

# THE RISING TIDE

FALL 2011

PLANNED GIVING OPPORTUNITIES FOR PEPPERDINE FRIENDS AND ALUMNI

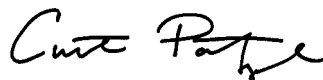
*Dear Pepperdine friends and alumni:*

In this issue of *The Rising Tide*, you will read about Charles and Amy Jo Runnels and their incredible work with young leaders through the annual Youth Citizenship Seminar at Pepperdine. Charlie and Amy Jo have generously supported Pepperdine students for over 40 years with their time, talent, and treasure. We honor their longstanding and unwavering commitment to Pepperdine's mission to strengthen students for lives of purpose, service, and leadership. We hope their story inspires and motivates you as it does us.

In this issue, you will also learn about one component of The Pepperdine Plan—the Charitable Gift Annuity (CGA). Did you know that Pepperdine offers annuities at rates significantly higher than those you'll find in the commercial marketplace? A CGA is a wonderful tool for increasing income, reducing risk, minimizing taxes, and helping deserving Pepperdine students!

As always, thank you so much for your support and encouragement. Please know that you are a blessing to Pepperdine students and the surrounding family of faculty, staff, alumni, and friends.

Sincerely,



CURT A. PORTZEL

*Executive Director*

*Center for Estate and Gift Planning*

## THE PEPPERDINE PLAN: CHARITABLE GIFT ANNUITIES

### INSIDE

- ↘ Working for Students:  
Charlie and Amy Jo Runnels
- ↘ The Pepperdine Plan  
Explained
- ↘ New Heritage Society  
Members



## WORKING FOR STUDENTS: CHARLIE AND AMY JO RUNNELS



CHARLIE AND AMY JO  
RUNNELS

**D**r. Charles B. Runnels, or Charlie as he is known by friends, has been instrumental in Pepperdine's growth from a small Christian college, originally located at 79th and Vermont in South Los Angeles, to the global university it is today.

Charlie assisted with the move to Malibu, raising hundreds of millions of dollars for the University and creating programs that continue to help youth become great leaders. Just as importantly, he and his wife Amy Jo have added to Pepperdine's success by giving of their own finances to create an

*"I hope to encourage all students to dream the impossible dream."*

—Charlie Runnels

endowed scholarship to benefit Pepperdine students.

The Youth Citizen Seminar (YCS) is one of Charlie's many Pepperdine legacies. YCS is a one-week, no-cost conference held on the Malibu campus each summer for high school seniors. The students must be nominated by their principal and demonstrate leadership attributes. The purpose of the program is to make students better leaders through hearing from well-known speakers including Ben Stein, George Foreman, Dennis Prager, and Tommy Lasorda.

When asked what he hoped to achieve through his work, Charlie said, "I hope to encourage all students to dream the impossible dream." Even in retirement, Charlie continues to demonstrate his commitment to the future success of Pepperdine students.



ASHLEY McCANN

**S**enior media production major at Seaver College, Ashley McCann was once a student of Charlie's YCS program. She is now working hard toward her goal of producing television shows and documentaries that bring awareness to Obsessive Compulsive Disorder and related mental illnesses. She aims to help people better understand these mental disorders so they can support those afflicted.

Ashley grew up in Simi Valley, California, and dreamed of attending Pepperdine since she saw a picture of the campus in 4th grade.

Ashley shares, "I can't thank those enough who have donated towards student scholarships. Because of their generosity, I was able to study abroad and enhance my education of the world, furthering my sense of self and understanding of my own beliefs."

# THE PEPPERDINE PLAN EXPLAINED: CHARITABLE GIFT ANNUITY (CGA)

## Higher Returns

If you are still invested in the stock market and are nearing retirement or already retired, the last few years may have you asking, "How do I get off the stock market roller coaster, protect my money, and still earn a decent return?" You may have been encouraged to invest in government securities, but treasuries and other fixed income assets, including CDs and money market funds, are currently providing dismal returns.

There's a solution to secure higher returns while mitigating your risk: the Charitable Gift Annuity (CGA).

## How a CGA Can Help You

A Pepperdine CGA can provide fixed income for the rest of your life while at the same time helping you fulfill your charitable goals.

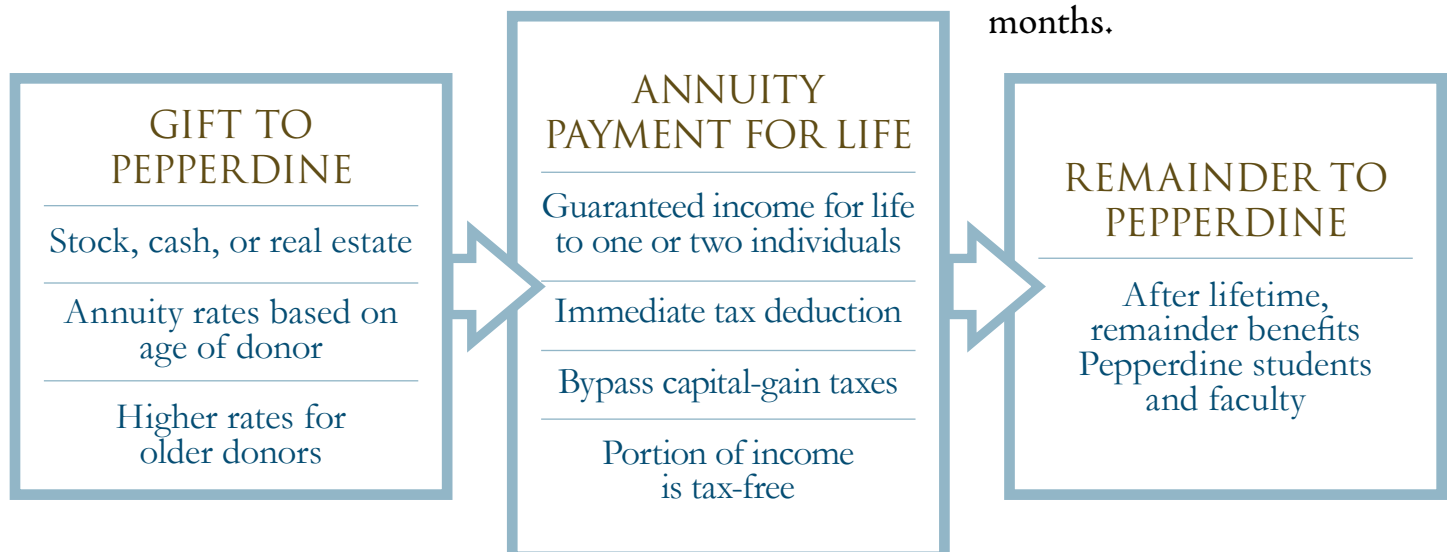
With a CGA, your income is guaranteed by the full faith and credit of Pepperdine University. Your fixed annuity payment does not fluctuate with the market.

The majority of the income you receive from Pepperdine will be tax-free and you receive a charitable income tax deduction. You can also designate the purpose of your gift within the University, e.g., student scholarships, athletics, or the arts.

## Establishing a CGA

The flowchart below provides a preliminary explanation of how a CGA works. We would love to speak with you more about this opportunity! Call our office (toll free: 855-659-5746), and we will determine your annuity payment, the amount of your tax-free income, and your charitable income tax deduction.

If you are pleased with the proposed annuity payment, the next step is to transfer a gift of stock, cash, or real estate to Pepperdine and enter into a contract with Pepperdine stating that the University is obligated to pay you a fixed annual income for the rest of your life. You will start receiving your annuity payments within one to three months.



# New Heritage Society Members

*We honor friends who have recently made  
planned gifts to Pepperdine University.*

Asako and Tom (JD '05, MBA '05) Caldwell  
Rod and Sandra Campbell  
Sally and Bart (MBA '76) Hackley  
Jolyn ('02) and Seth ('02) Hays  
Liz and Keith (JD '97) Hinkle  
Jane and Bob Jackson  
Emily ('97) and Jason ('95, JD '03) Jarvis  
Lovie Lee (MS '76)  
Jean McCrady  
Michael Menichetti (BSM '04, MBA '07)  
Ann Morales

Giuseppe Nespoli ('04)  
Nancy (MBA '03) and David Padberg  
Susan and Mark Peckham  
Karen and Ray Rayburn  
Helen Reagan  
Marilyn Reilly ('56)  
James Swaniger (MA '96)  
Brian Thomason  
Megan and Paul ('91) Wilkes  
Betty Yeow ('65)  
Judy and James Zierick

For more information about estate gifts, charitable remainder trusts, and charitable gift annuities, or for a confidential personalized proposal, please contact:

## Center for Estate and Gift Planning

24255 Pacific Coast Highway  
Malibu, CA 90263-4893

Phone: 310.506.4893

Toll Free: 855.659.5746

[curt.portzel@pepperdine.edu](mailto:curt.portzel@pepperdine.edu)

[www.pepgift.org](http://www.pepgift.org)



Stephanie C. Buckley  
Associate Vice Chancellor

Curt A. Portzel ('92)  
Executive Director

Thomas F. Caldwell (JD '05, MBA '05)  
Planned Giving Officer and Legal Counsel