab School and Laramie High. Four consecutive generations of Tori’s family have been UW students. Tori and John also have been season ticket holders for more than twenty-five years, and they enjoy home and away Cowboy football games.

# OWN' LEADS TO SUCCESS

Their biggest connection may be that they met their senior year at UW—in an Honors colloquium classroom.

Today, Tori is president and co-founder of Mizzen Energy, and John is an architectural engineer in Denver. A Distinguished College of Business Alumna, Tori also serves on the College of Business Advisory Board.

Tori and John established the Buckle Down Scholarship that supports scholarships for undergraduates enrolled in the College of Business who have at least a 2.6 GPA. Preference is given to students who are also pursuing an engineering degree, female students, and working students.

“John and I both had to work as we were going through college, and looking back we feel that that was a helpful situation that allowed us to balance our life and develop important skills as we went into the work force,” says Tori. “So Buckle Down is meant to emphasize that the students of today likely have to buckle down too. Our award will be given with a preference to those who are willing to be students and employees as they pursue their education.”

Tori and John have been annual giving supporters of the university for decades—their first gifts came even before they graduated. Their gifts



have supported business, engineering, education, student life, and athletics.

Tori and John would encourage others who are considering gifts or setting up their estates to consider UW in their philanthropic plans.

“One of things I admire most about the university and the foundation is that there are so many giving opportunities that I think any donor would find a place of passion,” says Tori. “I would certainly encourage any prospective donors to take a look at the choices. There are so many, and I am confident that something will really resonate.”

She adds, “You’re never too young to start building your legacy. Even if it’s \$25 a year, really building that discipline and being a part of something that has been so great, including the University of Wyoming, can make a lasting impact. We hope that others will find their place also.”

# THE IMPACT OF PLANNED GIVING

**A**lfred and Mary Lou Pence epitomize how estate gifts can have a major and lasting impact on the University of Wyoming. Both Al and Mary Lou attended the University of Wyoming, he in law and she in education. Al served in the U.S. Army in World War II, retiring as a Lieutenant Colonel. He served as city attorney and shut down Laramie's last brothel. He served as a litigator throughout his life and participated in a jury trial one week before he passed away in 1977. She was a historian and an author, co-authoring *Ghost Towns of Wyoming*.

Together, through their estate, the Pences established scholarships that benefit students across campus.

- The Mary Lou Pence History Scholarship for senior history majors with an emphasis in Wyoming history
- The Alfred M. Pence Public Speaking and Debate Scholarship for juniors in public speaking and

debate who have potential as public speakers, with preference for those going into law

- The Alfred and Mary Lou Pence Pine Bluffs Scholarship for Pine Bluffs high school students with potential to continue in business or professional entertainment and have a deep and sincere sense of patriotism and loyalty to their community and nation
- The Mary Lou Pence Chi Omega Sorority Scholarship for junior members of the Chi Omega Sorority based upon personal charm, scholarship achievements, and financial need
- The Mary Lou Laramie High School Senior Scholarship for Laramie High School seniors to attend UW
- The Alfred M. Pence Law Scholarship for junior law school students who are Wyoming high school graduates who have the greatest potential as private practice trial lawyers

## Planned Giving By The Numbers

FY 2016 REALIZED  
PLANNED GIFTS **\$1.2 MILLION**

FY 2016 UNREALIZED  
PLANNED GIFTS\* **\$8.2 MILLION**

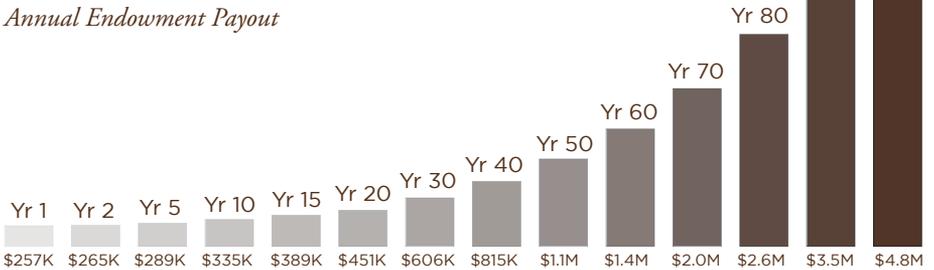
\* Unrealized planned gifts are estate gifts about which the donor has notified the UW Foundation and has designated that it benefit a specific area or areas on campus.

# THE LIFE OF AN ENDOWMENT



The advantage of establishing an endowment is that your gift's value and impact have the ability to increase over time. Here's an example. These charts show 1) the total value over time of a \$250,000 endowment (assuming a market rate of return of 7%) and 2) the annual payout to the college or program of your choice (assuming a payout rate of 4%) after the initial one-year waiting period.

*Annual Endowment Payout*



*Value of Endowment*

TOTAL REALIZED BEQUESTS **\$149,505,594**

TOTAL NUMBER OF GIFTS **499**

AVERAGE GIFT AMOUNT **\$299,610.41**

## ASK CLAYTON



**Q.** What is the easiest way to fulfill my philanthropic goals by creating a lasting legacy at UW?

**A.** When I visit with donors, their most common goal is to create a lasting legacy at the University of Wyoming. Many of our alumni recognize the role that their education and experience at UW played in their financial success and the direction of their lives. Because that transformative experience led them to a career and family, many donors hope to help future generations with their own goals of “breaking through” to a lifetime of success.

This goal can be accomplished by creating a fund in the department of your choice to support students, faculty, or programs. Endowed scholarships help students, endowed professorships help faculty, and endowed excellence funds—a fund that is used at the discretion of the dean or department chair to address the most

pressing needs of a department—help programs. By endowing a fund at UW, you are investing in the future of UW for generations to come. Endowed funds are invested with the goal of producing a meaningful annual payout that is used according to your wishes while balancing payout with long-term growth.

Gifts of \$25,000 and above can create a permanent endowment with a purpose customized by each donor. In addition, many people who choose to create a fund through their estate (will, trust, IRA beneficiary designation, life insurance policy, or charitable gift annuity) opt for creating an expendable fund now in order to experience the impact of their fund during their lifetime. This expendable fund is coupled with a larger estate gift to the same fund after their lifetime. A named non-endowed fund that benefits the area of your choice can be created for a gift of \$5,000 or more. By creating a fund now, you can see if the fund is having your desired impact and make changes, as well as hear from students and departments that benefit from your generosity.

If you are interested in creating a lasting legacy here at UW, please contact me. I’m happy to help in any way I can.

*This column features questions and answers that donors may have regarding certain aspects of Planned Giving.*

# THE MICK AND SUSIE MCMURRY HIGH ALTITUDE PERFORMANCE CENTER

The Mick and Susie McMurry High Altitude Performance Center is a \$44 million renovation and expansion of the Curtis and Marian Rochelle Athletics Center that will more than double the size of the current facility. A groundbreaking ceremony will take place October 29 before the UW – Boise State University game.

This remarkable public-private partnership will expand the center's 48,000 square feet into a 114,000-square-foot premier collegiate athletics complex. A stunning presence approximately 50 feet from the north end of the War Memorial Stadium playing field, the High Altitude Performance Center will incorporate UW's signature sandstone architecture.

The High Altitude Performance Center will be funded by a \$24 million private support campaign and a \$20 million State of Wyoming matching program. A \$3 million leadership

gift from Marian Rochelle, doubled to \$6 million by state matching, launched the project. Marian and her late husband Curt were the lead contributors to the Rochelle Athletics Center in 1998. When this initiative is complete, the facility will become the premier athletics center in the Mountain West Conference, featuring new or expanded spaces focused on academic success, nutrition, strength and conditioning, sports medicine and rehabilitation, and recovery facilities for all of Wyoming's more than 400 student-athletes.

The High Altitude Performance Center will also ensure that UW capitalizes on its greatest competitive advantage—physical training for young men and women at 7,220 feet. The thin air of the Rocky Mountains provides an opportunity for Cowboys and Cowgirls to gain unique conditioning that cannot be achieved at lower elevations.



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We are here to help you and your estate planning team. If you have made UW part of your estate plan, we encourage you to contact us so that we can properly document your intentions and express our sincerest thanks.

*The UW Foundation is an independent, nonprofit corporation dedicated to securing, managing, and stewarding private gifts in support of the University of Wyoming's missions in teaching, research, and public service.*

## CONTACT US

To learn more about your options for estate planning, please contact:

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