



**TCU**

**GUIDE TO PHILANTHROPIC INVESTMENTS**





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BUILDING UPON REMARKABLE **SUCCESS**,  
TCU HAS CHARTED ANOTHER AMBITIOUS COURSE:  
TO CREATE THE ACADEMY OF **TOMORROW**,  
A TRULY **GREAT NATIONAL UNIVERSITY**.

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- CHANCELLOR VICTOR J. BOSCHINI, JR.

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## THE ACADEMY OF TOMORROW



TCU imagined the future. More than 39,800 donors to *The Campaign for TCU* made it come true. Building upon remarkable success, TCU has charted another ambitious course: to create the Academy of Tomorrow, a truly great national university.

The University's highest priority is keeping an exceptional TCU education accessible to the most qualified and capable students. Mary Couts Burnett, one of the most significant figures in TCU history, described the University as: "a nonsectarian institution open to all alike, to those of any faith or creed, and alike to rich and poor." Philanthropic support will keep TCU "open to all alike" among deserving students.

A key element in TCU's quest to become a truly great national university is to add new faculty positions. Such positions attract distinguished teacher-scholars who bring significant recognition to the University, boost TCU's research capabilities and help launch new initiatives. Most importantly, endowed positions enable TCU to put students – including undergraduates – in classrooms and laboratories with top professors.

To further build quality and reputation, TCU must strengthen academic programs and initiatives. Among these are Harris College of Nursing & Health Sciences, the Neeley School of Business, Mary Couts Burnett Library, the TCU Energy Institute and the John V. Roach Honors College.

Creating an optimal campus environment is another central element in TCU's strategy for the future. Philanthropic support is sought for several key projects, including a state-of-the-art facility for the Neeley School of Business, a comprehensive new facility for the School of Music, extensive renovation of Daniel-Meyer Coliseum and upgrades to the Charlie and Marie Lupton Baseball Stadium.

We greatly appreciate your interest in helping us realize our ambitious vision. This guide outlines the various ways in which you can make a philanthropic investment that would be meaningful to you. Thank you for your support!

A handwritten signature in black ink, appearing to read "V. Boschini".

- Chancellor Victor J. Boschini, Jr.



## INVESTMENT OPPORTUNITIES

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

### ENDOWMENT GIFTS

Endowment gifts are among the most enduring means of support for TCU and provide many opportunities to merge our donors' interests with the needs of the University. Endowed funds are created by donors wishing to establish permanent support for scholarships, faculty, other University programs or its greatest need.

When assets are donated to an endowed fund, the gifts "buy shares" in TCU's endowed investment pool, which operates in a manner similar to a mutual fund. The pooled assets of TCU's endowment are invested in perpetuity with the goal of spending approximately 5 percent of an average market value over the long term. The remaining earned income is added back to the principal so that it continues to grow and provide financial support for future generations. Endowed funds are named and used according to the donor's wishes and the annual spendable income from an endowed fund can only be expended for the fund's specified purpose.

Minimum support levels have been established for different types of endowed funds to ensure that the income will be sufficient to achieve the donor's goals and the University's priorities. The amount required to establish an endowed fund at TCU varies depending on the fund's purpose.

### STUDENT SUPPORT

Endowed scholarships ensure that the most talented and deserving students can benefit from an exceptional TCU education, regardless of financial need. Consequently, increasing scholarship support is the University's top priority. Donors may endow several types of undergraduate and graduate scholarships and fellowships. Every scholarship gift is a direct investment in students.

#### **Chancellor's Scholars / Name a Chancellor's Scholarship: \$1 million or more**

Undergraduate students eligible for Chancellor's Scholarships are rewarded for their exceptional academic achievement with a full-tuition scholarship for four years. In addition, they benefit from a rich program that further enhances their TCU experience. This gift provides the equivalent of a full-tuition award.

#### **Community Scholars / Name a Community Scholar Award: \$1 million or more**

Undergraduate students eligible for the Community Scholars Program are recruited from economically disadvantaged Metroplex high schools. Community Scholars receive a scholarship to cover tuition, room, books and board. This gift provides the equivalent of a full-tuition award.

## **Named endowed scholarships / Gift level: \$50,000-\$1 million or more**

Donors who endow scholarships with gifts ranging from \$50,000 to \$1 million or more may name the scholarship. 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 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 and enjoy a private lunch or reception with the recipient. A \$250,000 gift provides the equivalent of the annual loan burden for a student. 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.

## **Graduate Fellowships / Minimum gift: \$500,000**

Graduate fellowships provide tuition support for study at the graduate level as well as a stipend.

## **Graduate Assistantships / Minimum gift: \$250,000**

Graduate assistantships provide tuition assistance and stipends, but also involve 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 / Any amount**

## **FACULTY SUPPORT**

Endowed chairs and professorships are important resources in attracting and retaining talented faculty who are committed to the teacher-scholar model. They provide financial support through salary enhancements and related teaching and research resources, as well as visibility and prestige for the holders of these positions and for the University.

## **Distinguished University Chairs / Minimum gift: \$5 million**

An endowment for a Distinguished University Chair provides sufficient annual income to provide full salary and other teaching and research costs at a level designed to attract an eminent scholar to the University. Distinguished University Chairs typically underwrite new positions.

## **Endowed Chairs / Minimum gift: \$2.5 million**

Endowed chairs provide salary, teaching and research support for new or current faculty positions. Such endowments enable the University to attract new scholars or retain senior, distinguished faculty.

## **Endowed Professorships / Minimum gift: \$1 million**

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

## **Faculty Fellowships / Minimum gift: \$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, artist-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.

- Artist-in-Residence endowments provide support for travel costs, salary and living expenses for visiting artists 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.

## **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 PROGRAM SUPPORT**

Donors may wish to make a gift to benefit the University's academic programs by establishing endowments that will provide ongoing support of schools and colleges, departments, or centers and institutes.

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 may provide income to retain and recruit world-class faculty, expand research opportunities, enhance scholarship support, implement innovative programs or underwrite capital improvements.

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 such as those listed below.

### **School or College / By Consultation Department / By Consultation Institutes and Centers / By Consultation**

## **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, and a maintenance endowment. Normally, a new 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. As with new construction, existing buildings to be renovated are normally named by a donor who provides at least one-third to one-half of the cost of renovation. Other facilities not undergoing renovation may be named in recognition of gifts that provide significant support for programs housed in the facility.

## **ANNUAL FUND**

Annual unrestricted gifts provide valuable support that directly benefits every student and faculty member at TCU. Annual gifts can be used by the University immediately to underwrite scholarships, research, classroom and laboratory improvements, and athletic programs. Annual gifts also enable the University to undertake innovative new programs or address unforeseen needs.

To learn more about how annual gifts benefit TCU, or to make a gift online, please visit the TCU Annual Fund website at [www.annualfund.ecu.edu](http://www.annualfund.ecu.edu).



## WAYS TO GIVE

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 take into account 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.

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, appreciated assets, such as securities and real estate, or gifts of tangible personal property. In addition, there are a number of deferred gift methods 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.

#### Gifts of Appreciated Securities

Appreciated securities include publicly traded or closely held stock and taxable or tax-exempt bonds. 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.

#### 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 the donor for approval to liquidate the asset so the proceeds can be used to accomplish the donor's 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.





## 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.

### Bequests

A bequest of any size in your will or trust 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.

### Charitable Gift Annuities

A charitable gift annuity is a simple way to make a gift to TCU and receive an income stream. 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 \$10,000.

### 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 a charity as a beneficiary can result in significant tax savings to your estate and heirs. When deciding whether to use this type of asset to make a gift, a careful review of all your assets should be made to determine if this is the best choice to benefit your charitable interests.

### Life Insurance

A gift of life insurance can be a way to make a contribution to TCU with no out-of-pocket expense to the donor. 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 period of time, 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. 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 donate 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

The Clark Society is named for TCU's founders, Addison and Randolph Clark. The brothers devoted their lives and resources to realizing their dream of establishing a liberal arts college on the Texas frontier. Today's leadership donors ensure the continuation of that dream by supporting the University with annual gifts of \$1,000 or more. You may designate your gift to the Annual Fund, for a specific purpose or project, or for Horned Frog athletics. Donors who have given a lifetime total of \$50,000 or more to TCU are given permanent membership in the Clark Society.

### Annual Gift Recognition Levels

Chancellor's Council	Gifts of \$10,000 or greater
Dean's Council	Gifts of \$5,000-\$9,999
Director	Gifts of \$2,500-\$4,999
Member	Gifts of \$1,000-\$2,499

### 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-\$499,000
Centurion	Gifts of \$100,000-\$249,000
Patron	Gifts of \$50,000-\$99,999



## B.M. & FRANCES BRITAIN SOCIETY

Through membership in the B.M. & Frances Britain Society, TCU recognizes individuals who have provided for TCU in their estate plans. The society is named for B.M. Britain, a member of the class of 1924, and his wife, Frances. The couple supported the University throughout their lifetimes and their combined estate gifts represent the largest bequest in TCU's history. In addition, the Britains benefited the University by establishing seven charitable trusts.

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/or your advisor. TCU's Gift Planning team can be reached at 817-257-7299 or 877-TCU-GIVE (toll free) and [giftplanning@tcu.edu](mailto:giftplanning@tcu.edu) or [www.giftplanning.tcu.edu](http://www.giftplanning.tcu.edu).

# UNIVERSITY ADVANCEMENT DIRECTORY

Texas Christian University  
Office of University Advancement  
TCU Box 297044  
Fort Worth, TX 76129  
817-257-7800  
877-TCU-GIVE (toll free)  
[www.advancement.tcu.edu](http://www.advancement.tcu.edu)

University development professionals are available to discuss your interests and work with you and your advisors to consider a gift most beneficial to you and TCU. For more information about making a gift to TCU, please contact the appropriate office listed below.

## Schools, Colleges and Other Academic Units

AddRan College of Liberal Arts	817-257-6187	<a href="http://www.addran.tcu.edu">www.addran.tcu.edu</a>
College of Communication	817-257-7275	<a href="http://www.communication.tcu.edu">www.communication.tcu.edu</a>
College of Education	817-257-5562	<a href="http://www.coe.tcu.edu">www.coe.tcu.edu</a>
College of Fine Arts	817-257-5039	<a href="http://www.cfac.tcu.edu">www.cfac.tcu.edu</a>
College of Science & Engineering	817-257-7020	<a href="http://www.cse.tcu.edu">www.cse.tcu.edu</a>
Harris College of Nursing & Health Sciences	817-257-5032	<a href="http://www.harriscollege.tcu.edu">www.harriscollege.tcu.edu</a>
Neeley School of Business	817-257-5149	<a href="http://www.neeley.tcu.edu">www.neeley.tcu.edu</a>
John V. Roach Honors College	817-257-5332	<a href="http://www.honors.tcu.edu">www.honors.tcu.edu</a>
Mary Couts Burnett Library	817-257-5332	<a href="http://www.library.tcu.edu">www.library.tcu.edu</a>
Ranch Management	817-257-5260	<a href="http://www.ranch.tcu.edu">www.ranch.tcu.edu</a>

## Regional Development

Eastern United States and Houston	817-257-7291
Central United States and West Texas	817-257-5079
Metroplex and East Texas	817-257-6368
Western United States and Austin	817-257-6703

Alumni Relations	817-257-7803	<a href="http://www.froglinks.com">www.froglinks.com</a>
Office of Annual Giving	817-257-7800	<a href="http://www.annualfund.tcu.edu">www.annualfund.tcu.edu</a>
Athletics	817-257-7700	<a href="http://www.frogclub.tcu.edu">www.frogclub.tcu.edu</a>
Corporate Relations	817-257-7019	
Foundation Relations	817-257-5047	
Gift Planning	817-257-7299	<a href="http://www.giftplanning.tcu.edu">www.giftplanning.tcu.edu</a>
Parent Giving	817-257-6314	
Vice Chancellor for University Advancement	817-257-7785	
Donor Relations/Stewardship	817-257-7806	<a href="mailto:www.donorrelations@tcu.edu">www.donorrelations@tcu.edu</a>



[www.advancement.tcu.edu](http://www.advancement.tcu.edu)

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