



CLEMSON UNIVERSITY

2023 Impact Report
Office of Gift and Estate Planning





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Dear Friends,

Anna and Thomas Clemson were extraordinary individuals. It was their passion to assist struggling farmers in South Carolina with the implementation of new techniques in agriculture to help them grow and prosper. Instead of resting comfortably in a privileged life, their humility drove them to create an unrestricted legacy that would benefit generations of individuals around the globe.

Individuals and families throughout Clemson's history have helped the University keep pace with technology and the ever-changing needs of our society. We need more partners and investors to help us support and shape our students into critical thinkers, problem solvers and dynamic leaders in all areas of society.

As the need for funding increases due to federal and state budget cuts, so does the University's desire to recruit and retain exceptional students and faculty who will shape our future. Whether it is in areas of architecture, business, engineering, agriculture, biochemistry, nursing, athletics, communication studies or political science, students and faculty require technology, facilities and engagement opportunities to expand their knowledge and facilitate solutions and innovations for the grand challenges ahead.

Our campus is a living example of philanthropy through many gifts like Thomas and Anna Clemson, as well as William and Florence Ballenger for the Clemson National Scholars Program, Joe and Caroline Dixon Fellows Program in the Honors College, Robert H. Brooks Sports Science Institute, Homer Curtis Mickel and Leola Carter Mickel Chair in Architecture, Roy and Margery Pearce Center for Professional Communications and other endowments that have made Clemson a premier university. The Hendrix Student Center, Harris A. Smith Building and Clyde V. Madren Conference Center exist today because of the generosity of those who understood the impact of planned giving opportunities.

We honor those who have taken action to secure Clemson's future by including the University in their estate plans. Thank you for everything you have done and continue to do to enrich and enhance the Clemson Experience for future generations. The endowments you fund, the scholarships and programs you support will impact our state, nation and world.

Please consider starting the important conversation about how you and your family can create a lasting legacy at Clemson. Thomas and Anna Clemson's will was resolute, and we hope you possess the same determination. Regardless of age or economic status, we all have a legacy to leave. Starting the conversation about shaping your legacy today allows you to build on it over time and experience the impact your generosity can achieve during your lifetime. If you have not made the decision to join us in securing Clemson's future, please consider taking this journey to help enhance and expand the vision and reputation of this great University today, tomorrow and forever.

With sincere appreciation, I am,
Gratefully Yours,

JOVANNA J. KING

Senior Associate Vice President for Development



Giving Back to Move Clemson Forward: **THE BROOKS FAMILY IMPACT ON OUR UNIVERSITY**

Robert “Bob” Brooks held a deep affinity for Clemson throughout his lifetime and truly embodied the vision of Thomas Green Clemson — an affinity shared by his sons Mark ’91 and Coby ’92, and his grandson River ’19. Raised on a farm in the small town of Loris, South Carolina, Brooks learned the value of having a strong work ethic. He went on to pursue a degree in dairy science at Clemson and graduated in 1960. After serving in the United States Army, Brooks founded Eastern Foods Inc. in 1966 and invented a formula for the first non-dairy creamer. In 1984, he began an association with the Hooters restaurant chain. His division of Hooters of America Inc. controlled the developmental rights to the concept, and sales quadrupled from 1990 to 1995. He later purchased the trademark from its founders, giving him full control over all business decisions.

Instead of using his success for personal gain, Brooks generously gave back to the places he loved, including his alma mater. Brooks’ story of loyalty to Clemson was made more profound by the way he gave. Rather than picking a cause to give to, Brooks selflessly asked former president Max Lennon to enlighten him on Clemson’s greatest area of need. President Lennon suggested a performing arts center. Although Brooks had no background in music or arts, he responded immediately to Clemson’s vision. His \$2.5 million gift established the Brooks Center for the Performing Arts,

“Performing arts was not on my dad’s radar when he approached the President about a gift for Clemson. But he responded to President Lennon, ‘If that’s what Clemson needs, then I’m all in.’”

- COBY BROOKS ’92, SON OF BOB BROOKS

enabling hundreds of thousands of patrons to experience world-class performances and giving students the opportunity to pursue their artistic passion.

Mark Brooks, Bob’s older son, graduated from Clemson in 1991 and had a promising future ahead of him. Tragically, his life was cut short on April 1, 1993, during a plane crash that also claimed the lives of NASCAR Champion Alan Kulwicki, Dan Duncan and Charlie Campbell.

Mark Brooks’ legacy continues to thrive through his father’s donation in 1994 to establish a sports science institute at Clemson University in Mark’s memory, along with the other victims of the crash. The Institute offers students experiential learning opportunities through academic programs, research and support for sports-minded organizations, keeping Mark Brooks’ spirit alive and helping future generations fulfill their potential. As a result of Brooks’ investment, students have the opportunity to discover and participate in internships at leading sports organizations such as the Philadelphia Phillies, Philadelphia 76ers, New York Yankees, Baltimore Orioles, Milwaukee Brewers, Dodge Rockwell’s motorsports division and ESPN. Brooks’ generous bequest continues to enhance the faculty and student experience at the Robert H. Brooks Sports Science Institute.

ROBERT H. BROOKS **SPORTS SCIENCE** INSTITUTE



The Robert H. Brooks Sports Science Institute at Clemson University serves as a multi-disciplinary platform for the academic study of sports sciences across the University. Through the foundation of four Legacy Professors in motorsports engineering, sports communication, sports management and sports marketing, the Institute defines, enhances and promotes the role of sports in academia and society. The Institute provides experiential learning opportunities through academic programs, research, sports organizations and support for service and outreach programs. Through all of its activities, the Institute prepares people to perform at the highest levels within sports industries and provides an acute understanding of the significance of sport in modern society.



To learn more, please scan the QR code.



BROOKS PERFORMING ARTS CENTER

Established in 1994, the Brooks Center for the Performing Arts has been Clemson's performing arts hub for almost three decades. This 87,000-square-foot facility serves as a professional roadhouse, hosting world-class professional music, theatre and dance performances throughout the academic year in its spacious, yet intimate, 979-seat proscenium auditorium. In addition to professional productions, the Brooks Center is also home to the Department of Performing Arts, offering a dynamic, hands-on undergraduate experience.



To learn more, please scan the QR code.

Brooks' extraordinary generosity grew upon the foundation of a long lineage of philanthropy, dating back to Thomas Green Clemson's original bequest to the state of South Carolina and W.B. Camp, who was born in Cherokee County, South Carolina, and earned a degree for agronomy at Clemson College in 1916. He worked for the USDA to develop a long-staple cotton supply for military aircraft during World War I and received a citation from President Lyndon B. Johnson for his efforts and contributions to American agriculture. Camp never forgot his alma mater or the support that made it possible for him to attend Clemson. He created a scholarship loan program so that students like Bob Brooks could pursue their dream of a quality education. Bob attempted to repay the loan, and Dean Walter Cox told him, "Please pay it forward." Bob never forgot the generosity of the people who paved the way for his remarkable success. He credited the Clemson faculty for helping him prepare for his future achievements, and throughout his life and even at death, he made sure his beloved Clemson would be a significant beneficiary of his estate.

Bob Brooks encouraged his children to attend Clemson. Coby Brooks '92 remembers the exact spot in his childhood backyard where his dad told him, "Son, you can go anywhere in the world to college, but I'm only paying for Clemson." Coby, who grew up a Tiger fan, did not need much encouragement to join his older brother at Clemson. Coby has continued his father's legacy of giving back to Clemson as part of the 1889 Vision Giving Society. His son, River, attended Clemson and graduated in 2019, continuing the family tradition. Though Bob Brooks passed away in 2006, his profound legacy continues to support and inspire future generations of Clemson students and faculty while paving the tradition of generosity forward. His loyalty and passion for Clemson stemmed from his appreciation of the support he received from the Clemson community and his desire to give back to the place that had given him so much.





Building Together: THE FRAMPTONS' LOVE AND GENEROSITY FOR THE CLEMSON FAMILY

Clemson University has a rich history, from its origins as a military college to its transformation into an outstanding R1 Carnegie research public university. As the world continues to evolve, so has the University. And thanks to the leadership and experience of individuals like Harry Frampton '67 and Susan Frampton, Clemson University has grown exponentially.

Growing up in Hartsville, South Carolina, Frampton was naturally drawn to Clemson. In his junior year, he met Susan, whom he later married. After graduating from Clemson, Frampton began a real estate career with Sea Pines Company in Hilton Head Island, South Carolina. His career led him across various cities and states: in 1976, he became President of The Brandermill Group in Richmond, and from 1982 to 1986, he served as the President of Vail Associates Inc., the premier operator of Vail and Beaver Creek ski resorts in Colorado and the largest operator of ski resorts in North America. Later, he formed East West Partners, which specializes in luxury real estate developments in Charleston, South Carolina; Denver, Colorado; Deer Valley, Utah; and Kauai, Hawaii. Frampton has been inducted into the Colorado Ski Hall of Fame and the Colorado Business Hall of Fame.

Frampton formed two other businesses in addition to East West Partners: East West Hospitality and Slifer Smith and Frampton. East West Hospitality, with an expert team of more than 1,300 employees, oversees over \$2 billion in managed assets,

"Clemson has always meant a lot to both Harry and myself as he was a student there, and it was also the first place we lived in our married lives. We are thrilled to be able to support this special school and its students in any way that we can."

- SUSAN FRAMPTON

including residential and commercial properties, vacation rental programs, retail and food and beverage operations, resort hotels and homeowner associations. Slifer Smith and Frampton is the number one real estate company in Vail, Beaver Creek, Breckenridge and Keystone and the largest real estate company in the Colorado mountain range with over 300 real estate agents. East West Partners currently has significant developments in the Charleston, South Carolina area, including Waterfront on Daniel Island, The Cape on Kiawah, and a historic renovation, 71 Wentworth, on King Street in Charleston.

As the Framptons moved around the world, their horizons broadened. Their exposure to diverse and multicultural environments made them realize the importance of diversity and its impact on society. Learning to work with others is an essential skill. The world not only requires people to work with those who look like themselves, but also with those who do not. Frampton decided that it was upon him to bring positive change to his alma mater — Clemson. The world is changing rapidly, and Clemson University, like other educational institutions, must equip students with the skills and knowledge necessary to work with people from different backgrounds, cultures and races.

The Framptons recognized the significance of establishing cultural spaces. Places where all would feel safe and comfortable, physically and mentally, to express themselves and celebrate their identities. They believe that architects and planners play a crucial role in developing these places. This inspired them to establish the Susan and Harry Frampton Scholars Program, which for over twenty years has provided financial assistance to six to nine underrepresented students per year in the School of Design and Building within the College of Architecture, Arts and Humanities. These scholars and fellows are selected from undergraduate students majoring in Architecture, Landscape Architecture, and Construction Science and Management and graduate students studying Architecture or Planning and Architecture with a real estate development emphasis, with priority going to in-state students. The Framptons hope these future architects will develop enriching communities and promote a culture of inclusivity.

The Framptons have also been a sponsor of the Clemson University Women's Roundtable. They recognize the valuable perspectives women bring and believe that empowering women is key to creating a richer and more vibrant society.



WOMEN'S ROUNDTABLE

The Women's Roundtable is a developmental and networking opportunity for participants to acknowledge, explore and invest in the promotion of the experiences of girls and women, particularly in STEM fields. It brings approximately 1,000 participants together and features well-known keynote speakers, a panel of women professionals, and various roundtable conversations regarding academic, career and personal achievement.



To learn more, please scan the QR code.



To the Framptons, Clemson means family. “Family is where people want to do good things and support each other,” said Harry. Clemson is a family and tremendous support system. They especially observe this within the football program, where Clemson’s coaches develop students as athletes and great leaders. Harry and Susan hold immense respect for head coach Dabo Swinney and wife Kathleen Swinney, and to echo their vision for outstanding leadership moving forward, they have made significant provisions in their estate to support Clemson Athletics. **The Framptons have hosted 50-60 Clemson Football coaches and their families in their home in Beaver Creek at the end of the recruiting season for the past 20 years.** During that time, the Framptons have learned many things through their observations and conversations with Coach Swinney that have helped them run their businesses. The Framptons have been married for over 50 years and have two sons and three grandchildren. They have made significant contributions to the University’s growth and success. From a \$1 million donation to the West End Zone to longtime membership of Riggs and the President’s Leadership Circle, the Framptons have committed to Clemson with their treasure and also with their time. Harry has served as the Chairman of the Clemson Foundation, a member of the President’s Advisory Board and has also chaired the Athletic Advisory Board.

From being a student at Clemson during the enrollment of Harvey Gantt, the first African American to enroll at Clemson, to becoming an instrumental member on numerous boards and councils, Frampton’s belief in the power of education has never wavered. Clemson University will continue its mission of transforming lives through education and research because of the intentional generosity of visionaries like the Framptons. Their contributions have made a profound impact on the University’s ability to adapt and innovate, creating a more diverse and inclusive community for all.





HEAR HER ROAR AND THE POWER WOMEN'S LEADERSHIP ACADEMY

Hear Her Roar, a fundraising initiative led by IPTAY, raises awareness and financial support for Clemson's women student-athletes. Hear Her Roar is grounded in three main impact areas: scholarships, state-of-the-art facilities and student-athlete experience. The momentum behind the growth of athletic opportunities for women at Clemson has never been more evident. Within the last decade, Clemson Athletics has added women's golf (2012-13), softball (2019-20), and women's lacrosse (2022-23) and announced the sponsorship of women's gymnastics, which will begin in the 2023-24 season. In the spring of 2022, a comprehensive women's athletic facility plan was formalized, and POWER: Women's Leadership Academy was launched.

"Support of these initiatives is not only an investment in the future of Clemson Athletics, but an investment in the future of our society— by providing financial assistance to these initiatives, we are empowering our female student-athletes to become leaders who will inspire and make a positive impact in their communities."

- STEPHANIE ELLISON-JOHNSON, EXECUTIVE SENIOR ASSOCIATE ATHLETICS DIRECTOR/ SENIOR WOMAN ADMINISTRATOR



To learn more, please scan the QR code.

Giving Back to Where You Grew Up: SUSIE ADAMS HELPS SHAPE THE FUTURE OF HER BELOVED CLEMSON

Susie Adams '83 has made a lasting impact on Clemson University through her leadership and generous support. Growing up in Seneca, South Carolina, Adams was taught the importance of doing what is right, which she carried with her throughout life. "Clemson is where I grew up. The diversity of people at Clemson exposed me to different life experiences, opened doors to new opportunities and ultimately changed my path in life."

Public speaking was a class that Adams dreaded. However, an uplifting voice put her nerves at ease. Adams had the honor of learning public speaking under the guidance of a Clemson legend, Col. Ben Skardon '38, who turned her fear of public speaking into a passion. Col. Skardon taught English and public speaking at Clemson for decades. His coaching and encouragement led Adams to pursue and attain a master's degree in speech communications at the University of Georgia.



Kappa Delta Seniors (first row, left to right) Melanie Leard, Linda Hancock, Susan Crawford, Mitzi Stewart, Lynne Greene, Pennie Howland, Barbara Pennic, Patti Jaynes, Kathy Bowman, Lisa Miller (second row) **Susie Adams**, Lynn Cantrell, Donna Holland, Barbara Bailey, Laura Nigro, Cindy Rodgers, Temple McTeer (third row) Dawn Moorefield, Annette Smith, Julie Hebbard, Elizabeth Daniels, Sheryl Wright, Pam Gibson, Jane Regan, Lisa Cheesman, Nanci Wells.

After completing her education, Adams followed in her father's footsteps at Duke Energy, where she served as the vice president of marketing and customer experience. She also dedicated herself to giving back to her alma mater, so current and future Clemson students can experience the same growth she had. Adams used her talents to serve on the advisory board for Clemson's Pearce Center for Professional Communications, and her dedication helped grow IPTAY's Hear Her Roar Campaign, which empowers female student-athletes with facilities, scholarships and leadership programs— like the POWER program, a women's leadership cause near and dear to her heart. The POWER Program helps female student-athletes develop the skills they need to succeed on and off the field or court. Adams has been a generous supporter of the program, which she believes can serve as a model for other universities across the country. In addition to her financial support, Adams has been a leader in Clemson's fundraising efforts, serving on the board of the Clemson University Foundation and as a lead sponsor for the Women's Roundtable.

Adams' commitment to Clemson is driven by her belief in the University's potential to positively impact society. "Clemson has grown in very positive ways, and I don't just mean numbers. I mean strategically, the quality of the faculty and students, the quality of the administration, the decisions that the University makes. Clemson is a place that I love and a place that I believe in," says Adams.

In addition to her ongoing support and involvement, Adams has made plans to leave an estate gift that will further enhance the campus important to her and expand her legacy at Clemson. Her gift will ensure that the University will continue to provide students with transformative experiences for years to come. Clemson continues to grow thanks to the dedication of generous alumni, like Susie, who continues to shape the future of Clemson and inspire future generations of students.





NATIONAL SCHOLARS PROGRAM

Since 2000, the National Scholars Program has offered unmatched learning experiences to a select group of Clemson University undergraduate students. It is Clemson’s most prestigious and selective undergraduate scholarship. Scholars are selected based on their ability to demonstrate academic excellence, intellectual curiosity, a wide range of interests and experiences, leadership ability, and the potential to make an impact on their local and global communities. Scholars receive a cost-of-attendance award and join a community of learners who are focused on making a difference. Scholars engage in cross-cohort mentoring and community-building activities, creating a cycle of learning and an ongoing Scholar community that will continue beyond their four years at Clemson.

“Being a member of the NSP gave me a home and a community of intellectually curious peers who genuinely cared about my happiness and holistic health and fostered a sense of belonging that carried me through my entire four years at Clemson.”

- VERONICA (RONNIE) CLEVENSTINE,
PROGRAM ALUMNA (2022) (2018 COHORT)



To learn more, please scan the QR code.

100 Years in the Making:
GIFT FROM 1923 ALUMNUS MAKES GRANT
WILKINS '23 DREAMS A REALITY

When William M. Ballenger graduated from Clemson in 1923, he could not have foreseen the remarkable legacy he would leave for future generations. He likely never imagined that his wife would take the \$300,000 he left in a marital trust and shrewdly invest it, transforming it into a \$3.4 million unrestricted gift before she too passed. His desire to give back to the institution that meant so much to him led them to establish a bequest, which came to fruition in 1999, providing the seed funding for the Clemson National Scholars Program in 2000. Little did they know that their act of generosity would make it possible for Grant Wilkins '23 to graduate from his beloved alma mater exactly 100 years later. The establishment of the National Scholars Program has allowed Clemson to attract and retain some of the brightest minds in the country, including Wilkins, who became a distinguished Goldwater Scholar and the University’s first Churchill Scholar.

The incredible gift from the Ballengers was instrumental in the establishment of Clemson’s National Scholars Program, which became a driving force for Wilkins to attend Clemson. Wilkins is a native of Kingsport, Tennessee. However, his connection with Clemson started at a Clemson Football game when he was six weeks old. As a senior in high school, Wilkins’s heart was set on Clemson, but the expense as an out-of-state student was something that may have kept him from attending his dream school. His life was forever changed when he received news that he was selected as a Clemson National Scholar.

A recent graduate, Wilkins was a double major in computer engineering and mathematical sciences. His outstanding academic achievements were recognized when he was selected as one of only 16 Churchill Scholars in 2023 from across the nation in the fields of science, math and engineering. The Churchill Scholarship funds one year of graduate study at the University of Cambridge.

Clemson’s abundant opportunity for research played a pivotal role in his journey to Cambridge. Wilkins highlighted Clemson’s commitment to research through programs like Creative Inquiry, research grants and financial support. “The ability

to attend Cambridge with four years of research experience is pretty rare when you talk to people from other schools like Berkeley or John Hopkins,” says Wilkins.

In addition, Wilkins praises the culture at Clemson. He enjoyed the easy accessibility of professors, whether it was dropping by during office hours or being invited to a dinner at a professor’s home. It made it easy for him to seek guidance and mentorship. “Things like this are what makes Clemson special,” said Wilkins. He also participated in faculty-directed study abroad trips to Paris and South Africa, where his relationships with cross-disciplinary members enhanced his college experience.

As a result of the Ballenger’s vision 100 years ago, and countless other supporters, Clemson can continue to attract students like Wilkins, who left an impactful legacy at Clemson through his accomplishments and activities. He was an active member of the Honors Student Advisory Board, served as the Vice President of the Blue Key Honor Society and played a key role in the Student Alumni Council, where he directed the Ring Ceremony. He also formed lifelong friendships and created memories that he will always cherish. Wilkins remains incredibly grateful for his Clemson Experience, which was made possible by our amazing donors, including the Ballengers. During his time at Clemson, he participated in every Legacy Dinner celebration and Fort Hill Legacy Society Bronze Leaf Dedication, volunteering as a speaker and host for current members of the Clemson Legacy Society.

Thanks to visionary investors like the Ballengers, students like Grant Wilkins are encouraged to reach for the stars, and Clemson is the catalyst to make their dreams come true.

Pictured: Grant holding 1923 TAPS displaying William M. Ballenger (3rd from left), an Electrical Engineer Major from Greer, SC. Bill was class historian freshman and senior years. Senior quote was, “Determination is the e. m. f. that forces the current of success through the resistance of life.”





Clemson Legacy Society Registry

The Clemson Legacy Society is an honor society explicitly created to recognize individuals who have included Clemson University in their estate plans. Members are invited to sign the Clemson Legacy Society Registry in the parlor of Fort Hill, by personal appointment, in the very room where Thomas Clemson and Anna Calhoun were married on November 13, 1838, and lived as husband and wife for more than 35 years. It was also through his will that Mr. Clemson created what we know and love today as Clemson University. It was a dream of Anna and Thomas to create a higher seminary of learning. From the inception of the idea for Clemson, deferred gifts have been essential to our continued success. Throughout the year, we offer specific dates and times for members to sign their names in this treasured keepsake.

This tradition began on the 120th Anniversary of the last signing of Thomas Clemson's will establishing the University. It is an archived ledger that serves as a permanent record of Clemson's Society Members and as a testimony to the importance of philanthropy from donors who have made the perpetuation of our legacy part of their legacy. Many donors bring their children and grandchildren to witness their signing of the registry – an experience that is meaningful to everyone.

Legacy Society Celebration Dinner

The Clemson Legacy Society Celebration Dinner is held every fall to honor the Legacy Society members who have followed Anna and Thomas Green Clemson's visionary act of philanthropy. On November 6, 1886, Mr. Clemson signed the final draft of his last will and testament, leaving his fortune and the Fort Hill estate to the people of South Carolina for the creation of a "high seminary of learning" that bears his name. The gift was approved by the governor of the state of South Carolina on November 27, 1889. The wise and generous investment from Mr. and Mrs. Clemson is the foundation for Clemson University today – and the cornerstone for everything that Clemson will become in the future. The dinner celebrates the unwavering commitments of current society members, and the commemoration and induction of new members.



Fort Hill Legacy Society Bronze Leaf Dedication

The Fort Hill Legacy Society Leaf Ceremony occurs at the historic site of the University's first Board of Trustees meeting. This honorary group consists of individuals who have donated a gift of \$1 million or more to the University upon their passing. The ceremony is held to honor the philanthropic legacy of Anna and Thomas Green Clemson, who founded the University, and to pay tribute to those who have established their own legacy at Clemson. Each visionary is given special recognition through a bronze leaf commissioned with their signatures and a notation of their Clemson Journey, which is permanently affixed on the grounds of Fort Hill. Inductees are also recognized annually by their beneficiaries at a special ceremony under the Second Century Oak at Fort Hill. Each of these leaves represents an enlightened act of philanthropy that will benefit Clemson forever.



2009 HONOREES:

Thomas G. and Anna Calhoun Clemson

William M. and Florence Coles Ballenger

Wofford B. and Louise Phifer Camp Sr.

Ernest L. Corley Jr.

Charles E. and Homozel Mickel Daniel

Mary Katherine Littlejohn

Clyde V. and Mamie Westendoff Madren Sr.

2010 HONOREE:

Earl C. Ray

2011 HONOREE:

Margaret Kanapaux Sullivan

2012 HONOREES:

Robert Howell Brooks

Kenneth G. and Caroline Barton Caughman Jr.

2013 HONOREES:

Porter H. and Sara L. Adams

2014 HONOREE:

Robert P. "Pat" Jenkins

2015 HONOREES:

R. Roy and Margery W. Pearce

2016 HONOREE:

William "Bill" Brooks Thayer

2017 HONOREES:

Samuel B. and Patricia O. Deal

2018 HONOREES:

Homer E. McConnell, Jr. and Peggy W. McConnell

2019 HONOREES:

Jerry E. Dempsey and Harriet Calvert Dempsey

2021 HONOREES:

John D. and Alice C. Lamar

2022 HONOREES:

William "Bill" C. Nettles, Jr. and Patricia M. Nettles

Michael G. Roetnor, Margaret Roetnor, and Phyllis Roetnor



Gift Planning Options and Benefits

MAKE A PLAN TO SUPPORT THE FUTURE OF CLEMSON UNIVERSITY

You can join the growing number of alumni and friends who invest in the University's future by including Clemson as a beneficiary of their estate plans. You can also make a gift now and receive income for the rest of your life. Gifts like these offer significant tax benefits as well as greater financial flexibility in meeting your personal and philanthropic goals and objectives.

PLANNED GIFTS INCLUDE:

- 🌸 **Plans from your estate**
Bequests are gifts you establish through your estate plans.
- 🌸 **Plans that pay you an income**
You make a gift to the University and receive income for your life or the lives of the beneficiaries you choose.
- 🌸 **Plans that help the University now and your family later**
The University uses the income from your gift for a specified period of time and then returns the remainder to you or your heirs.

A TAX-WISE AND FLEXIBLE WAY TO GIVE

Giving to the University through your estate is often referred to as a "bequest." A bequest from your estate may include cash, securities, real estate and/or personal property, which can be for a specific amount or a percentage of your estate.

ENJOY EASE AND FLEXIBILITY OF GIFTS FROM RETIREMENT ACCOUNTS

Giving through your retirement plan is an excellent way to support the University. Assets you designate from an individual retirement account, pension, profit-sharing plan, stock bonus plan, 401(k), 457, 403(b), SEP or SIMPLE plans may be eliminated from your taxable estate, and all retirement assets will also pass free of federal and state income tax. You may adjust your beneficiary designation anytime.

Designating the University as a beneficiary of your retirement plan:

- Ensures that the University's program receives the full value of your gift.
- Removes assets from your estate, potentially reducing estate tax.
- May allow you to distribute a greater portion of your assets to your heirs.
- You may change the beneficiaries of your accounts at any time.

RECEIVE GUARANTEED INCOME FROM A CHARITABLE GIFT ANNUITY

A charitable gift annuity is a contract between the donor and the Foundation. The donor makes a gift, and in return, the Foundation provides fixed payments to the donor(s) for life. At the end of the contract term, the remainder is used for the purpose the donor designated to a program area.

- A gift annuity is an irrevocable gift to the Clemson University Foundation and can be established with a minimum of \$10,000.
- The minimum age to fund an immediate gift annuity is 65; however, you may establish a CGA anytime and defer payments until age 65.

- Annuity payment amount is based on the age of the individuals receiving the income.
- You can be eligible for a charitable tax deduction the year you make the gift and includes a carry-forward provision for the next five years. The deduction is the present value of the expected future gift.
- If you fund your gift annuity with appreciated assets, capital gains will not be realized in the year of the sale.
- A portion of the annuity income may be tax-free.

**Starting in 2023, if you are at least 70 1/2 years old, you may use an IRA Qualified Charitable Distribution (QDC) transfer to create a charitable gift.*

Please call the Office of Gift Planning at 864-656-0663 or 800-699-9153 to determine if this option is available in your state.

POTENTIAL INCOME FROM CHARITABLE TRUSTS

Similar to a Charitable Gift Annuity (CGA), a Charitable Remainder Trust (CRT) provides fixed or variable payments for life or a selected number of years.

A charitable remainder trust:

- Minimum of \$100,000 is recommended.
- Charitable tax deduction equal to the present value of the future gift and may reduce estate taxes.
- Ensures your philanthropic desires are realized during your lifetime.

**Starting in 2023, if you are at least 70 1/2 years old, you may use a QCD transfer to create charitable remainder trust. There are some nuances we will be happy to discuss with you.*

MAXIMIZE YOUR IMPACT

Giving a life insurance policy can be an excellent way to make a gift. Existing policies that are no longer needed to satisfy their original purpose can be an ideal asset to fund a charitable gift.

SUPPORT YOUR PASSION TODAY WITH A QCD TRANSFER

If you are at least 70 1/2 years young, you are eligible to make a Qualified Charitable Distribution (QCD) from your IRA(s) of up to \$100,000 per person in outright gifts directly to Clemson, including a one-time-only QCD of up to \$50,000 to create a life income gift. QCDs count toward required minimum distributions, and QCDs used to make outright gifts are excluded from federal taxable income entirely (payments you receive from a life income gift will be taxed as ordinary income when received).

MAKE AN IMPACT WHILE MAINTAINING LIQUID ASSETS

You may donate your vacation home, vacant lot, farm or office building. Real estate can be contributed outright or used to finance a planned gift. Available options include a retained life estate, which allows the donor to continue to use the property for a certain number of years or the donor's lifetime. Other arrangements offer special tax advantages and lifetime income.

Clemson's Endowment By the Numbers

ENDOWMENTS ARE A PERPETUAL SOURCE OF STRENGTH

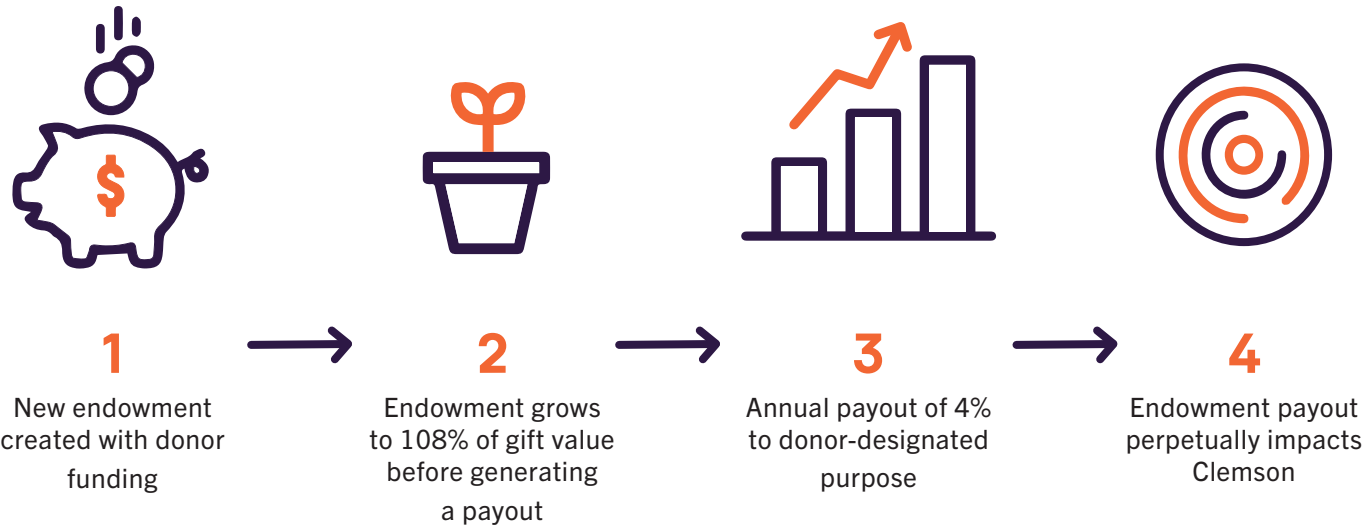
Endowments produce a steady stream of funding for professorships to recruit and retain distinguished faculty; scholarships and fellowships to support deserving students; lectureships to bring distinguished speakers to our campus; library acquisitions; and academic prizes to recognize outstanding students and faculty. The University's unrestricted endowment generates vital funding for operations and enables the University to respond to important needs as they arise. Endowments must be funded at certain levels and may be designated for any college, school, department or program at the University. They may also be named in honor or memory of a loved one.

SOUND INVESTMENT, STRONG GROWTH

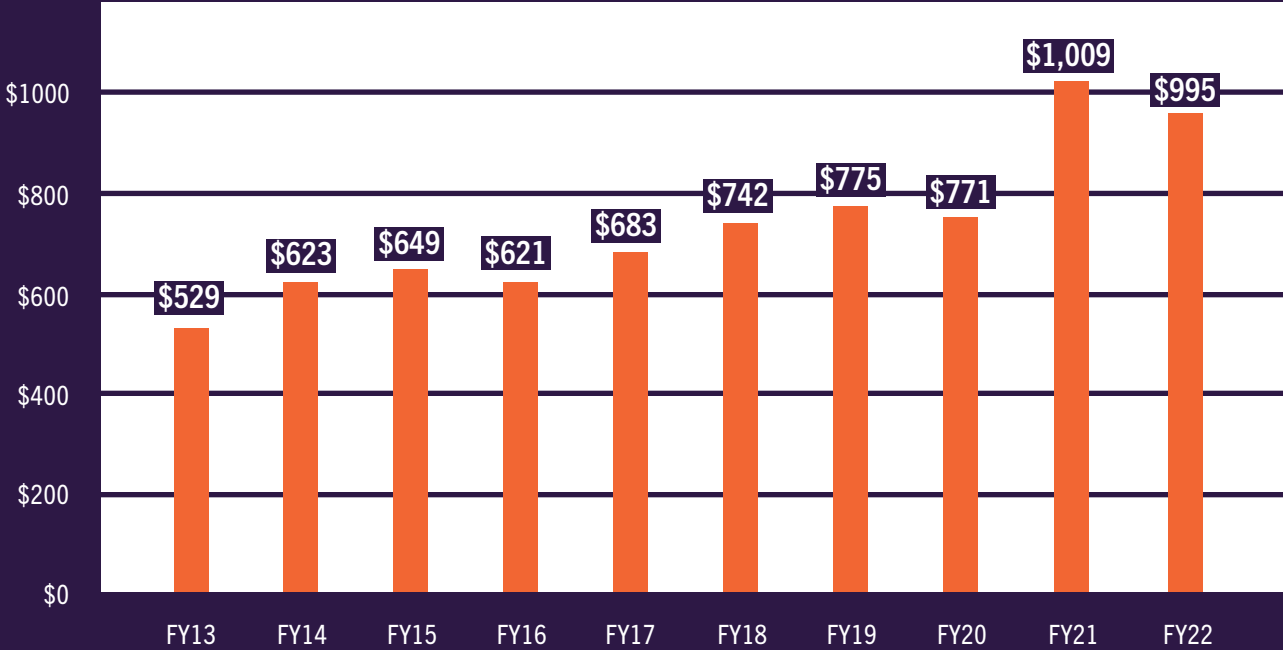
Your endowed gift is a vital investment in Clemson University. Thanks to the expert management of the Clemson University Foundation (CUF), the University's strong endowment has been a critical asset in expanding Clemson's programs and launching new initiatives. An effective long-term investment strategy helps maintain the endowment's value over time and provides a steady and growing stream of income essential to funding teaching, scholarships, facilities, world-class research and public service initiatives.

Phases in the Life of an Endowment

BASED ON CURRENT POLICY



Value of Endowment in Millions



\$187 MILLION

Over the decade ending June 30, 2022, \$187 million was paid out from the Endowment to support donor-designated purposes.



\$595 MILLION

All-time gift value of the endowment



2,219

Endowments

DID YOU KNOW?

The endowment funds are held and managed by the Clemson University Foundation (CUF). The investment committee of its board of directors, working with the chief investment officer and investment consultants, provides policy and direction for the investment and management of the endowment funds while maintaining prudent fiduciary standards.

Each of the 2,219 endowments managed by CUF essentially operates as an independent account. The assets of the individual funds are pooled and invested as a single portfolio.

Endowment Payout

FISCAL YEAR 2023 PAYOUT BY PURPOSE

Each year, endowments pay out 4 percent for donor-designated purposes.
The sum of all payouts in the fiscal year beginning July 1, 2022, is over **\$27 million**.



JOVANNA J. KING 🐾

Senior Associate Vice President of Development
Advancement Division
864-656-0663 / Cell: 864-940-7983
jovanna@clermson.edu



For more information on ways to give or to reach out to our team, please scan the QR code above to visit our Planned Giving website.

DANIEL WISEMAN

Executive Director of Gift and Estate Planning
Planned Giving
864-656-0975 / Cell: 678-773-4770
wisema2@clermson.edu

ERIN BYRD

Director of Gift and Estate Planning
Planned Giving
864-656-0443 / Cell: 864-214-5568
eqbyrd@clermson.edu

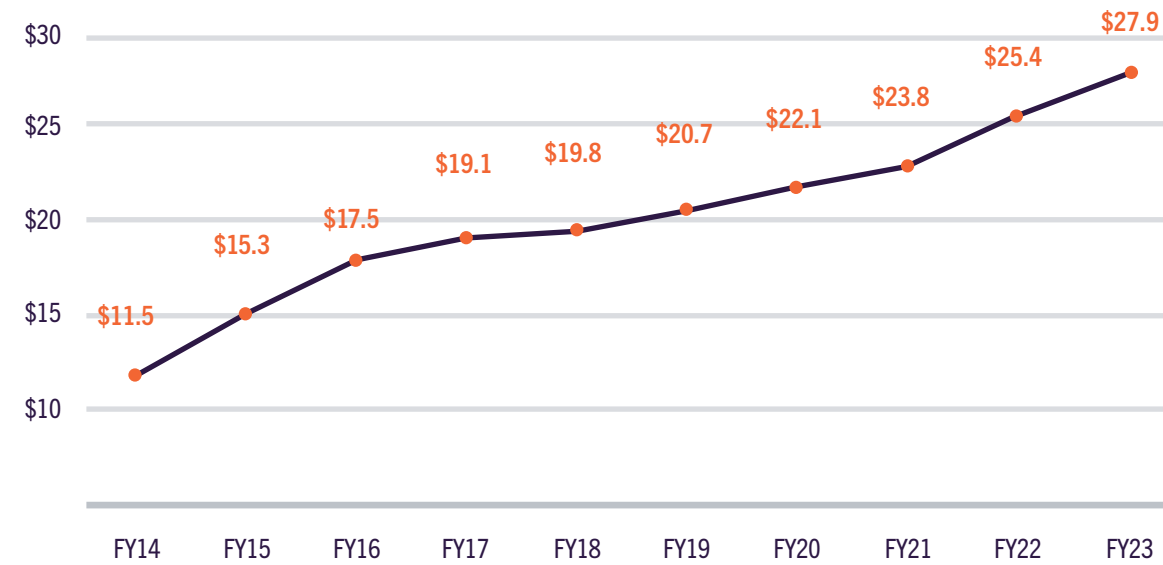
KIM GIBSON

Development Coordinator of Principal Gifts/Gift and Estate Planning
864-656-8009
kgibso2@clermson.edu

CINDY BARNES

Administrative Coordinator
Planned Giving
864-656-5538
cdomen@clermson.edu

ENDOWMENT PAYOUT IN MILLIONS





CLEMSON
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110 Daniel Drive Clemson, SC 29631
Phone: 864-656-5891 | clemsongiving.org