



Taking the Lead

“Leadership through charitable giving at the University of South Alabama”

Letter from the *President*

Dear Friends,

To date, Campaign USA: *Leadership* has raised more than \$56 million. The tremendous enthusiasm and dedicated hard work of our Leadership Team of volunteers is largely responsible for the rapid progress we have achieved. Our Leadership Team is comprised of over 50 civic, local and national leaders – many of whom are non-alumni – who are literally “taking the lead” to ensure the continued growth of the University of South Alabama. On behalf of the faculty, staff, students, and the health care community we serve, I wish to thank these volunteers for their efforts that are *Making a Difference* at the University of South Alabama.

Some of these dynamic volunteers are loyal alumni who continue to serve their alma mater in leadership roles. You may recall from our last issue that Mr. James A. Yance, Class of 1970, was appointed to the Board of Trustees in October 2006. I am pleased to inform you that at the June meeting, Mr. Yance was elected to serve as vice chair of the Board. He also remains as chair of Campaign USA: *Leadership*. In addition, Dr. Steven Stokes – College of Medicine Class of 1980 and appointed to the Board of Trustees in 1993 – is the first alumnus to be elected chair of the Board. To them I extend our sincere gratitude for their service and dedication.



With the start of a new academic year come new beginnings; let us be thankful for our accomplishments yet keep in mind that there is still much work ahead. Thank you again to all who have contributed to the campaign thus far.

Sincerely,
V. Gordon Moulton

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Corcorans Create Athletic Scholarship Endowment



Thomas and Barbara Corcoran recently established the Corcoran Scholar-Athlete Endowed Scholarship at USA with a gift of \$50,000 to Campaign USA. Their gift will be matched by the University to create a \$100,000 endowment, the largest athletic scholarship endowment to date at USA. Earnings on the endowment will support a scholarship for a junior at USA who excels in both sports and academics. Students will be nominated by the head coach in each USA sport and a winner will be selected by an awards committee.

Thomas and Barbara Corcoran recently established the Corcoran Scholar-Athlete Endowed Scholarship at USA with a gift of

“Barbara and I are quite happy to continue supporting the Campaign USA initiative, said Corcoran. “The University, under the leadership of Gordon Moulton, and the campaign, under the leadership of Joe Busta, clearly show the University is headed in the right direction and we are delighted to play a very small part,” he added. The Corcoran’s previously gave \$100,000 to the campaign designated for medical, continuing education, and business scholarships as well as an endowed fund to the Mitchell Cancer Institute.

The Corcorans are both USA graduates: Tom is a 1970 graduate of the Mitchell College of Business and a member of the Campaign USA Leadership Team. Barbara recently completed her residency in family practice at USA.



A Message from the Campaign Director

Dr. Joseph F. Busta, Jr.
Vice President for Development and Alumni Relations

One of the basic tenets of fund-raising is recognizing the importance of growing the number of donors in an ongoing campaign. Obviously, in general more donors will provide access to more resources; however, there is another equally important factor at work here. Our task is to also grow the number of donors who will make multiple gifts to the University – even after the campaign is over. Through stewardship and our good faith use of their resources, donors are more likely to continue support of USA and thereby ensure our growth, which is so vitally important to a young institution such as ours.

We see this phenomenon at work in Campaign USA - As we close in on the end of the second public year of our campaign, more than 15,000 donors have made close to 26,000 gifts. Now it is up to us to build on this momentum through the close of the campaign by identifying new donors, maintaining the confidence of our current donors, and sharing our successes with you. In this edition of “*Taking the Lead*,” we’ll look at some of our recent contributions and the endeavors supported, as well as the donors who have made them possible.

Board of Trustees Update



Dr. Steven H. Stokes

At its meeting on June 14, 2007, the University of South Alabama Board of Trustees elected Dr. Steven H. Stokes as Chair Pro Tempore for a three-year term. Stokes, a native of Dothan, received his medical degree from USA in 1980. He currently practices radiation oncology in the Dothan and northwest Florida area and serves as a member of the University’s Campaign Leadership Team. Dr. Stokes was appointed to the Board of Trustees in 1993 and previously served as vice chair of the Board.

“Dr. Steven Stokes has a long history of supporting his alma mater, the University of South Alabama, including service as a trustee and a major philanthropic contributor,” said USA President Gordon Moulton. “We look forward to continuing to benefit from his leadership and perspectives as board chairman. His perspective of being both a physician and an alumnus brings every

valuable asset appropriate to the mission of the University. The development of our relationship with Infirmary Health System, maturity of the Mitchell Cancer Institute, and future growth of the College of Medicine make his leadership very timely.”

Mr. James A. Yance, a 1970 graduate of USA and chair of Campaign USA: Leadership, was elected board vice chair. Mr. Yance is currently “Of Counsel” to the firm of Cunningham, Bounds, Crowder, Brown, and Breedlove, LLC. Ms. Bettye R. Maye, a retired educator from York, Alabama, was reelected secretary of the board.



James A. Yance



Bettye R. Maye



USA Graduate Judy Culbreth Establishes Mobile Bay Heritage Award

Judy Culbreth, a 1972 alumna of the University of South Alabama College of Arts and Sciences, has established a new fund to support projects highlighting local history, archaeology, and culture. This award, named the “Mobile Bay Heritage Award,” was established with a gift of \$25,000, which will be matched by the University to create a \$50,000 endowed fund. This endowment is a significant new resource for the College of Arts and Sciences and will benefit students, faculty, and area residents.

“I don’t know how I would have gone to college without the University of South Alabama,” Culbreth said. “From deep in my heart, I wanted to acknowledge what the University had done for me. I also wanted to challenge the University to continue its commitment to the community and to preserve its history and culture.”

Culbreth was recently recognized as a University Distinguished Alumna during a ceremony in February. After graduating from USA, Culbreth built a successful career in publishing, holding leadership positions at *Seventeen Magazine*, *Working Mother*, and *Parent & Child*. She served as executive editor at *Redbook* and was one of the founders of the annual “Take Our Daughters to Work Day.” She currently serves as editor-in-chief of *Mobile Bay Monthly*, a lifestyle magazine covering the Bay area.

Dr. Monte L. Moorer Foundation Gives USA Children's and Women's Hospital \$500,000 Toward Radiographic/Fluoroscopic Suite

University of South Alabama's Children's and Women's Hospital received a \$500,000 gift from the Dr. Monte L. Moorer Foundation to modernize and upgrade a suite that will be utilized for diagnostic testing of neonatal, pediatric, and obstetric patients. The new *Louise R. Moorer Radiographic/Fluoroscopic Suite* will include diagnostic equipment that will allow radiologists to visualize and test what is going on inside a patient's body.

Mrs. Bradley Goodyear Smith, Chair of the Moorer Foundation's distribution committee, said, "We wanted to make a significant

impact on the health care of the region through our gift. It is an important part of our mission to improve the wellbeing, on every level, of the people across the region."

Dr. Becky DeVillier, USA Children's and Women's Hospital Administrator, said, "This suite and its associated diagnostic equipment allows us to provide the lowest dose of radiation possible to detect diseases, an important consideration when conducting radiological examinations of neonatal, pediatric, and pregnant patients. This gift will help our patients tremendously."

Meisler Hall Featured on AT&T Real Yellow Pages Directory Cover

On June 20, AT&T Advertising and Publishing unveiled the 2007-08 Greater Mobile edition of the AT&T Real Yellow pages directory, featuring USA's Meisler Hall. Named in honor of Herbert and Fanny Meisler of Mobile, Meisler Hall is the new 43,000 square foot student services building at the University.

"It is appropriate that Meisler Hall be depicted on the AT&T Real Yellow Pages directory because it is a very public building that serves the needs of every student who enrolls at the University of South Alabama, from the time they are admitted until they graduate and find employment," said USA President Gordon Moulton. "It is also fitting that the book acknowledges the generous support of the Meisler family, who helped make possible this important facility." The Meislers donated \$2 million to endow the building as part of Campaign USA.



Alumni Extraordinaire

Occasionally, schools are fortunate enough to have distinguished alumni whose very names become synonymous with the school. These "alumni extraordinaire" are those wonderful graduates whose closest friendships were formed on the college campus; they return to campus to attend baseball games in the rain, homecoming events in the bitter cold, and advocate for the school, their alma mater, at every given opportunity. They build successful careers and become community contributors. And more. **Bruce and Patricia McCrory** are two of South Alabama's *alumni extraordinaire*.

Recently, Bruce '72 and Pat '74 established the Bruce and Patricia McCrory Endowed Scholarship in the College of Arts and Sciences where each earned their degrees (Bruce a BA in psychology and Pat, a BA in political science). Their gift of \$25,000 was matched by the University and will be used as a scholarship award in a number of different principals within the college.

As alumni, Bruce and Pat have supported a number of University of South Alabama programs. They have made annual contributions to the Children's and Women's Hospital and provided support to a number of athletic programs. Bruce, a former president of the National Alumni Association, served on USA's first-ever all alumni based committee to raise funds for the construction of the Learning Resource Center adjacent to the Mitchell College of Business. He currently serves on a second alumni based committee formed to raise funds for the college's renovation and recently agreed to serve on the College of Arts & Sciences Advisory Board.

Together with his brother Don, Bruce established a commercial roofing business – Kiker Corporation. The Kiker name came from the brothers' father's middle name. The company, established in 1979, has grown into one of the leading commercial roofers on the Gulf Coast. Don and Bruce act as the principals and Pat, with her experience in finance, is the company's controller.

Bill and Anita Bush make joint Leadership Gift through 2007 USA Faculty/Staff Annual Fund

Mr. and Mrs. Bill Bush, both USA employees, have committed to a \$25,000 gift to establish the **Bill and Anita Bush Endowment for the USA Trauma Center**. This gift is being matched by the University to create a \$50,000 endowment.

"A growing institution like USA has many important areas needing support. Because both of us have worked in the healthcare industry for over 20 years, we wanted our gift to impact this area. We decided to make our gift to the trauma center for three reasons. The first is because the USA Trauma Center provides an important service to our community and toward the education of future healthcare professionals. The second reason is the critical need for funding to help offset the cost of new equipment and around the clock staffing of physicians and support personnel needed to operate a trauma center. The fact is level one trauma centers cost more to operate than they make. That is why no other hospital in the area has one. The third reason is we hope others interested in giving will consider the trauma center as a worthwhile option when they are deciding the best way to put their gift to use," explained Bill Bush.

Bill and Anita's gift was made through the *2007 Faculty/Staff Annual Fund* that generated more than \$340,000 for programs across the University during a six-week fundraising drive.

New Melton Center for Entrepreneurship

1981 Mitchell College of Business alumnus, Christopher C. Melton, recently gave \$250,000 to establish the Melton Center for Entrepreneurship within the USA Mitchell College of Business. Because he is an alumnus, Mr. Melton's gift was matched by the University, bringing the total endowment to \$500,000. His gift will support the operating expenses of the center.

In addition, Mr. Melton endowed a \$12,500 scholarship in honor of his parents for students pursuing a degree in this new field. After University matching, the Carl C. and Jewel O. Melton Endowed Entrepreneurship Scholarship totals \$25,000 and will provide a five percent payout for an annual award of \$1,250 in perpetuity.

Dr. Carl Moore, Dean of the Mitchell College of Business, stated: "Chris has shown tremendous support of the Mitchell College of Business. He is truly a University success story, and his gift will

provide the foundation to build an outstanding entrepreneurship program at USA.

Mr. Melton is a co-founding partner of the Atlanta-based private investment firm, the White Oak Group. He also serves as Co-Chairman of Finance and Operations for Dataline, Inc., and he is Vice President of Finance and Operations for Datapath, Inc. In September, Mr. Melton will be returning to campus to serve as an Executive in Residence at the Mitchell College of Business.

Teacher Appreciation

Many successful professionals credit a particular incident, individual, teacher, or professor with making a significant impact on their lives. Unfortunately, many of these mentors never know of their important effects on others. Alumnus and Assistant Athletic Director John Goodroe has chosen to show his gratitude for a special professor by creating an endowed Library Book Fund in his name. He created the Dr. Ellwood (Woody) B. Hannum Endowed Library Book Fund in appreciation of the guidance, encouragement, and mentorship Dr. Hannum provided to him and others. "Dr. Hannum was the main reason I stayed in college. He instilled a love of books in me and actually thought I had great potential!"

John's generosity will enable the University Library to purchase books using earnings on the endowment forever. "I have known Woody for thirty-two years and there is one behavior that has stood above the rest, his great love of books. He continually reads and is open to new ideas and ways of thinking about issues. I have found him to be a wonderful colleague and friend. There is no better way to honor him than to endow a book fund for the USA library," said Dr. Tom Wells, Dean of the School of Continuing Education and Special Programs.

2007 Faculty Staff Annual Fund Was a Great Success!

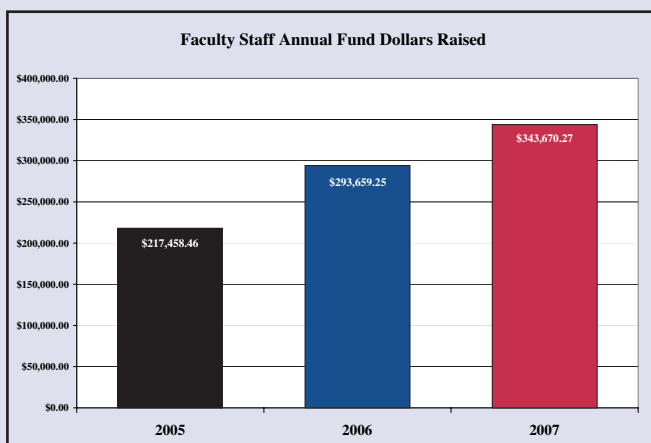


University of South Alabama Faculty and Staff wrapped up their annual campaign in May with great success! To employees, USA is *more than a place to work*.

"I contribute to the Annual Fund because I believe that by giving back, in some small way I am showing that USA is more than just a place of employment or a degree. It is a driving force in the local economy and under current leadership is poised to affect the region in a more positive way than ever before," said Keith West with the University Police Department.

The six-week drive raised a record \$343,670 to support programs across the University's academic, athletic, and medical areas. This year, 64% of employees participated, an increase of 11% over last year. Beth Anderson, Administrator and COO of the Medical Center, and Tom Wells, Dean of the School of Continuing Education and Special Programs, headed this year's successful efforts as co-chairs.

Faculty Staff Annual Fund Results



USA Graduate Establishes New Scholarship Program

Mr. and Mrs. Jake Gosa have established a student scholarship program benefiting the Mitchell College of Business and the College of Nursing. Jake Gosa is a 1972 business graduate and his wife Pat is a trained nurse. The couple visited campus last fall after more than 30 years away so that Mr. Gosa could share his expertise with students as a visiting executive lecturer at the Mitchell College of Business.

Mr. Gosa is the Chairman and Chief Executive Officer of American Woodmark Corporation, a leading

national cabinet manufacturer. Under Gosa's leadership, annual sales at the company have grown from \$200 million to over \$777 million and the company currently employs over 6,300 workers. Mr. Gosa joined the company in 1991 and has been its leader since 1996.

Interaction with students and a belief in the importance of higher education led Mr. and Mrs. Gosa to make a \$200,000 gift to establish an endowed student scholarship fund. Their gift was matched 100% by the University, creating a \$400,000 fund. This is a

significant new resource for USA students and will be an important recruitment and retention tool for the Mitchell College of Business and the College of Nursing.

During Mr. Gosa's presentation on campus, he encouraged students to set their career goals early and shared that employers value honesty, integrity, and a willingness to learn and grow. Mr. Gosa has also established an internship program through American Woodmark Corporation to provide opportunities for USA graduates.

Multiple Matches Triple Alumnus' Gift

Timothy K. Driggers, a 1984 graduate of the Mitchell College of Business, recently endowed a scholarship for accounting majors from his hometown. The Timothy K. Driggers Endowed Scholarship in Accounting will fund an annual tuition award for top accounting majors from Elba High School or Elba County, Alabama. The scholarships can be renewed each year based on the student's academic performance.

Mr. Driggers, who now resides in Texas, was a fellow classmate of USA National Alumni Association President Diana Laier. Encouraged by their correspondence via e-mail about Campaign USA: *Leadership*, Mr. Driggers knew he wanted to support his alma mater. He joined the USA Alumni Association and made a commitment of \$12,500 to endow a scholarship to support students in his college. As an alumnus, his gift was matched by the University and he knew his employer EOG Resources also matches charitable gifts. By requesting the matching gift form from his company and submitting it to the USA Development office, Mr. Drigger's enabled his gift to be matched for a second time! "This gift is an excellent example of what can be accomplished when an alumnus, the University, and an employer join forces to better our institution. Mr. Drigger's gift clearly demonstrates how important contributions from alumni who work for matching gift companies are for our Campaign," said Dr. Joe Busta, Vice President of Development and Alumni Relations.

UPDATE

Mr. Driggers has pledged an additional \$12,500 to the Timothy K. Driggers Endowed Scholarship in Accounting. With the University and his company matching this gift too, the total contribution to this endowment comes to \$75,000. What an impact matching gifts can make!

Bell Tower and Alumni Plaza Campaign is Underway



The University of South Alabama and its National Alumni Association's Bell Tower and Alumni Plaza Campaign to raise \$2.7 million is underway. As of September 1, over \$2,150,000 had been raised. Aggressive fundraising is making progress toward the goal and ground is expected to be broken by year's end.

The complex will add a stunning architectural feature on campus, a prominent center of student life, and a historic tribute to the most committed alumni and University leaders. It will be located between Alumni Hall and the Mitchell Center.

The complex will include: a beautiful tower over 100 feet tall; a seating area for 142 people in an open-sided, multi-purpose activity space under the tower; two arbors; Walls of Honor; an alumni plaza with benches and walkways; and an amphitheater that will accommodate 300.

Naming opportunities are available for many of the architectural features in the complex. Alumni, University faculty and staff, and University friends will have exclusive rights to have their name inscribed on the "Walls of Honor" through a Lifetime Association memberships. To become a member of the Alumni Association, visit www.southalabama.edu/alumni.

For information, contact Carol Kittrell in the Office of Alumni Relations at (251) 460-7084.



AHEPA Gives \$100,000 to Endowment in Hellenic Studies

The Mobile Chapter of the American Hellenic Educational Progressive Association (AHEPA) has donated \$100,000 to USA's Endowment in Hellenic Studies. This gift was matched dollar for dollar by the University to create a \$200,000 increase in the Hellenic Studies fund. The fund will be used to enhance the academic resources required for the study of philosophy and classical Greek and to support undergraduate study in Greece.

AHEPA is the largest association of U.S. and Canadian citizens of Greek heritage.

Goals of the group include promoting Hellenism, education, philanthropy, and civic responsibility. This recent gift by the local AHEPA chapter represents an ongoing relationship that the group has developed with the University.

"We need to ensure that future generations of students, Greek-American among them, come away from their undergraduate experience fully aware of the crucial role Greece played in the development of western civilization," said Nick Stratas, former president of the local AHEPA chapter. "A successful drive will mean that the voices of classical Greece will be heard in perpetuity at the University of South Alabama."

Ernest G. DeBakey Charitable Foundation

The Ernest G. DeBakey Charitable Foundation donated \$280,000 to establish The Ernest G. DeBakey Scholarship Fund in the USA College of Medicine. The DeBakey Scholarship Fund will award two full four-year medical scholarships to students who agree to practice in underserved rural Alabama upon completion of their primary care residency.

With the increasing shortage of physicians in rural areas of Alabama, a need exists for more graduates to enter primary care residencies and to practice in areas where access to health care is severely limited. To address this need, the USA College of Medicine is honored to partner with The DeBakey Foundation to help in a concrete way to alleviate the shortages of physicians in the underrepresented rural areas of the state. With the incentive of the DeBakey Scholarship, combined with a mentoring program within the College of Medicine, more medical students can be directed toward practicing in the areas of the state where the need is greatest.

The University is very grateful to The Ernest G. DeBakey Charitable Foundation for establishing this unprecedented scholarship program, which benefits deserving medical students and will ultimately improve health care for Alabama rural communities in the future.

Record Support for USA Children's & Women's Hospital

The 22nd Annual Children's Miracle Network Celebration broadcast June 3 from USA Children's & Women's Hospital and Fox 10 raised a record \$736,000 for the hospital's pediatric services. This represents a 19% increase over last year.

The event featured Fox 10 news anchors, hospital employees, inspiring stories of "miracle children" and videos of the comprehensive pediatric care available at USA Children's & Women's Hospital.



Proceeds to Benefit Breast Cancer Research at the Mitchell Cancer Institute

Greg Harvell of G Harvell Men's Clothier of Mobile has launched a new sportswear line, Shrimp for Life™, that supports the Mitchell Cancer Institute at the University of South Alabama. Ten percent of the proceeds from the sale of the Shrimp for Life™ products are donated directly to the Mitchell Cancer Institute and designated specifically for breast cancer research. The Shrimp for Life™ line currently offers shirts and caps. Mr. Harvell and his wife, Nancy, plan to expand the line and add additional products such as ties, shorts, and women's apparel.

The Harvells have pledged \$5,000 in proceeds to the USAMCI for a patient treatment sub-waiting room. Their gift is part of the Audrey Joyce Grodnick Breast Cancer Endowment Fund.



Upcoming Events

Sunday, October 7, 2007

Point Clear Polo Classic- The Grand Hotel Cup

The Point Clear Polo Foundation continues the tradition of the popular fall polo event with the annual Point Clear Polo Classic. The weekend will begin with a Players' Party on Friday, October 5th, followed by Sunday's club polo match, luncheon under the tent catered by Martha Rutledge, a featured polo match, an upscale silent auction and an enjoyable afternoon for the entire family. Proceeds will primarily benefit the USA Mitchell Cancer

Institute. For tickets and more information, call (251) 929-3758 or visit www.pointclearpolo.com.

Thursday, November 1, 2007

USA Donor Appreciation Breakfast

Mark your calendars now for our 3rd annual Donor Appreciation Breakfast, held to honor those who give so generously to USA. More details will be mailed at a later date.

Friday, February 15, 2008

USA National Alumni Association Distinguished Alumni and Service Awards Program

The Distinguished Alumni Award is awarded to alumni who have demonstrated

outstanding achievement and/or leadership in their chosen fields of interest or to the University of South Alabama. The Distinguished Service Award is awarded to individuals for exceptional or continuing service to the University of South Alabama or the National Alumni Association. To purchase tickets, sponsor a table, or for more information on this 4th annual black tie event, contact Carol Kittrell in the Office of Alumni Relations at (251) 460-7084.

Saturday, February 16, 2008

USA Homecoming Day

More information will be available as the events near.

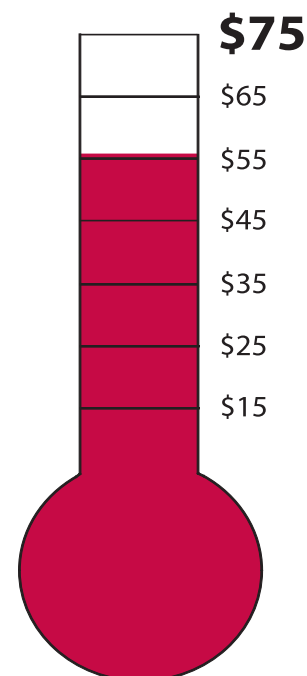
Impressive Numbers for USA Athletics

- 104** Sun Belt Conference Championships
- 54** NCAA Team Appearances
- 114** Individual NCAA Appearances
- 48** Times USA has hosted the Sun Belt Conference Championships
- 61** Sun Belt Conference Coach of the Year Awards
- 74** All Americans
- 4** Individual NCAA National Champions
- 51** Student Athletes Competing at NCAA National Championships
- 10** Vic Bubas Awards - Sun Belt Conference Top Program
- 92** Professional Baseball Signees
- 15** Jag Players to Play in the Major Leagues



Campaign Progress

Gifts in Millions



As of September 1, 2007

Working with You

Dr. Joseph F. Busta, Jr.
Vice President for Development
and Alumni Relations

Tracy Coleman
Associate Director, Medical Development

Kim Culbreth
Development Specialist, College of Continuing
Education and College of Education

Ann Cunningham
Associate Director, Children's and Women's
Hospital Development

Cassandra Commings
Development Specialist, Children's and
Women's Hospital Development

Melissa Dickinson
Assistant Director, Annual Giving

John Goodroe
Assistant Athletic Director, Development

Travis Grantham
Director, Medical Development
and Alumni Relations

Lisa Kavanagh
Associate Director, Alumni Relations

Carol Kittrell
Director, Alumni Relations

Abbie McCullough
Assistant Director, Medical Development

Amanda Pearman
Membership Specialist, Alumni Relations

Kim Peterson
Director, Development Services

Lauren Roebuck
Development Specialist, College of Engineering
and Mitchell College of Business

Melodie Robinson
Assistant Director, College of Medicine
Alumni Relations

Ben Samel
Director, Leadership Gifts and Gift Planning

Beth Schiavoni
Campaign Coordinator

Kristyn Sifford
Development Specialist, College of Nursing
and College of Allied Health

Ginny Turner
Director, University Development

Dr. Lois Wims
Associate Dean, College of Arts and Sciences
Development

Contacting Us

University of South Alabama
Office of Development and
Alumni Relations
Health Services Building,
Suite 2150
Mobile, Alabama 36688

(251) 460-7032

<http://www.southalabama.edu/development>

Opportunities to *Give*

Private support is critical to future success of the University of South Alabama (USA). There are many ways to make philanthropic gifts to USA. Gifts can be restricted gifts to any department, college, or program, or you can choose to make unrestricted gifts to the University to be used “Where the Need is Greatest” at the President’s discretion.

A charitable gift to the University of South Alabama can take many forms:

Cash or securities—make the most immediately useable gifts to USA. All gifts of cash or securities can be designated for any purpose you choose.

Corporate matching gifts—many companies encourage their employees’ philanthropy by matching, doubling, or tripling the employee’s gift. If you work for a matching gift company, just send your employer’s matching gift form with your gift, and USA will take care of the details. Both you and your company will be recognized for the matching gift.

Bequest through a will or living trust—many donors find a bequest the most convenient way to leave a legacy to USA.

Charitable trust or other life income plan—various trust arrangements such as charitable remainder unitrusts, charitable remainder annuity trusts, and charitable lead trusts may enable you simultaneously to make a gift to the University, retain income from the assets, and secure a tax advantage.

Gifts of real and personal property—your gift of real estate, works of art, collectibles, rare books, copyrights, and oil and gas interests may be sold and the proceeds endowed or used for capital or operating funds. Gifts of useable scientific equipment or computers may go immediately into the classroom or research laboratory.

Gift with funds that are returned to you or passed to your loved ones—you can make a gift of cash or other assets through an arrangement that will provide USA with annual gifts over a specified period and then pass the gift principal to your heirs or have it returned to you. These creative gift plans offer valuable income, as well as gift and estate tax savings, depending upon which type you choose.

IRA’s and qualified retirement plans—because these assets may be subject to heavy taxation when passed to your heirs, they are wonderful assets to consider using for charitable giving. Your gift can be made simply by designating USA as a beneficiary of your retirement plan. If, however, you meet the minimum age for withdrawals and would benefit from a deduction to use against your current taxes, you might also consider a lifetime distribution to USA. Due to the dynamic nature of the law, you should consult your tax advisor prior to making such a gift.

Life insurance—a life insurance policy that is no longer needed can be donated during your lifetime to support your favorite University program. Such a gift offers you income and estate tax savings. USA can also be named as a beneficiary of a new or existing policy.



Leadership

 University of South Alabama

 Office of Development

 Health Services Bldg., Suite 2150

 307 University Blvd., N.

 Mobile, Alabama 36688-0002

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