Giving Back in Tandem

By Devon BARRETT

F or the Laura I. and Clifford H. Haka Endowment, endowed by the Laura I. and Clifford H. Haka, was an important part of Cliff and Sue Haka’s bequest to MSU. The Haka Endowment supports MSU’s slate of endowed scholarships and student support funds throughout the College of Business.

Cliff and Sue Haka are part of Team MSU, a group of donors who have given to MSU and whose giving is based on their personal wealth and/or their ability to give. Their giving includes gifts from their lifetime and through their estate. For the Haka Endowment, the Hakas included a bequest to MSU in their personal estate plans. The Haka Endowment is a testament to the Hakas’ commitment to MSU and their desire to support its mission.

Cliff and Sue Haka, part of Team MSU, are committed to giving back.

Every Spartan Needs an Estate Plan

Estate planning is for everyone, regardless of age or assets, because estate planning can be about more than leaving your estate to your spouse, children, or other loved ones. Estate planning can also be about planning for your retirement, your health, and your legacy.

Cliff and Sue Haka’s gift to MSU through their estate plans allows them to support the university and its mission after they are gone. Their gift plan also allows them to support MSU’s mission while they are alive.

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Giving Back in Tandem

By Dave BARRETT

H ead of the College of Business at Michigan State University, Cliff and Sue Haka are part of Team MSU since 1982, and consider MSU to be their alma mater. Cliff and Sue have endowed the Turfgrass Information Center (TIC) with $2.5 million to recognize the vision and generosity of Cliff's mentor, Barber W. Greenlee, and to establish the Susan F. and Clifford H. Haka Endowment in the College of Business and the Eli Broad College of Education. The endowment is dedicated to support graduate education and professional development in the area of accounting. Cliff and Sue hope that students will use the endowment to further their education and prepare for the field of accounting and business. The endowment is also used to support the Eli Broad College of Education by providing scholarships and support for faculty development. The endowment also supports the MSU Libraries, and is dedicated to support the Turfgrass Information Center (TIC) and the Eli Broad College of Education.

For the past three years, Cliff and Sue have been actively involved in the College of Business and the Eli Broad College of Education. They have been actively involved in the College of Business and the Eli Broad College of Education by providing scholarships and support for faculty development. The endowment is also used to support the Eli Broad College of Education by providing scholarships and support for faculty development. The endowment also supports the MSU Libraries, and is dedicated to support the Turfgrass Information Center (TIC) and the Eli Broad College of Education.

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Every Spartan Needs an Estate Plan

Estate planning is the process of preparing for the future. When creating your estate plan, consider including a gift to Michigan State University. As you are deciding on how to provide for the people and causes you care about, consider a charitable gift. Charitable gifts provide you with the opportunity to support your favorite cause while also having the potential to receive tax benefits. By making a charitable gift, you can help ensure that the people and causes you care about will continue to receive support.

To learn more about the Michigan State University Estate Planning Program, visit giftplanning.msu.edu or call the Office of Gift Planning at 517-432-1000.

Everyone in Michigan State University has the opportunity to support the university through a charitable gift. By making a charitable gift, you can help ensure that the people and causes you care about will continue to receive support.

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TEAM MSU GIVES in record-breaking, Big Ten-topping fashion

D espite a dramatic increase in the number of gifts to higher education institutions across the country, Michigan State University continues to lead its Big Ten peers in fundraising success. Enrollment in MSU’s annual giving program has increased by more than 60 percent during the past five years, and the university’s fiscal year-end total of $96 million is the highest reported by the Big Ten and fourth highest of all American Association of Universities (AAU) institutions.

For the third year in a row, MSU’s faculty, staff, and retirees are among the most generous in the country. Gifts to MSU from this group of nearly 82,000 people were the fiscal year’s nearly $62 million—twice the previous MSU record, which was the highest reported by the Big Ten and fourth highest reported by the American Association of Universities (AAU). Fiscal year 2014 closed out a dramatic fiscal year as June 30, 2014, officially determines the most recent year-end giving campaign that includes a campaign page of 15 billion.

The numbers, of course, are gifts in-kind and event gifts from MSU faculty, staff, and retirees to MSU and are not part of the annual report page. But many faculty members also volunteer their time and expertise to the advancement efforts of the university, including the MSU College of Animal Science. Although they are not included in the official annual giving campaign, they are critical members of the broader community of alumni and friends. For us, understanding fundraising success really reflects MSU’s goal of empowering every student and every faculty member to be a leader in their professional contributions every day. They’re both working to create a positive learning environment—out the commitment to their cause doesn’t end when they leave the university. MSU is as much a community destination for current and former faculty and staff as it is for students. It’s official. MSU faculty, staff, and retirees are among the top five most generous donors in the country. This is a community and we give back because that’s who we are as a donor of a community.

Since the day we arrived at MSU, we have never felt anything but welcome—as both students and faculty members. ‘Since the day we arrived at MSU, we have never felt anything but welcome’—Ms. Montgomery

But Val hasn’t completely hung up her lab coat. Her desire to help others never-ending. “Since the day we arrived at MSU, we have never felt anything but welcome—both as students and faculty members. We’re both working to create a positive learning environment—out the commitment to their cause doesn’t end when they leave the
campus. MSU is as much a community destination for current and former faculty and staf

After 26 years, Valerie Montgomery may be stepping down from her position as president of the Council for Aid to Education (AAE). But through her leadership and with the support of her spouse Mark Montgomery, her legacy will be forever etched in the university.

Val and Mark have been incredibly generous and their efforts are an example to others. Their generosity is a testament to the importance of creating a supportive, enriching environment for the next generation of students. It’s something that is important to the office. MSU is as much a community as MSU is as much a community destination for current and former faculty and staff as it is for students. It’s official. MSU faculty, staff, and retirees are among the top five most generous donors in the country. This is a community and we give back because that’s who we are as a donor of a community.

We wanted to pay back MSU for helping me obtain my degree and giving me a place to have a fulfilling career. ‘We wanted to pay back MSU’—Ms. Montgomery

RANKING OF EMPLOYEE GIVING • BIG TEN*

| #1 MICHIGAN STATE UNIVERSITY | Rankings University
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NEW ANNUAL GIVING LEVELS LEADERSHIP CIRCLE

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LOYALTY LEVELS (5 years or more)

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<tr>
<th>Level</th>
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<tr>
<td>President</td>
<td>$100,000-$249,999</td>
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Thank you for your support. We are grateful for your continued support.

THANKS FOR GIVING

*The above data is based on results from the 2015/2016 giving campaign. A total of 23,929 faculty and staff members gave to MSU, and this includes both annual and cumulative giving.

WHAT HAPPENS TO RETIREMENT ASSETS AFTER YOU'RE GONE?

Surely you have heard the phrase “You can take it with you, but you can’t take it when you’re gone.” What happens to retirement assets is a topic often omitted from conversations with family and friends. Retirement assets may be the largest portion of your overall estate. To prevent this, consider leaving your loved ones non-taxable assets instead of leaving assets in your retirement accounts. And, if charitable giving is a part of your goals, plan to maximize the incentive given by your university, adding long-term growth to your planned giving.

How does charitable giving work? We begin with a charitable gift, which benefits the charity and the donor alike. To learn more, contact the Office of Gift Planning at (517) 884-1000 or giftplanning.msu.edu.
**EXTENDING TEAM MSU GIVES: THREE WAYS TO GIVE**

Dмonstrating the critical role of giving in the success of educational institutions, and recently providing a $250,000 gift to the College of Education, the Edward J. Petry Endowment for graduate fellowships, the Graduate School and director of the Graduate School and director of the Student Food Bank. Through their giving, they are ensuring that students have the financial freedom to pursue their goals, regardless of financial circumstances.

Since the day we arrived at MSU, we have never felt anything but welcome—as both students and alumni. So, our unprecedented support to the College of Education, the Educational Administration and recently providing a $250,000 gift to the College of Education, the Graduate School and director of the Graduate School and director of the Student Food Bank. Through their giving, they are ensuring that students have the financial freedom to pursue their goals, regardless of financial circumstances.

**THANKS FOR GIVING**

**NEW ANNUAL GIVING LEVELS**

<table>
<thead>
<tr>
<th>LEADERSHIP CIRCLE</th>
<th>2023-24 PROPERTY FUND</th>
<th>2024-25 PROPERTY FUND</th>
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<td>$120,000-$499,999</td>
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**LOYALTY LEVELS**

- **GRAND ADVISOR** (GAD) $100,000-$249,999
- **SCHOLAR OF ACHIEVEMENT** (SAA) $250,000-$499,999
- **SCHOLAR OF PROSPERITY** (SPO) $500,000-$999,999
- **SCHOLAR OF EXCELLENCE** (SXE) $1,000,000-$9,999,999
- **SCHOLAR OF EMPOWERMENT** (SME) $10,000,000 or more

Learn more: giftplan@msu.edu, or visit giftplanning.msu.edu
What happens to retirement assets after you’re gone?

Did you know that the value of your retirement account may be subject to federal and state estate taxes? And when? At your death? When you withdraw from your account? And, when you contribute to your account. And, at your retirement? And, at your death? And, in your lifetime?

To prevent this, consider leaving your loved one two federally based assets—restitution funds as well as replacement funds in your retirement account. And, at your retirement? And, at your death? And, in your lifetime?

The value of both assets is based on the value of the account at the time of your death.

Learn more at the Office of Gift Planning at (517) 353-5399 or giftplan@msu.edu.
Giving Back in Tandem

By Dave BARRETT

H

The decision of the Haka Endowment, MSU’s largest fund, to name the Turfgrass Information Center (TIC) in honor of Cliff Haka, a former professor and researcher who died in 2015, is part of the larger story of a couple who have given back to their alma mater in myriad ways.

Cliff and Sue Haka, part of Team MSU since 1982, take a his, hers, and ours approach to giving back. They have both donated to MSU and are members of the Eli Broad College of Business’s Barack Obama, John Boehner, and Linda E. Landon giving societies, and helped many others by donating to their alma mater.

The first time they gave was in the early 1990s, when Cliff was a professor in the Eli Broad College of Business. In academia, Cliff and Sue were provided with stipends as a faculty member and a student, respectively. But they also knew that they could do more to help MSU and its students.

Relying on their experience and knowledge, they decided to give back to MSU in a way that would benefit the university and its students. They knew that by giving back, they could help ensure the future of education and research at MSU.

As they worked their way into the world of MSU’s leadership, they realized that they could make a difference in the lives of students and faculty. They were committed to ensuring that the university remained strong and innovative, and that its students received the best possible education.

So they did.

Their contributions have been significant, helping to create opportunities for students, faculty, and the broader MSU community. They have supported programs that have transformed the university and its impact on society.

Every Spartan Needs an Estate Plan

Estate planning is the process of transferring your assets and property to another person or entity after your death. It is an important part of your financial plan and can help ensure that your wishes are carried out after you are gone.

Estate planning is especially important because it can help ensure that your assets are distributed according to your wishes, and can help protect your family and your estate from potential tax liabilities.

When creating your estate plan, it is important to consider the following:

1. Will: A will is a legal document that outlines how you want your assets to be distributed after your death. It is important to have a will in place to ensure that your assets are distributed according to your wishes.

2. Trusts: Trusts are legal documents that give you control over how your assets are distributed after your death. They can be used to protect your assets from creditors, and can help reduce the amount of taxes your heirs will have to pay.

3. Power of Attorney: A power of attorney is a legal document that allows you to appoint someone to act on your behalf if you become incapacitated or unable to make decisions for yourself.

4. Living Will: A living will is a legal document that outlines your wishes for medical treatment if you become incapacitated or unable to make decisions for yourself.

5. Beneficiary Designations: Beneficiary designations are used to designate who will receive your assets after your death. They are used for both retirement accounts and life insurance policies.

6. Executor: An executor is a person who is responsible for carrying out the terms of your will. It is important to choose someone who is reliable and responsible to serve as your executor.

Estate planning is a complex process that requires careful consideration of your assets, your family, and your wishes. It is important to consult with a trusted professional to ensure that your estate plan is properly drafted and executed.

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