



GEORGE W. BUSH
PRESIDENTIAL CENTER

A FINANCIAL, ESTATE, AND GIFT PLANNING NEWSLETTER

FALL 2020

Freedom Hall SOCIETY NEWSLETTER



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Supporting Education in Perpetuity

Cheryl and Steve Coke both attended Southern Methodist University, but it took working at a summer camp in Minnesota for them to meet. They have been together ever since, going on 52 years of marriage.

Steve met Mrs. Bush during his time at SMU, and he later met President Bush through events in Dallas. When President and Mrs. Bush returned to Dallas, they reconnected and learned about the meaningful work of the Bush Center. Cheryl and Steve believe every child has the ability to learn and knew that the Bush Center could make a difference by providing help to those most in need.

Among other factors, Cheryl and Steve claim "their age" as the deciding factor to make an estate gift. Since Steve, as a Dallas attorney, has done a considerable amount of estate planning in his profession, he was familiar with the emotions behind these decisions.

"One reaches a stage of life where you realize that your opportunity to make an impact on the lives of others is timely



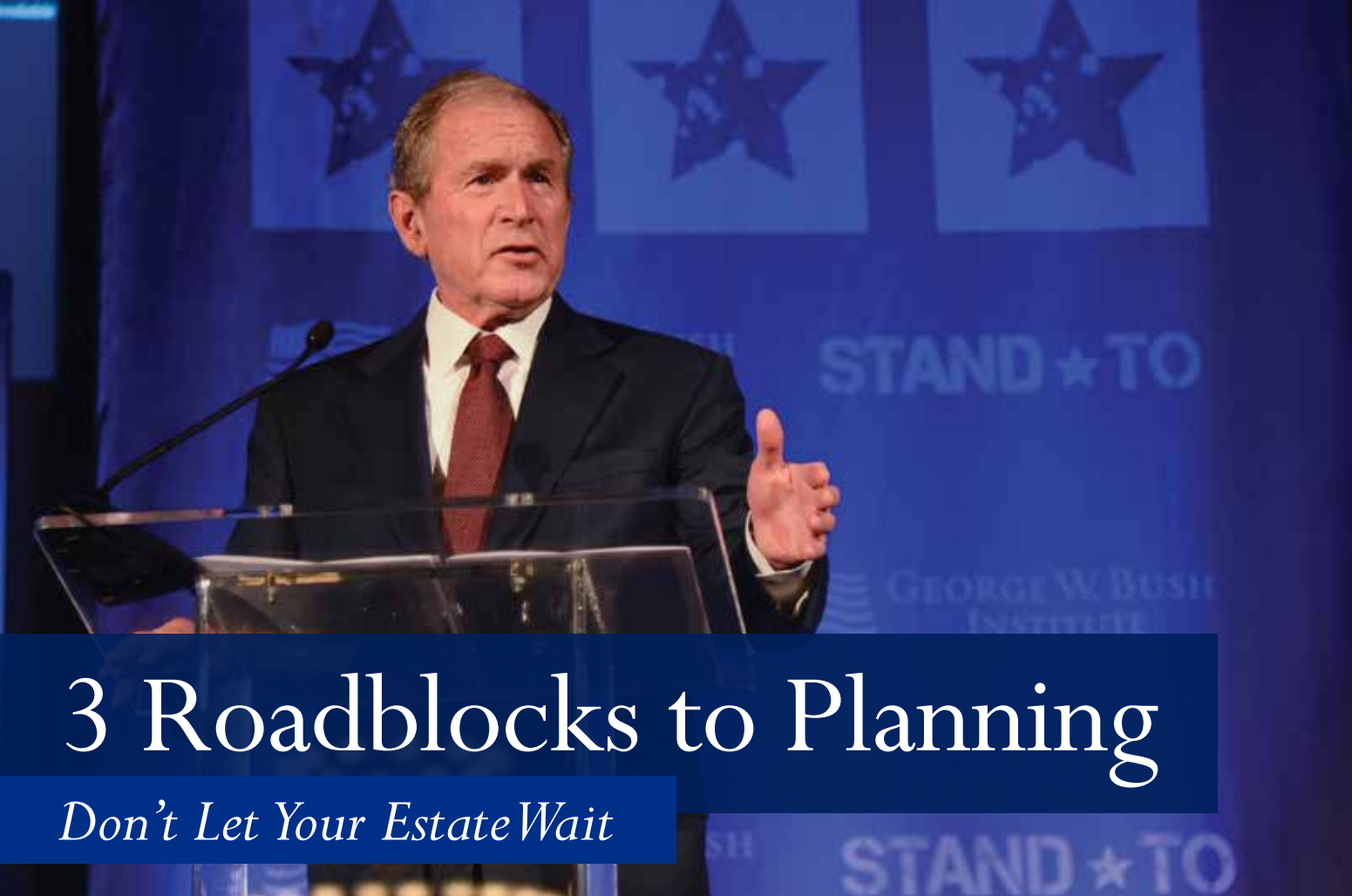
Cheryl and Steve Coke

and of paramount importance. Leaving perpetual gifts to worthy charitable organizations for the educational benefit of others is an effective and gratifying act for us both. The Bush Center is such a worthy charitable organization."

Cheryl and Steve value the Bush Center's work in education, and they knew that by making a planned gift, they could make a lasting impact on children's lives.



Like Cheryl and Steve, you can leave a legacy that extends the values you share with President and Mrs. Bush. Contact Dee Rindt at the Bush Center at Donorservices@bushcenter.org or 214.200.4384 to learn more.



3 Roadblocks to Planning

Don't Let Your Estate Wait

It can be challenging to prioritize preparation, especially when it feels like so much around us is changing. Let's consider some obstacles to estate planning and how to overcome them.

Roadblock: I don't want to think about it. Of course you don't. It can be uncomfortable to consider—even as the topic has become more top of mind amidst the challenging uncertainties of this year.

Rethink It: Create space to reflect and make arrangements in advance, on your own time. Remember that your estate plan is really a gift to your loved ones. Being prepared benefits them in a difficult time.

Roadblock: It's too complicated and time-consuming. Yes, estate planning takes effort. For expert advice, consult with an estate planning attorney and financial advisor. It's also helpful to organize documents and outline goals before these meetings.

Rethink It: Consider the sense of accomplishment and peace of mind you'll have knowing your wishes will be fulfilled.

Roadblock: I don't want to make decisions I might have to change later. Any plan is better than no plan. During your lifetime you can change your mind and make updates as needed.

Rethink It: Make sure you have control over your estate and can provide instructions for its use.

Leave the Legacy You Intend

If you don't do it, who will? Without a plan, you risk leaving a burden for your loved ones. Take the compassionate steps now to be prepared—for yourself and those who matter most to you.

We Can Help

To learn more about how to be charitable through your estate plan, please contact Dee Rindt at the Bush Center at Donorservices@bushcenter.org or 214.200.4384.

Gifts That Keep On Giving

Leave a Legacy That Matters

When we talk about estate planning and leaving a legacy, we usually focus solely on final arrangements and finances. But those don't tell your whole story. Reflect on the values you want to pass down to future generations, and how you might answer these questions for your family and friends.

Meaningful Memories: What are things you want your loved ones to know? How would you like to pass on this information?

- *Audio / video recordings and messages* preserve the oral tradition of storytelling.
- *Handwritten letters, journals, and photo captions* make your records feel more personal. Your loved ones will treasure your voice and handwriting.
- *Create a file* where you can collect the personal materials you'd like to share, along with the necessary legal and financial documents.

Charitable Giving: What are the issues that matter to you? How can you extend your support beyond your lifetime?

- *Percentages in your will or beneficiary designations* keep charitable giving as a proportion of your estate, so you can support your loved ones and organizations like the Bush Center.
- *Your donor advised fund* can provide current and future giving options, so you can decide what you would like to give now versus later.



How Do You Want to Be Remembered?



Our FREE resource, **7 Questions to Help Build Your Legacy**, is more than just a worksheet. It's a time capsule—and a gift. Return the enclosed reply form or contact Dee Rindt at the Bush Center at Donorservices@bushcenter.org or 214.200.4384 to request your copy today.

Recipe

Ingredients:

3 cups flour
1 tablespoon baking powder
1 tablespoon baking soda
1 tablespoon ground cinnamon
1 teaspoon salt
1 1/2 cups butter, room temperature
1 1/2 cups sugar
1 1/2 cups light brown sugar, packed
3 large eggs
1 tablespoon vanilla extract
3 cups semisweet chocolate chips
3 cups old-fashioned rolled oats
2 cups sweetened flaked coconut
2 cups chopped pecans

Part of Mrs. Bush's legacy?

Mrs. Bush's Cowboy Cookies!

Directions:

1. Preheat oven to 350 degrees. Line two baking sheets with parchment paper.
2. In a large bowl, combine the flour, baking powder, baking soda, cinnamon, and salt.
3. Using a stand mixer on medium speed, beat butter until smooth and creamy, about 1 minute. Gradually add sugars and beat to combine, about 2 minutes. Add eggs, one at a time, beating for 1 minute after each one. Then add the vanilla extract.
4. Reduce speed to low, add flour mixture gradually until just combined.
5. Add chocolate chips, oats, coconut, and pecans, mixing until just combined.
6. For each cookie, drop 1/4 cup of dough onto parchment lined baking sheets, spacing 3 inches apart. Bake for 17 to 20 minutes, until edges are lightly browned; rotate sheets halfway through.
7. Remove cookies from oven, and let the cookies cool on baking sheet for about 5 minutes, then transfer to a rack to cool completely.

Prep Time: 20 minutes
Cook Time: 20 minutes
Servings: 24 cookies



The Bush Institute's Team 43: "A Greater Purpose"

Air Force Retired Master Sergeant Joshua Caron served as a critical care medic and aeromedical evacuation medic in Iraq, Afghanistan, and the Horn of Africa from 1997 to 2014. He was diagnosed with post-traumatic stress and a traumatic brain injury in 2009. Here, Josh Caron shares his story on how Team 43 awakened him to a greater purpose.

I became a member of Team 43 in the fall of 2016, which happened to be my first semester of law school. I finished that first semester in the middle of the pack, an average student. The truth is, I was leaning on my diagnosis as an excuse not to perform better.

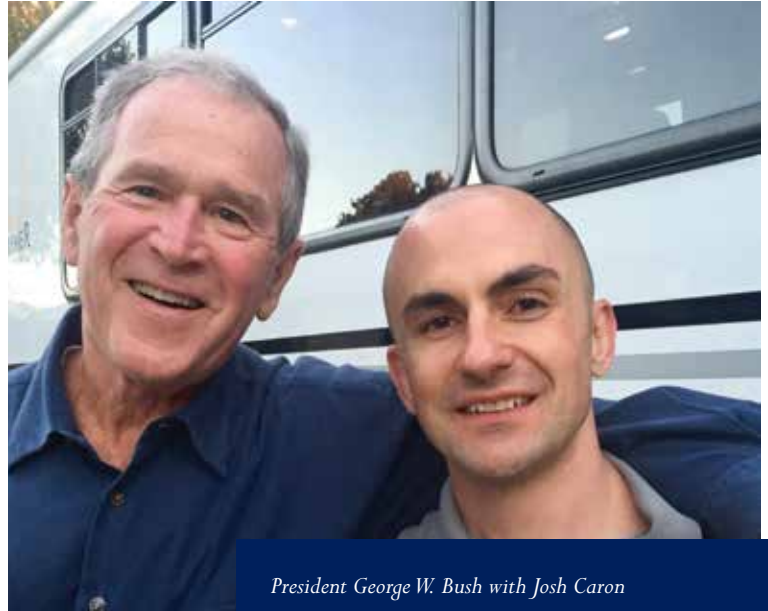
Being a part of Team 43 and being associated with such an extraordinary group of individuals awakened me to a greater purpose. I no longer used my diagnosis as an excuse or to feed the stigma that surrounds veterans experiencing post-traumatic stress (PTS). With the support and encouragement of Team 43 and my family, I graduated in the top 20% of my class and am now a disability rights attorney.

This is what Team 43 has done for me. I could not have endured the rigors of law school without my teammates as examples or their support. Team 43 is not a mountain biking group, but a peer network of some of the greatest, most resilient and talented people our nation has to offer.

President and Mrs. Bush's tireless efforts and dedication to serving veterans and bringing awareness to the invisible wounds of war is changing lives. President Bush sees our potential to become community leaders and utilize our platform to bring about awareness, research, and education. Through the Bush Center's programs, veterans are trained, educated, or simply motivated by those around them to achieve more and to refuse to let their disabilities define them.




GEORGE W. BUSH
PRESIDENTIAL CENTER



President George W. Bush with Josh Caron
2016 Warrior 100K bike rider

The ripple effect and continued impact of the Team 43 legacy will carry on far longer than any one of us individually. President Bush's efforts and those of the amazing staff at the Military Service Initiative are truly making communities better.

 **To learn more about Josh**, please visit www.bushcenter.org/people/joshua-caron.html. Return the enclosed reply form to send a note of encouragement to Josh and his fellow Team 43 members, and to learn more about how a gift in your estate plan can help develop the next generation of leaders.

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