

COWBOY LEGACY



UNIVERSITY OF WYOMING FOUNDATION

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Maj. Gen. Pamerleau Establishes an Endowment to Support All UW AFROTC Students

By TAMARA LINSE

What does Major General (ret.) Susan L. Pamerleau care about?

“Living life to the fullest, and making a difference in the way that I can,” says Gen. Pamerleau. “Where I think I can help the best is in making sure my estate can do the kinds of things that I am passionate about, and that’s making sure that young people have opportunities.”

Although she would not be the one to tell you, Gen. Pamerleau’s list of accomplishments is a long one. Among them, she is the retired Deputy Chief of Staff for Personnel for the U.S. Air Force, she has served as an executive officer on the International Military Staff at NATO Headquarters in Brussels, Belgium, and she is the first woman to command the Air Force Reserve Officer Training Corps (AFROTC).

Her latest accomplishment is creating a bequest that will support scholarships for all UW AFROTC students in good standing. About fifty students per year participate in this program, although the number has been as high as a hundred.

“I don’t have heirs,” Gen. Pamerleau says. “I can place my money, my investments,

my estate, to do the kinds of things that I think are important. And to me young people serving our country and making sure that we have diversity in our leadership in our armed forces is important.”

Military training at UW began in 1891, with the establishment of a School of Military Science and Tactics, and in 1916 UW was among the first educational institutions in the nation to institute the ROTC program. Since then, the program has graduated many high-ranking members of government and the armed forces, including General (ret.) Peter J. Schoomaker, U.S. Army Chief of Staff (the highest ranking officer in the Army).

Gen. Pamerleau’s interest in scholarships began in 2000 when UW’s AFROTC detachment commander asked to name an award after her. In about 2004, Gen. Pamerleau found out that the award had no scholarship attached to it, so she began funding one, and then funded two in 2008.

“At that point in my life, and in my work life, I had the means to do those kinds of things and felt like this was an important thing



MAJ. GEN. PAMERLEAU

to do,” says Gen. Pamerleau.

While in command of AFROTC, Gen. Pamerleau learned about a San Angelo State University endowment funded by the Carr family that supported all qualified AFROTC students. This was the inspiration for her bequest.

“If you’re passionate about something, if you see a need for something, then why not make sure that that love, that passion, that interest, benefits from your estate,” says Gen. Pamerleau. “The key to it is consciously sitting down and thinking about what the future is and getting someone to help you walk through it.”

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COWBOY LEGACY

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

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Message from Ben Blalock

DEAR FRIENDS AND ALUMNI OF UW,

Throughout the course of our lives, we frequently seek opportunities to make a positive impact on our world—ultimately with aspirations to leave a legacy that will ensure our lives have lasting meaning. Estate gifts can touch the lives of others for generations.

The UW Foundation is here to assist anyone who wants to explore how an estate gift may support the university's students and faculty for years to come. The University of Wyoming is indeed a remarkable school. UW's successes during the past decade are propelling our university to national stature—Forbes.com recently ranked the University of Wyoming 17th among "America's Best Public Colleges" and fifth among "America's Best College Buys." Private giving, coupled with a strong base of public funding, continues to elevate UW to new heights of excellence.

Estate gifts provide opportunities for individuals to make significant gifts—gifts that many feel they cannot make during their lifetimes. Statistics document that almost 75% of the total dollars received as a result of the largest private gifts to charitable organizations each year come through estate gifts. These estate gifts have played a major role in transforming UW programs through the years.

An extraordinary planned gift that has significantly impacted the university and its students came through the generosity of Clara Raab Toppan. Clara graduated from UW in 1931 and was the first female CPA in Wyoming. She willed her 160-acre Lodge Pole Ranch near Wilson, Wyoming, to UW, and its sale brought over \$17 million to UW—the university's single largest gift. Clara's philanthropy is being used to support programs campus-wide: the American Heritage Center's rare books collection, the College of Business, and Athletics. It provides scholarships for students and endowed chairs for faculty.

Retired rancher Violet Dinwiddie, who is 100 years old, wanted to help ranch kids, and she was able to do so through the creation of a charitable remainder trust.

Stories regarding two of UW's special alums are detailed in this newsletter—Major General Pamerleau on the front page and Linda Wells on page 3. They are individuals who have made significant commitments to Wyoming's university through their estates.

Last year, the UW Foundation strengthened its investment in estate giving. Tracy Richardson was hired as the Foundation's Director of Planned Giving. Tracy comes to us from Casper by way of Florida, where he practiced estate planning and wealth preservation. He received degrees in business and law from UW, as well as a Master of Laws in taxation from the University of Florida. He and his wife Cebee are both from Wyoming. They have a young son, T.R. The Richardsons are fully committed to UW and the great State of Wyoming. Tracy is available to answer any estate gift questions you might have. Please feel free to contact him at (307) 766-3934 or trichar6@uwyo.edu.

The UW Foundation greatly appreciates the generosity of UW's alumni and friends. You are making a difference in our world. Serving you and the entire UW family is a privilege and a pleasure.

Sincerely,

Ben Blalock
UW Foundation President/CEO



"Estate gifts provide opportunities for individuals to make significant gifts—gifts that many feel they cannot make during their lifetimes."

BEN BLALOCK



UW Pharmacy Receives \$1.1 million gift

By UW NEWS SERVICE

A more than \$1.1 million gift from the charitable remainder trust of Wyoming native Dr. Linda Wells (B.S. pharmacy '70) to the University of Wyoming School of Pharmacy will help fund graduate assistant research and provide scholarships for UW pharmacy students. It is the largest gift ever presented to the pharmacy school.

Wells, who died Dec. 14, 2008, was a longtime benefactor of the UW School of Pharmacy. The Pharmacy Learning Resources Center will be named after her, the "Linda Wells Student Learning Center." A dedication is scheduled for Friday, September 25th at the School of Pharmacy.

The income from the endowment will fund the graduate assistants and will provide scholarships and cash awards for two pharmacy students to attend the annual Academy of Managed Care Pharmacy meetings each year.

"With this remarkable gift, the school is on track to meet or exceed our goal by May 2010, the 60th anniversary of the first graduating class of the School of Pharmacy," says Dean John Vandel.

The gift is part of the Dean David W. O'Day Finance Campaign to raise, by May 2010, \$3 million in endowed funds for the UW School of Pharmacy, Vandel says.

"Linda was a very caring and generous person," says



"With this remarkable gift, the school is on track to meet or exceed our goal by May 2010, the 60th anniversary of the first graduating class of the School of Pharmacy."

JOHN VANDEL
DEAN, UW SCHOOL OF PHARMACY

her brother, Pearley Wells of Casper. "She was always there to help—not only her family, but numerous friends as well as strangers. Linda gave to many different causes, whether it was homeless people that needed a helping hand or youth groups across the state. She truly believed that an education was a very important part of life."

Linda Wells was raised in Worland and moved to Casper where she attended Natrona County High School. She earned a B.S. (1970) degree in pharmacy at UW, and in 1983 she received an M.S. degree in

mental health and a Ph.D. in chemical dependency, both from Columbia Pacific University.

While in college, she belonged to the Kappa Epsilon Fraternity (for women in Pharmacy) and Phi Kappa Phi and was named to Who's Who among students in American Universities and Colleges. An avid lifelong learner, Wells later attended Harvard Business School and received a certificate in business management.

"I was blessed to attend her Harvard Business School graduation," Wells adds. "That

was where I really learned how respected Linda was from her friends throughout the world."

While working in pharmacies and benefits management, she recognized an opportunity in the industry and started her own successful business in that area in California. Wells was one of the first woman pharmacists to be a leader in the practice of managed care pharmacy.

She was a UW College of Health Sciences advisory board member, on the UW School of Pharmacy advisory committee, and a member and sponsor of the Academy of Managed Care Pharmacy. She petitioned and earned the first membership for a single woman to Jackson's Rotary Club.

Wells was honored as the UW School of Pharmacy's 2005 Alum of the Year for extraordinary contributions to her profession and to the school.



COWBOY LEGACY

UW Building an Incredible Future

The University of Wyoming is building toward an incredible future, and a glimpse of that future can be seen in the construction across campus. Many of these projects were supported by private gifts.

The Robert and Carol Berry Center for Natural History and Conservation will consolidate research and education collections of the life sciences located throughout the UW campus.

William Robertson Coe Library has been upgraded with a spectacular modern 92,765 square foot addition, as well as renovation of the existing space.

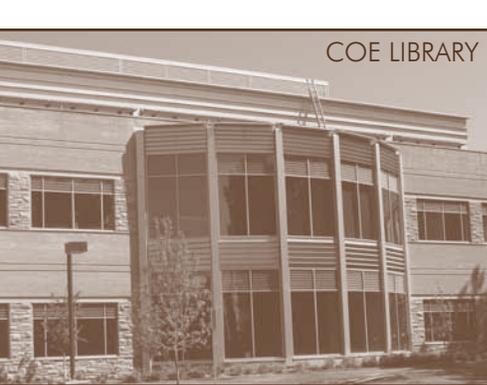
The College of Business changes include a remodel and renovation of the existing 53,000 square foot space and the construction of an additional 112,000 square feet that bring together all the college's departments into one location.

The Honors House was formerly the Kappa Sigma house and is an opportunity for students to be surrounded by others with similar academic goals and work ethics.

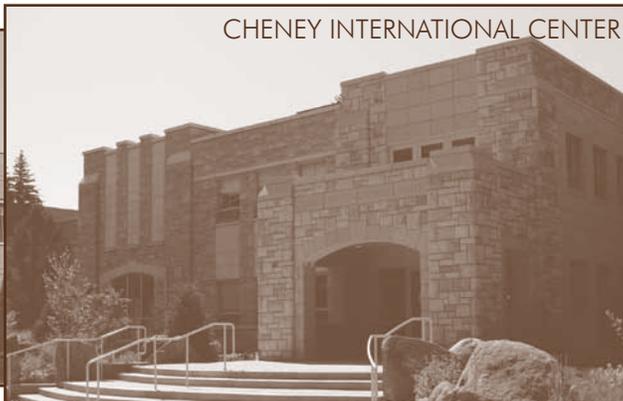
The Cheney International Center is a portion of the Student Health Center that has been renovated for the Cheney International Center, which acknowledges the importance of international studies in tomorrow's career success.

War Memorial Stadium is being modernized with a new stadium club, renovation and expansion of the concession areas, restrooms, and the lower concourse on the east side of the stadium. Twelve suites, the stadium club area with 250 indoor seats, and a dining and concession area on the upper east side of the stadium will be added.

The William N. Brimmer Legal Education Center includes a large moot court room, jury deliberation room, and judges chambers with state-of-the-art audio visual equipment so it can also be utilized as a classroom.



COE LIBRARY



CHENEY INTERNATIONAL CENTER



WAR MEMORIAL STADIUM

Primary Foundation Contacts for Units and Colleges

Although UW Foundation staff will work on a variety of projects across the UW campus, these individuals will be the primary fundraising points of contact for the following areas.

Agriculture	Stephanie Anesi	(307) 766-1800	sanesi@uwyo.edu
American Heritage Center	Laura Baxter	(307) 766-1802	lbaxter1@uwyo.edu
Art Museum	John Stark	(307) 766-3930	jdstark@uwyo.edu
Arts and Sciences	Jane Barghothi	(307) 766-1803	jbarghot@uwyo.edu
Athletics	John Stark	(307) 766-3930	jdstark@uwyo.edu
Business	Kent Noble	(307) 760-7860	knoble@uwyo.edu
Education	Stephanie Anesi	(307) 766-1800	sanesi@uwyo.edu
Engineering & Applied Science.....	Laura Baxter	(307) 766-1802	lbaxter1@uwyo.edu
Environment & Natural Resources..	Chris Spooner	(307) 766-5087	cspooner@uwyo.edu
Health Sciences	Jane Barghothi	(307) 766-1803	jbarghot@uwyo.edu
Law	Tracy Richardson	(307) 766-3934	trichar6@uwyo.edu
Outreach School	Toby Marlatt	(307) 766-5085	tmarlatt@uwyo.edu
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Maj. Gen. Pamerleau

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She sat down with the ROTC detachment commander and the UW Foundation director of planned giving, and they talked through what she wanted to do.

“They were able to craft a document that reflected what my priorities were and what I wanted to be able to do and what was appropriate for the university and for ROTC,” she says. “It’s really easy. It’s a matter of going through the process, figuring out what you want to do, and then professionals helping to make that happen.”

Gen. Pamerleau’s connection to Wyoming began in 1966 when her father, a minister, moved to Casper while she and her brother were attending the now-defunct Phillips University in Oklahoma. When her brother transferred to the UW Department of History, Gen. Pamerleau decided to attend UW for her senior year.

In 1967, Public Law 90-130 changed the nature of the armed forces by allowing more women to join. Prior to that, U.S. law had limited the number of women in the military to two percent and the highest rank for a woman to that of lieutenant colonel. Consequently, they began actively recruiting women.

“The opportunities for women were very limited when I went in, but I didn’t have a clue about that kind of thing,” says Gen. Pamerleau. “Most often social change takes place in the military before it takes place across the broad spectrum of society, and there were a lot of opportunities that started opening up.”

In November 1967, a recruiter stopped by a UW lunch room to talk about opportunities in the Air Force, and Gen. Pamerleau decided to join.

“I don’t think I would’ve ever gone into the Air Force had I not been at the University of Wyoming,” says Gen. Pamerleau. “My life would’ve taken a very different direction had I not come here.”

She then spent the next 32 years in the Air Force.

While serving at NATO headquarters in Belgium, she and a young intern were sitting at a sidewalk café. “The next honest person who walks by, we’ll ask him to take a picture,” she said to the intern. That next person was wearing a Wyoming sweater and turned out to be David Nicholas, a lawyer from Laramie who served as Department of Defense’s Advisor to the U.S. Mission to NATO.

“So, for the next 3 1/2 years,” Gen Pamerleau says, “we worked in different parts of NATO but we saw each other often, and we jokingly referred to ourselves as 67 percent of the Wyoming contingent in NATO.”

Although Gen. Pamerleau only spent a brief time in Wyoming, her connection is strong. “It’s sort of funny how I have adopted Wyoming,” she says. “But I think the university provided me a great education. I think it’s continuing to provide even a better education. What a great place.”



Ask Tracy



Ask Tracy is a feature in which people ask questions about annuities, charitable remainder trusts, bequests, and other planned giving opportunities.

Q. *How do I satisfy my charitable goals while still providing for my family?*

A. There are many creative ways to fulfill your charitable planning goals and to take care of your heirs and beneficiaries at the same time, all with tax benefits. For example, you could establish a charitable remainder trust during life or in a testamentary document that provides income for your spouse and children, with the remaining assets passing to the UW Foundation upon expiration of the trust. Creating a charitable remainder trust provides significant tax benefits, including possible income or estate tax deductions. Another creative solution is through a family charitable lead trust. With a family charitable lead trust, you satisfy your charitable giving goals up front with annual annuity or unitrust payments to UW to fund the program of your choice. The assets remaining in the trust upon the expiration of the charitable lead term pass to your children or grandchildren. If structured properly, the gift to your heirs can be estate and gift tax-free. Finally, most estate and charitable plans can be enhanced with a properly structured life insurance component. Assuming health and insurability are not an issue, life insurance is a great way to provide additional dollars either to your family or to UW. The exact structure of the life insurance vehicle is based upon your particular goals and the assets in your estate.

For More Information Contact:

Tracy Richardson, Director of Planned Giving
University of Wyoming Foundation
(307) 766-3934 or trichar6@uwyo.edu
<http://uwyo.giftlegacy.com>



COWBOY LEGACY

The University of Wyoming is listed 17th among “America’s Best Public Colleges” in rankings released this month by Forbes.com. Additionally, Forbes ranked UW fifth among its “America’s Best College Buys.”

Ways to Give

Consider the following planned giving tools

There are many ways to give, and all types of charitable giving may not suit all people. The best way to approach planned giving is to begin with an in-depth analysis of your financial, estate, and charitable planning goals, needs, and desires. This process should involve your legal and financial advisors so that you maximize your personal objectives as tax efficiently as possible. Here at the UW Foundation, we have a number of tools available for different situations. These tools are based on what type of asset is given and how you would like it to be given. The following is a brief summary of the most commonly used planned giving tools and gift arrangements.

CASH – Cash is the simplest and most popular form of charitable gift. Cash gifts are deductible up to 50 percent of your adjusted gross income and can be carried forward for an additional five years for tax deduction limitation purposes. Donors often decide to make a cash gift even after conducting extensive planning and financial analysis simply because it makes the most sense and allows the donor to achieve his or her charitable planning goals.

SECURITIES – If you own stocks, mutual funds, or other securities that have increased in value, you may be able to satisfy your charitable giving goals while realizing considerable tax savings. By gifting long-term securities (those owned for more than one year) to the University of Wyoming, you are entitled to an income tax charitable deduction for the full value of the security, not just original cost. Gifts of appreciated property are deductible up to 30 percent of your adjusted gross income.

REAL ESTATE – If you have a home or other real estate that you no longer want to live in or manage, it

may make sense to incorporate that property into your charitable planning. Gifting real property to the University of Wyoming may help you with capital gains issues, and in some instances you may continue to occupy the property for the balance of your life. It may also allow you to convert a low-yield parcel of real property into an income-producing asset.

CHARITABLE BEQUESTS –

A charitable bequest is a gift to the University of Wyoming through your will or revocable living trust. Bequests can enable donors to make more significant gifts than they would have been able to during their lifetimes. These gifts are critical to the future success of UW because of the students, faculty, and programs that they support

RETIREMENT PLANS – Donors benefit from leaving their retirement plans to UW because of the tax inefficiencies of passing them on to their families. And it’s easy—donors can designate their retirement plan assets to the UW Foundation by completing a change of beneficiary form that they obtain from their plan custodians. In addition to these deferred retirement plan gifts, the charitable IRA rollover provisions enacted by Congress several years ago have enabled current giving opportunities that are tax efficient. The IRA rollover is currently only available through 2009.

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Recent UW Successes and Highlights

- The Mountain West Conference honored 52 student-athletes from the University of Wyoming with its most prestigious academic honor, the league's Scholar Athlete Award. Of those 52 awards, five were for a perfect 4.0 grade point average and 15 were for a 3.90 or above.
- Ten University of Wyoming students were among a group of more than 100 to participate in the recent successful launch of a NASA two-stage Terrier-Orion rocket launched from NASA's Wallops Flight Facility in Virginia.
- Schlumberger, the world's leading oilfield services company, gifted \$73 million in state-of-the-art oil exploration and production modeling software to the University of Wyoming.
- Researchers from UW, in collaboration with a German university, have identified how sunlight changes the activity of a particular class of proteins called BLUF domain photoreceptors, which has implications for bacterial resistance. The research has been published in an article in *Nature*, a premier international science and technology journal.
- An incoming freshman class with national credentials has earned the University of Wyoming Cowboy wrestling program three additional top-20 rankings from media organizations close to the sport.
- The Arch Coal Foundation gave \$1.5 million to the University of Wyoming's School of Energy Resources (SER) Clean Coal Technology Center.
- During the 2009–10 school year, three national award-winning writers will teach UW students. These include poet Claudia Rankine, nonfiction writer and *Paris Review* editor Philip Gourevitch, and Pulitzer-prize-winning novelist Edward P. Jones.
- Jeffrey Means, an assistant professor in the University of Wyoming Department of History, was recently awarded a Newberry Consortium in American Indian Studies Faculty Fellowship. The one-semester fellowship, with an endowment of \$25,200, will allow Means to conduct research at the Newberry Library, one of the nation's most prestigious privately funded research institutes.
- The University of Wyoming Art Museum has been selected to receive a gift of 50 works of art from New York collectors Dorothy and Herbert Vogel. "The Dorothy and Herbert Vogel Collection: Fifty Works for Fifty States" will distribute 2,500 works from the Vogel's collection of contemporary art throughout the nation, with 50 works going to a selected art institution in each of the 50 states.
- Wyoming Public Radio news personnel won a station record of four awards from the Public Radio News Directors Association, which honor the nation's best public radio news reporting.
- With the help of goat tiers Sarah Mulholland and Nikki Steffes, the UW Women's Rodeo Team took first at the 2009 College National Finals Rodeo for the second time in three seasons.
- Eusebius Mukhwana, a doctoral student in the UW Department of Agriculture, has received a prestigious Norman Borlaug award for leadership in agriculture. In 1997, he helped found and direct the Sustainable Agriculture Centre for Research and Development in Africa (SACRED Africa), before coming to UW to study.
- The William T. Schwartz Professor of Law was established by the Schwartz's family—Mary Anne and the late Ron Barnes, Susan and Jim Higgins, Sally and Jim Belcher, and Bill and Cheryl Schwartz—in memory of their father, prominent Casper attorney William T. Schwartz. It was endowed with \$250,000, which was matched to \$500,000 by the State of Wyoming.

CHARITABLE YEAR-END GIVING

As we anticipate the close of 2009, it is time to think about ways to fulfill your charitable goals, as well as reducing your taxes. Here are just a few:

- A deductible gift of cash
- A deductible gift of property that avoids capital gains
- A deductible gift annuity or unitrust that gives you income for life.

For more information, contact Tracy R. Richardson, Director of Planned Giving, at 307-766-3934 or e-mail, trichar6@uwyo.edu

Please consult your attorney or tax advisor before making any decision related to charitable year-end giving.



COWBOY LEGACY

Ways to Give

Continued from page 6

LIFE INSURANCE – Life insurance may be used creatively to fulfill your charitable planning goals. You can simply gift an existing policy to the University of Wyoming, you can name UW as the beneficiary of that policy, or you can name the UW Foundation as the owner and beneficiary of a newly issued policy. Annual gifts to the UW Foundation that fund life insurance premium payments are tax deductible and are a great way to maximize your charitable giving and your impact on the future of UW.

CHARITABLE GIFT ANNUITIES

– With a charitable gift annuity, you gift cash, securities, or real estate to the University of Wyoming Foundation in exchange for fixed annuity payments for the rest of your life. The annuity rate is based upon your age, your payments are guaranteed, and you are

entitled to a charitable deduction for the present value of the gift portion of the annuity. A charitable gift annuity is a great way to secure fixed income in retirement while also significantly impacting the future of UW.

CHARITABLE REMAINDER TRUSTS

– A charitable remainder trust can be established with a gift of stock, real estate, or cash. Low-yielding appreciated assets are best. The assets are then sold inside the trust, and the proceeds are typically invested in a diversified portfolio. You receive income for life, as well as significant tax advantages. After your lifetime or a term of up to 20 years, the remaining trust assets go to the UW Foundation for the benefit of the specific college or program that you designate. If the remainder interest is irrevocable, the UW Foundation can serve as trustee. Overall, the charitable remainder trust is one of the most flexible and effective charitable and retirement planning tools available.

ABOUT US

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. 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 to express our sincerest thanks.

University of Wyoming Foundation

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