

GUIDE TO PHILANTHROPIC INVESTMENT



LEAD ON.®

TCU

Philanthropic Investment Opportunities

Endowment gifts continue to grow and provide financial support for future generations.

ENDOWMENT GIFTS

Texas Christian University's strong financial foundation supports the university's remarkable momentum. Forbes recently recognized TCU by ranking it among the top private universities in the nation for financial health and awarding the university a coveted A+ rating. The Princeton Review further affirmed TCU's operational excellence, ranking the university No. 11 in the nation for best-run colleges. Together, these recognitions underscore TCU's strong stewardship, stability as a trusted institution and commitment to delivering on its academic mission.

TCU's endowment bolsters the university's success. The endowment supports financial aid and scholarships for students, endowed chairs and professorships for faculty, as well as academic and athletic programs across campus.

A gift to the endowment not only benefits the university in the academic year the gift is received but also provides continuous support into the future. A one-time gift, wisely invested, is magnified beyond its initial amount, permanently impacting TCU's people and programs.

Every decision at TCU starts with students. Whether shaping spaces, recruiting top faculty or awarding scholarships, a robust endowment creates financial security and resilience, keeping the focus on what's best for Horned Frogs. As more students select TCU as their university home, generosity empowers us to expand need-based support and offer exceptional learning experiences. Strengthening the endowment accelerates leadership development, real-world learning and cross-disciplinary collaboration. Support for TCU's endowment helps cultivate responsible citizens who impact their communities, innovate fearlessly and leave a positive, lasting imprint on the lives they touch. With every investment, the university's supporters empower TCU to innovate and lead through advancements in teaching, scholarship and service to society.

STUDENT SUPPORT

Each year, as the number of aspiring Horned Frogs continues to climb, the financial need among students grows. Endowed scholarships make the TCU experience more accessible and affordable for bright, engaged learners who bring energy and curiosity to campus. Scholarships allow deserving students to fully engage in their courses as well as pursue research and leadership opportunities — without the stress of growing debt. Supporters turn potential into

achievement and help shape confident, compassionate leaders who make a difference.

TCU Scholarship Initiative

Financial resources should not be a barrier to a TCU education. Over the past decade, we've increased TCU's financial aid substantially — \$150 million — and thousands of students are benefitting, but there's more work to be done. We are doubling down on our commitment to students with a goal to raise \$300 million for scholarships. Guided by our strategic plan, LEAD ON: Values in Action™, the TCU Scholarship Initiative helps ensure that admission criteria, not ability to pay, decides who becomes a Horned Frog. Find out how to change a life by visiting:

tcu.edu/scholarship-initiative.

TCU for Texans

The TCU for Texans initiative is designed to expand access to TCU's nationally ranked academic programs, personalized learning environment and vibrant campus life, regardless of a student's financial status. In addition to tuition, housing and meal plan assistance, TCU for Texans offers renewable support for qualifying students throughout their college journey, with eligibility reassessed annually based on need.

Named Endowed Undergraduate Scholarships and Graduate Assistantships

Gift Level: \$100,000 – \$1 Million or More

Donors who endow scholarships with gifts ranging from \$100,000 to \$1 million or more may name the scholarship. At certain levels, they also may choose to support the budget of the school, college, department or institute of their choice, providing funds to recruit talented applicants and reward outstanding current students, or to strengthen the university's general scholarship fund.

Additional benefits accrue according to the gift level. A \$1.33 million gift provides the equivalent of a full-tuition award. At this level, donors may determine criteria upon which a specific student will be selected. A \$250,000 gift provides the equivalent of the annual loan burden for a student who borrows. At this level, donors may determine criteria upon which a specific student will be selected. A \$100,000 gift provides the equivalent of the gap between need and the average award to a student. At this level, donors may determine general criteria upon which a specific student will be matched.

Philanthropic Investment Opportunities

Graduate Assistantships

Minimum Gift: \$250,000

Graduate assistantships provide tuition assistance and stipends and may support research or teaching responsibilities or other work within an academic department.

Annual Named Scholarships

Minimum Gift: \$100,000

A donor may make a commitment of \$100,000 over four years to name an annual scholarship.

Annually Expendable Scholarships

Minimum Gift: \$2,500

FACULTY SUPPORT

Endowed chairs and professorships draw exceptional scholars who elevate teaching, research and discovery. Endowing a position strengthens learning beyond lectures and labs. Endowed faculty make engaging in research, creative practice and meaningful service opportunities possible for every student. Generous support boosts TCU's reputation and reach, helping us recruit the best minds and broaden opportunities across campus.

The minimum gift amount for an endowed position varies based upon the needs of the specific role.

Distinguished University Chairs

Qualifying gifts begin at \$5 million.

An endowment for a Distinguished University Chair underwrites salary and other teaching and research support at a level designed to attract and retain an eminent scholar to the university. The amount may vary by academic discipline.

Endowed Chairs

Qualifying gifts begin at \$2.5 million.

Endowed chairs underwrite salary, teaching and research support for faculty positions. Such endowments enable the university to attract new scholars or retain senior, distinguished faculty. The amount may vary by academic discipline.

Endowed Professorships

Qualifying gifts begin at \$1 million.

Endowed professorships underwrite salary and other related costs for tenured faculty who exhibit special academic promise. Professorships may be offered to attract faculty members who are rising stars in their fields, or to recognize academic achievement by current faculty.

Faculty Fellowships

Qualifying gifts begin at \$500,000.

Faculty fellowship endowments may be established to bring visiting faculty or other professionals to campus, or to support current TCU faculty. Visiting professorships, professionals-in-residence endowments and TCU faculty fellowships fall into this category.

■ **Visiting Professorships** provide support for travel costs, salary and living expenses for faculty visiting the TCU campus for periods up to one academic year. Visiting professorships enable the university to bring outstanding scholars from a wide variety of disciplines to the TCU campus. These distinguished academics broaden the range of academic offerings to students and provide opportunities to both students and faculty to exchange ideas with leading scholars from around the globe.

■ **Professionals-in-Residence** endowments provide support for travel costs, salary and living expenses for visiting professionals from a wide range of disciplines in the arts. By bringing these talented performers and teachers to campus, TCU students have opportunities to study with outstanding professionals from the international arts community.

■ **TCU Faculty Fellowships** may provide salary enhancements, research funding or support for professional travel for current TCU faculty.



Philanthropic Investment Opportunities

Faculty Creativity/Development Funds

Minimum Gift: \$100,000

Endowed funds may be established to address specific needs identified by deans, department chairs or individual faculty. Funds may be used to supplement faculty salaries, to provide funding and equipment for faculty or student research, or to cover travel expenses for faculty conducting research or attending professional conferences.

ACADEMIC AND ATHLETIC PROGRAM SUPPORT

Endowments for schools, colleges, departments, programs and athletics open doors for students. They connect students with mentors and campus partners who offer unique experiences, both here and abroad. Innovative programs spark curiosity, sharpen thinking and translate ideas into real-world impact, all made possible by endowed funds.

School, college and department endowments provide resources that will accelerate programmatic improvements in teaching, research and creative activity and elevate the school, college or department to a level of national prominence. Such gifts, which begin at \$50,000, depending on the needs of the program and college supported, may provide income to retain and recruit world-class faculty, expand research opportunities, enhance scholarship support, implement innovative programs or underwrite capital improvements. Nonendowed academic program support is encouraged at all levels.

TCU's centers and institutes bring together some of the university's most distinctive programs to address societal needs and provide services and educational programs to both students and the greater community. These are interdisciplinary programs that combine the resources of multiple departments to develop innovative teaching and research, unique co-curricular experiences for students and educational programs of interest to the public.

Gifts that provide significant support for academic programs are recognized with special naming opportunities commensurate with the amount and opportunity.

Endowed funds dedicated to student-athlete development make a powerful impact, advancing the holistic growth of Horned Frog student-athletes. These investments continue to shape confident, capable leaders prepared for life no matter what profession they pursue.

FACILITIES SUPPORT

TCU offers numerous opportunities at various levels for facilities support. Many gifts for facilities are recognized with special naming opportunities.

The total project cost of a new building at TCU typically includes an architectural and engineering study, site preparation, construction, equipment and furnishings. Normally, a new, existing or renovated facility is named by a donor who provides one-third to one-half of the project cost. New construction often creates numerous additional opportunities for support and recognition.

Naming opportunities are currently available in existing buildings or may become available through renovation or expansion. Individual naming opportunities range from faculty offices to an entire facility. Other facilities not undergoing renovation may be named in recognition of gifts that provide significant support for programs housed in the facility. Names are maintained through the lifetime of the space or facility.

LOYALTY GIVING

The Office of Loyalty Giving builds a culture of faithful support with alumni, parents, faculty, staff, friends and students. We demonstrate and create awareness of the impact of philanthropic gifts on the university and provide constituents a variety of opportunities to support and engage in the life of TCU. Your investment means the university can make a difference in the global community today and ensures it will continue to improve for future generations to come. Donors also have the option of creating a Charitable Gift Annuity with an IRA.

Annual support from loyal donors — no matter the amount — underwrites every element of the TCU experience, from strengthening academic and athletic programs and building scholarships to supporting faculty and staff. Your participation counts, not just in dollars, but also as a vote of confidence in the university.

To make a gift online, please visit makeagift.tcu.edu. For more information about how annual support benefits TCU, please visit advancement.tcu.edu.

In making a gift to TCU, you join a diverse community of individuals who have left their mark on the university. As you consider a gift, you should think about your family's needs, your lifestyle and your financial resources, along with your love for TCU and your desire to make a difference in the lives of Horned Frog students.

Ways To Give

There are many ways you can support TCU as part of your overall financial and estate plans, often resulting in significant tax and financial benefits. Options may include outright gifts of cash, cryptocurrency, appreciated assets, such as securities and real estate, or gifts of tangible personal property. In addition, there are several deferred gift vehicles such as charitable gift annuities and charitable remainder trusts.

OUTRIGHT GIFTS

Gifts of Cash

A cash contribution can be an effective way to accomplish your goal. It is one of the easiest ways to make a gift. A cash gift can have an immediate impact on TCU. Simply go to makeagift.tcu.edu or mail a check, made payable to TCU, to the Office of University Advancement, TCU Box 297044, Fort Worth, Texas 76129.

Cryptocurrency

Digital currency like Bitcoin is one of the best-performing assets over the past five to 10 years. Many investors have a very low-cost basis and should evaluate the tax implications before cashing in. One impactful option that can save on taxes: using cryptocurrency to support our mission. Make a gift of cryptocurrency by visiting our website here:

[Donate Crypto Here.](#)

IRA Qualified Charitable Distribution

If you are 70.5 years old or older, you can use your individual retirement account (IRA) to make a tax-smart gift to TCU. You may give any amount up to \$111,000 per year from your IRA directly to TCU without having to pay income taxes on the distribution. Moreover, at 73, your IRA charitable distribution gift can be used to satisfy all or part of your required minimum distribution.

Gifts of Appreciated Securities

Appreciated securities include publicly traded or closely held stock, bonds and mutual funds. When you make a gift of appreciated securities owned more than one year to TCU, you will realize a charitable income tax deduction for the fair market value and avoid capital gains tax. Electronic delivery of the securities is available.

Donor Advised Funds

A donor advised fund may be used to make grants to TCU. Donors can recommend a one-time grant for immediate impact and/or schedule recurring grants for future charitable gifts. Donors also can create a legacy by naming

TCU as the beneficiary of the entire account or a percentage. By using a percentage, you can create a family legacy of philanthropy by naming your loved ones as your successor to continue recommending grants. Contact your fund administrator for a beneficiary form.

Gifts of Real Estate

A gift of real estate can be used to accomplish your gift-giving goals, and the outright transfer of residential, commercial and agricultural properties to TCU may fit within your overall financial plan. Such gifts may provide income and/or estate tax benefits, the opportunity to escape the burden of managing or selling the property, and/or avoidance of capital gains tax if the asset has been held more than one year. The university's ability to accept gifts of this nature is limited by our ability to use the gift in support of our mission. In some cases, TCU will ask you for approval to liquidate the asset so the proceeds can be used to accomplish your goal for the university.

Gifts of Personal Property

Gifts of personal property may include items such as works of art, rare books or a collection of items. The university's ability to accept gifts of this nature is limited by our ability to use the gift in support of our mission. In some cases, TCU will ask you for approval to liquidate the asset so the proceeds can be used to accomplish your goal for the university.

Gifts of Mineral Assets

TCU accepts gifts of mineral assets, including mineral interests, royalty interests and working interests. Such gifts enable you to support TCU's mission and may provide income and/or estate tax benefits.



Ways To Give

DEFERRED GIFTS

Deferred gifts are gifts that will benefit TCU in the future and in many cases enable the donor to make a larger contribution. There are many ways to make a deferred gift. The staff in TCU's Office of Gift Planning stand ready to help you and your advisors make the most informed decision possible. Please contact the Office of Gift Planning at 817-257-7299 or giftplanning@tcu.edu, or visit our website at giftplanning.tcu.edu.

A Gift in Your Will

A gift in your will or trust (also known as a bequest) of any size allows you to benefit TCU upon your death without diminishing your assets during your lifetime. Your bequest can specify how your gift to TCU is to be used.

Bequests can take many forms, including a specific amount, a specific asset, a percentage of your estate and the remainder of your estate. Please visit our website at plannedgiving.tcu.edu for sample language.

Charitable Gift Annuities

A charitable gift annuity (CGA) is a simple way to make a gift to TCU and receive an income stream for life. Upon a gift of cash, securities or — in some circumstances — real estate, the donor and TCU enter into a simple contract that guarantees the payment of a fixed amount for the lifetime of the donor and/or one other person. Upon the death of the annuitant(s), the balance passes to TCU to be used as you directed. The minimum amount for a charitable gift annuity is \$25,000.

Donors also have the option of creating a charitable gift annuity with an IRA. You can make a one-time election of up to \$55,000 to fund a CGA.

Retirement Plan Gifts

Qualified retirement vehicles can also provide a way to make a gift by naming TCU as one of the beneficiaries of the retirement plan. Naming TCU as a beneficiary can result in significant tax savings to your estate and heirs. Remember: a careful review of all your assets should be made to determine if this is the best choice to benefit your family and TCU.

Life Insurance

A gift of life insurance can be a way to contribute to TCU with little out-of-pocket expense. In many cases, life insurance is obtained to secure an inheritance for your heirs while you are building your estate. Upon review, you may find that your estate has grown sufficiently large that life insurance is no longer needed. By making TCU a beneficiary and/or the owner of the policy, you could make a substantial gift to the university while still providing for your heirs.

Charitable Trusts

A trust is a very flexible way to make a gift to TCU. It can provide an income stream to one or more individuals or to TCU, it can last for a lifetime or a specific time period, and it can contain provisions for the way the gift is to be used by TCU. This type of gift can be established with a variety of assets and can provide fixed or variable income for life or a term of years. Examples include charitable remainder trusts and charitable lead trusts.

Retained Life Estates

A gift of a life estate or a remainder interest in a home or farm is a legal agreement under which you give the remainder interest in your home or farm to TCU. You retain the full use of the property and all responsibility for the expenses of maintaining the property during your lifetime. Upon your death, the property will pass to TCU..



Donor Recognition

ADDISON & RANDOLPH CLARK SOCIETY

Named after TCU's founders, Addison and Randolph Clark, the Addison & Randolph Clark Society was founded in 1977 to recognize the generosity of TCU's leadership level donors. Investments made by Clark Society members are the foundation of TCU's tradition of excellence.

Donors become members of the Clark Society by making annual or lifetime leadership gifts that may be designated to any area of the university (including athletics). Gifts are counted during TCU's fiscal year, June 1-May 31.

For more information about benefits and membership in the Clark Society, please contact the Office of Donor Relations at 817-257-7806 or visit advancement.tcu.edu.

Lifetime Gift Recognition Levels

Visionary

Gifts of \$25 Million or Greater

Pillar

Gifts of \$10 Million – \$24,999,999

Founder

Gifts of \$1 Million – \$9,999,999

Benefactor

Gifts of \$500,000 – \$999,999

Sustainer

Gifts of \$250,000 – \$499,999

Centurion

Gifts of \$100,000 – \$249,999

Patron

Gifts of \$50,000 – \$99,999

Annual Gift Recognition Levels

Chancellor's Council

Gifts of \$10,000

Member

Gifts of \$1,000 – \$2,499

Junior Clark Annual Recognition Levels

Years 0-3 after Graduation

Gifts of \$100 or Greater

Years 4-6 after Graduation

Gifts of \$300 or Greater

Years 7-9 after Graduation

Gifts of \$500 or Greater

FROG CLUB

The Frog Club strives to provide a world-class student-athlete experience through investments in scholarships, programs, resources and facilities resulting in championship-level success. Whether a Frog Club investment is made through purchasing season tickets, making an annual contribution, giving specifically to a sports program or making a major gift to an endowed scholarship, program or capital project, each gift directly impacts TCU student-athletes during their time at TCU and beyond.

LOYAL PURPLE

Loyal Purple is a group of dedicated TCU supporters who consistently impact the university year after year. It celebrates thousands of alumni and friends who make a gift of any amount, anywhere within the university, each fiscal year.

B.M. & FRANCES BRITAIN SOCIETY

We appreciate the opportunity to thank donors of future gifts, and membership in the Britain Society is one way we do that. By letting TCU know of your gift intention during your lifetime, you ensure that the gift will be used as you intend. In addition, your generosity can inspire other donors to make a similar type of gift.

The Office of Gift Planning is available to discuss any type of future gift with you and your advisor. TCU's Gift Planning team can be reached at 817-257-7299 or 877-TCU-FROG and giftplanning@tcu.edu or plannedgiving.tcu.edu.

UNIVERSITY ADVANCEMENT

Texas Christian University

University Advancement

TCU Box 297044

Fort Worth, TX 76129

www.advancement.tcu.edu

University Advancement professionals are available to discuss your interests and work with you and your advisers to consider a gift most beneficial to you and TCU.

