SAMPLE LANGUAGE FOR BEQUESTS

Specific Amount
“I bequeath to the Colorado School of Mines Foundation, Incorporated, of Golden, Colorado, the sum of ___ dollars ($__).”

Percentage of Estate
“I bequeath to the Colorado School of Mines Foundation, Incorporated, of Golden, Colorado, ___% of my adjusted gross estate as finally determined for federal estate tax purposes.”

Residuary Estate
“I devise and bequeath the residue of the property owned by me at my death, real and personal and wherever situate, to the Colorado School of Mines Foundation, Incorporated, of Golden, Colorado.”

Please contact us for assistance if you wish to designate your bequest for a specific purpose.

Join Us.
If you would like to include Colorado School of Mines in your estate plans, please let us know so that we can ensure that your intentions are properly understood and documented. Our goal is to use every gift exactly as the donor intended. We would be pleased to welcome you into the Heritage Society, providing you with all of the benefits of membership.

Contact Us.
Mines’ planned giving staff are experts in charitable gift planning and are ready to assist you as you consider how to fulfill your philanthropic goals. We are happy to provide you with sample language for including a bequest to Mines in your will or to discuss life income giving options that might be of interest to you.

Marianne Barker
Senior Director, Gift Planning
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Create a Lasting Legacy

Colorado School of Mines is honored to have extraordinary people who have the foresight and dedication to include the university in their estate plans. The Heritage Society serves as a way to recognize their loyalty to Mines and inspire generosity in others.

Members’ commitments include life income gifts and bequests through a will or trust, retirement plan or life insurance. We invite Heritage Society members to stay up-to-date on the latest happenings on campus through special events and our semi-annual newsletter.

Your lasting contribution bolsters Mines’ long-term success in solving the world’s biggest earth, energy and environmental challenges. Your commitment also help make a Mines’ education accessible for generations to come.

Heritage Society members Forest and Olivia Bommarito met at Mines where they earned their BS and ME degrees in petroleum engineering in the same years (2003 and 2005, respectively). Forest and Olivia set a great example for future Mines’ supporters and alums.

They consistently support Mines at a generous level every year through the President’s Council. They established the Bommarito Endowed Scholarship Fund in 2012 to provide financial support to undergraduate petroleum engineering students. Their estate gifts will add to their scholarship fund. As members of the Heritage Society, they provide inspiration to those who are considering putting Mines in their will.

“Mines is where our relationship began, and we wanted to ensure it was incorporated into our long-term financial plans. This was another way, in addition to creating the endowed scholarship, that we could provide support to future Mines students.”
Philanthropic Impact

Although neither Raynelle nor Ben Kuckel attended Mines, their philanthropic passions have led them to co-found, along with Raynelle’s mother, the Herbert Z. Stuart Memorial Endowed Scholarship in memory of Raynelle’s father, a 1963 Mines graduate. The scholarship was renamed upon the death of Raynelle’s mother to honor both of Raynelle’s parents.

“My dad was extremely pleased that he could attend Mines and was enthusiastic about Mines. There were no scholarships when my dad was there,” Raynelle says. “If he were here, he would say he’d had the best education possible. We’re very pleased to provide opportunities for Mines students.”

Ben adds, “Raynelle’s parents had a sincere appreciation of the impact Mines had on their lives, and the scholarship fund is a testimonial of our love for them.”

The couple is philanthropic in many areas, particularly the arts, land preservation and environmental causes, and, of course, higher education. Not only does the couple provide ongoing annual support, the Kuckels also are members of the Mines Heritage Society for having included the university in their estate plans.

WE CAN HELP YOU WITH THE FOLLOWING TYPES OF GIFT ARRANGEMENTS:

- Charitable bequests and retirement plan designations to make a gift toward Mines’ future needs
- Gifts of appreciated property—securities or real estate—to maximize your philanthropic impact and current tax benefits
- Gifts that pay income and provide current tax benefits
- Retained life estate gifts to make a tax-deductible gift of your home or vacation home while retaining the right to live in it
- Gifts of family business interests to unlock accumulated value and facilitate tax-efficient transfer to new owners
- Charitable lead trust gifts to create charitable and family legacies with funds that would otherwise be consumed by estate taxes
Creativity Fuels Giving Back

For many Mines graduates, the right brain doesn't get worked as much as the left. For Tim Bartshe '71 '73, his studies in the geology department helped engage and challenge the more creative side of his brain, and led to a fulfilling career.

"Having a photographic memory, an active imagination and being able to visualize things - geology is perfect. It is a discipline that is ready-made for my God-given talents," said Bartshe.

Before he found geology, Bartshe earned a bachelor’s degree in mining. He wasn’t captivated by the subject matter of his first degree, so when he decided to stay at Mines two more years to work on advanced ROTC curriculum, he began working on a geology degree. Looking back, he realizes that the decision to continue his studies in geology changed the trajectory (and happiness quotient) of his life.

Bartshe worked in industry for several years after graduating and then became a prospect generator consultant.

With his unique skill set, he was able to visualize and evaluate what was happening 8,000 feet under the surface. His creative instincts led him to success in that sector.

As a consultant, Bartshe had an opportunity to work in Indonesia for three years on a project that was one of the most fun things he had done in a work environment.

"My employers basically gave me free reign to review all of the collected data and evaluate the south Sumatra basin. Using information from paleontology, micro paleontology, seismic logs, and sample work, I was able to put it all together in a big picture." That result was honed by years of experience, a sound educational background from Mines and his creative mind.

Now, retired and enjoying trips around the world, Bartshe supports the geology department in several ways:

* Endowed fund supports thesis-related expenses of geology graduate students
* Current gifts provide more funding for students
* Post-lifetime IRA gift will support the endowed fund