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BALL STATE UNIVERSITY FOUNDATION
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Fold in half and tape shut.



Use This Language

To easily make a planned gift to Ball State University, simply add this paragraph to your will and fill in the details.

I give to the Ball State University Foundation, a not-for-profit corporation organized under the laws of the state of Indiana and located in Muncie, Indiana, (choose one)

- _____% of my estate or
- the sum of \$ _____ or
- all my right, title, and interest in the following described property:

- or
- all the rest, residue, and remainder of my estate to be used in such manner as the board of directors of said foundation shall, in its sole discretion, determine.

The Perfect Way to Honor Someone You Love

If you have a friend or family member whose life has been touched by Ball State University, consider making a gift to us in his or her name. When you memorialize some of the most important people in your life—such as your mother, father, spouse, mentors, or other special loved ones—as part of a gift to Ball State, you:

- honor that special person;
- support our academic mission; and
- possibly receive personal financial benefits.

You Have Choices

Three basic methods are available for establishing an honorary gift:

A gift today—An outright gift can help fund our immediate needs or an upcoming project. The financial benefits include an income tax deduction and the possible elimination of capital gains tax.

A gift through your estate plan—You can include a gift in your will or living trust, stating that a specific asset, certain dollar amount, or percentage of your estate will pass to us at your death in honor of your loved one.

A gift that lives on forever—Honorary endowments can be made now or through your estate plan. Endowments are structured so that a small portion of your gift, rather than the whole amount, is used each year to fund a particular purpose. The majority of the fund always remains intact and is invested for the future.



We're Here to Help
Making an honorary gift is a wonderful way to acknowledge someone's vision for the future. Contact D. Mark Helmus at 765-285-8312 or dmhelmus@bsu.edu to learn more about ways to recognize your honoree.



Beneficence Society
The Beneficence Society, established in 1995, recognizes alumni and friends who generously make a future commitment to the Ball State University Foundation through a bequest or other planned gift. For more information on planned giving and special recognition at Ball State, visit bsu.edu/giving.

We thank and welcome the following new member of the Beneficence Society:

Steve Broadwater



2800 W. Bethel Ave.
Muncie, IN 47304

Phone: 765-285-8312
Toll free: 888-1-GO-4-BSU
Fax: 765-285-7060
D. Mark Helmus

bsu.mylegacygift.org



How Will You Make a Difference?

There are many good-hearted people, all sharing a desire to leave the world a little bit better than they found it. We spotlight just such a person in this issue of *Beneficence*. James Barnes, '79, is a mentor and a motivator focused on helping disadvantaged youth—and in the future—through endowed scholarships at Ball State. How will you make a difference? As James says, you don't have to be a millionaire. We can show you some ways of making a difference at Ball State. Give us a call.

READ INSIDE how you can remember a special loved one with a tribute gift named in their honor.



**From Mentor to Motivator
Alum Enlightens Prospective Students**

With so many worthwhile organizations out there, you may wonder which one would benefit most from a bequest in your will or trust. For Indianapolis resident James Barnes, '79, several life experiences led him to an easy decision.

"What better place than Ball State?" says Barnes, whose college experience helped shape his future and inspired him to include Ball State as part of his legacy.

Barnes transferred to Ball State at the start of his junior year and graduated with a degree in industrial arts education from Teachers College. He taught industrial arts for two years at Merle Sidener Gifted Academy in Indianapolis before moving to manufacturing, where he worked with AES Interconnects. In 1995, he founded Jim Barnes Inc. (JBI) as a manufacturers' representative. He also found time to become a mentor.

All of these experiences led Barnes to support Ball State, where he found a
Continued on inside



James Barnes, with friend Solange Cordeiro, at the Indianapolis Art Center opening. His sculptures won Best of 3-D Mixed Media/ Sculpture and will be gifted to Hope Academy, a Fairbanks Hospital Charter School.

From Mentor to Motivator

Continued from front



You don't have to be a millionaire to start a scholarship fund. It's easy to set up an endowment fund with Ball State.

—James Barnes

way to include his various areas of interest to create scholarships in both the Department of Technology and the College of Architecture and Planning.

Philanthropy Forged Through Strong Relationships

Barnes has remained close to a few of his professors and is particularly grateful for the support of Olon Dotson, associate professor of architecture. "Professor Dotson has been supportive of my interest in mentoring students, always making time to help me out when I bring potential students to campus for tours," he says. "Together, we show these students an inside perspective of Ball State."

Barnes also contributed to the Dr. William H. Middleton Scholarship, which resulted in a friendship with the Middleton family and sparked his own interest in giving back. "I saw what a positive effect this gift had on continuing 'Doc' Middleton's legacy at Ball State," he says. "I was inspired."

Motivating Young Minds

It's clear that Barnes' background as an educator helped shape his service accomplishments and, in turn, his philanthropic direction. About 20 years ago, he joined Big Brothers Big Sisters as a mentor. He worked with many children but ultimately wanted to extend his outreach to college-bound students.

"I really wanted to work with youth who had a good possibility of going to college," he says. "I thought with my background and training, and my connections in the field of manufacturing, I could help expose students to diverse opportunities."

The result was his partnership with the Starfish Initiative, a college readiness mentorship program for academically promising, economically disadvantaged high school students in Marion County, Indiana.

Barnes has used his work with Starfish to introduce his mentees to different jobs and careers, letting them explore their interests in

preparation for their post-high school years. In addition to visits to Ball State, he takes them to local manufacturers and design firms.

He also shares his love of sculpting and working with his hands. When Barnes and his mentees aren't seeing plays or visiting art galleries, they work together on art projects. He's presently working on a metal sculpture for Starfish with his current mentee, who will attend Ball State this fall.

But funding scholarships to help students and mentoring wasn't enough. Barnes' endowments focus on the need for increased diversity in technical fields.

"I wanted to focus on minorities interested in technology and architecture, especially young women, because there's just not that many females who apply in these areas," he says. "I was hoping that scholarships earmarked for women would influence more of them to pursue these fields and contribute professionally."

Thanks to his love of Ball State, Barnes has been able to make that gift a reality. Although his scholarships won't be funded until after his lifetime, he will continue to make additional gifts in the meantime.

—Shelia-Marie Stacy, Communications Graduate Assistant



Make a Greater Impact

Follow your passion with a gift to the Ball State University Foundation. Contact D. Mark Helmus at 765-285-8312 or dmhelmus@bsu.edu for details.



A Scholarship Is Born

What sparks your interest, and how can that lead you on the path to creating your own legacy that will allow future Cardinals to fly?

When this issue's featured donor, James Barnes, '79, combined his love of Ball State, mentoring minority youth, and the study of technology and architecture, the Barnes Family Scholarship was born. Future students studying technology education and architecture at Ball State will benefit from his meaningful planned gift.

If your path leads you to consider a planned gift, you will find that it's a simple yet significant way to make a lasting impact on your areas of interest. Once you have provided for your loved ones, a planned gift can satisfy both your philanthropic and tax goals.

You will find a wealth of information on how your gift can benefit students, colleges, faculty, programs, facilities, and athletics at Ball State in the new "Passion and Impact" section of our website at bsu.edu/foundation.

Visit the "Giving and Engagement" section to explore the many options and personal benefits in giving back to Ball State through your time, talent, and treasure.

Our personal interests and passions lead us down our own distinctive paths. If you'd like to discuss your hopes and dreams for Ball State, please contact me directly at no obligation. You may also share your unique Ball State story by completing the form included in this newsletter.

We look forward to hearing from you!



D. Mark Helmus

Senior Vice President for Development
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dmhelmus@bsu.edu

Prepare for the Future—Yours and Ours

Thank you for your feedback!

Please send me the free guide *Estate Planning Starters* so I can learn about creating or updating my estate plan.

I want to learn more about gift planning options available to support Ball State because it has been important in my life. Please contact me to discuss the possibilities.

I have included the Ball State University Foundation in my estate plan but haven't yet notified you. My gift is in honor of

Name Relationship

I am interested in making the following happen at Ball State through my gift:

If you prefer to email your story, please write to dlmay@bsu.edu.

Name (Please print.)

Telephone Email

Address

City, State ZIP

We respect your privacy. Information collected here will not be shared outside of our organization without your permission.



Create a Plan for the Future

Learn how you can create your estate plan—or update an existing one—with the FREE guide *Estate Planning Starters*. Send for your copy using the attached reply card today.