



PI KAPPA ALPHA
ALPHA ZETA CHAPTER



ALPHA ZETA ALUMNI ASSOCIATION

Alpha Zeta Chapter
Pi Kappa Alpha Fraternity

P.O. Box 7818
Little Rock, AR 72217



STATUS REPORT: PIKE HOUSE CONSTRUCTION

Brothers and Friends of AZ Chapter:

We are pleased to report that the design phase of the Pike House Project has been completed and that demolition and reconstruction is set to begin on or about July 1st. When this project is finished, it will have no peer on the University of Arkansas campus. And, to your credit, it will be owned by the fraternity and not the University. Pike will be one of the few fraternities that can make that statement and will be the only one with a brand new, world class facility located in a choice spot on Arkansas Avenue.

We hope to have the project completed with students back in residence by the fall semester of 2012. We are installing a plaque at the entrance in easy view to all who come to live in or to visit the Pi Kappa Alpha House. It will read:

THE PRIVATELY OWNED PIKA HOUSE

Although this property is under the authority of the U of A, this project was privately developed, funded and built through the hard work and generosity of the brothers and friends of Alpha Zeta Chapter of Pi Kappa Alpha.

Enjoy your time here.
Develop your full potential here.
Go from here to make a difference in your
chosen field, your state and your country.
Serve the common good.
Cherish and protect this facility.
Leaved it for your future brothers in as good
of shape as you found it.
In the bonds of phi phi k a.

The words on this plaque clearly reflect what those working on and contributing to this project feel about it. The bonds of our fraternity run deep and last a lifetime, don't they?

As you may know, we have not yet reached the goal of our Alumni Capital Campaign, but we are within reach. Hopefully, this will be our last appeal to you to become a stakeholder in the new Pike House Project. We urge you to make a commitment now, a donation, a pledge or an increase of a previous donation. This project is going to happen, big time, under budget and on time. Surely you will want to be a player. There are several ways to participate, some with significant tax advantages to you. These include:

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1. If your situation dictates or permits your donation to be in cash, we can arrange for you to make a pledge and then spread the payments over 3 to 5 years. If you are in the maximum income tax brackets and live in Arkansas, each \$1.00 donated will save you 40 cents in taxes. Thus, your “net gift” will only be 60% of each dollar, or 60 cents. Simple as that. LET THE IRS PAY A PORTION OF YOUR DONATION!!!
2. If you have securities (publically traded stocks, bonds, mutual funds) that have appreciated dramatically, you can make a gift of those securities and deduct the full fair current market value from your income taxes, the same as if it were a cash gift. In addition to the deduction, a gift of appreciated securities avoids paying income taxes on the unrealized gain in those securities. (Got Wal-Mart stock, anyone?) Interesting, huh?
3. The same opportunity for appreciated securities is available if you have other property, including real estate, that has unrealized gain (i.e. the fair market value of the property exceeds its income tax basis) with certain limitations. If you have such property, we can discuss with you the issues related to that type of gift. We will work with your tax advisor to get you the maximum benefit of such a gift. Wow. This could turn into something big!!!!
4. Personal use tangible personal property (autos, boats, art, jewelry, antiques, etc.) can also be given with a tax deduction generally available at the gift's fair market value on the date of the gift. Special rules apply in certain cases that need to be considered if you have a potential gift of this type. Again, we will be glad to discuss with your tax advisor the benefits and limitations of gifts of this nature with your tax advisor. Hmmm.
5. For those brothers 70.5 years and older, we have yet another gift program which ends on December 31 of this year. You may direct your IRA trustee to make a direct gift from your IRA (other than SEP IRA or SIMPLE IRA accounts) without you incurring income tax liability for the distribution! Otherwise, such mandatory distributions are normally taxed as ordinary income. With this gifting technique, you may give any amount up to \$100K and such distributions are NOT included as ordinary income.

Enclosed (or attached if electronic) are forms and instruction for utilization of the five gifting opportunities set out above. As always, we suggest that you consult your own tax advisor and then choose the gifting technique that is most advantageous for you. BUT, we also urge you to seriously consider exercising one or more of these techniques ASAP in order that you, too, can become a STAKEHOLDER in the magnificent new Pike House. And, by the way, we also accept “in kind donations” of goods and/or services if that is an option that you wish to explore and discuss.

In the bonds,

Bill Brady, Project Chairman
David Love, Chairman, Ways and Means

Mac Hogan, Vice Chairman
Michael Cooper, Monticello Corporation

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PI KAPPA ALPHA HOUSE MAKEOVER PROJECT

Strategic Marketing Plan

I. PROJECT: The chapter house for Alpha Zeta Chapter of Pi Kappa Alpha Fraternity at the University of Arkansas, located at 320 Arkansas Avenue in Fayetteville, Arkansas, was built in the early 1950's and has been the college residence of nearly 2,000 young men over a span of seven decades. At age 70+, the Pike House is in much need of a 21st century makeover. The legal entity that controls and manages the house is the Monticello Corporation (MC). Its board of directors has worked closely with the leadership of the Alpha Zeta Alumni Association (AZAA) to bring the much needed expansion and renovation project to fruition, within budget and within a reasonable time frame. When completed, the facility will be the largest Greek house on campus, by far, and it will offer the finest amenities and technology available to ANY living group on campus. The project is scheduled to begin on or around July 1, 2011, and is expected to be completed and ready for student occupancy for the fall semester in 2012.

II. DESIGN: The MC has engaged the Tulsa based architecture, engineering and construction firm of CYNTERGY, AEC, to prepare a comprehensive design for a "new" Pike House, one that will meet the approval of the University's Design Review Board (DRB) and the MC/AZAA. An important DRB requirement was that the overall modernistic "look" of the Pike House be retained by preserving key architectural elements of the original (current) house as designed by John G. Williams, the first dean of the U of A School of Architecture. CYNTERGY and the MC have worked closely with the DRB and a dynamic design that meets the DRB requirements has been developed and approved by all concerned. When built, this design will make the Pike House the Crown Jewel of the U of A Greek System and will serve the chapter and the fraternity for decades to come. (Note: The CEO of CYNTERGY is an alumnus of AZ Chapter of PiKA.)

III. COST: Obviously, the cost of this project, if done correctly, is something that has been of great interest and concern to both the MC and the AZAA. Cost estimates have ranged from \$4 million to \$5.5 million during the various design phases undertaken. The appropriate leadership entities of the MC and the AZAA have now decided on a final plan, one that is expected to cost approximately \$5.0 million. Half of this amount will have to be raised in a capital campaign directed at AZ alumni. The other half will be borrowed from appropriate lending sources. It should be noted that the current scope of this project does not currently include the proposed

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two-level, multi-use parking deck at the rear of the house. That portion of the site will be prepped to allow the construction of a parking deck at a later date, unless a significantly large donation for that purpose is obtained now.

IV. HOUSE: The design of the new house will have a huge “wow factor” from several angles. It will be the newest, most unique Greek house on campus. It will also be the largest Greek House on campus at 28,000 square feet. It will have three floors of all-suite student rooms, featuring four-man suites, each with two bedrooms, a study/leisure room and two bathrooms. These accommodations are something that no other U of A living group, and especially any other fraternity house, can boast. These three floors will offer 54 premium student beds. The basement or ground floor level will have, in addition to the Chapter Room and concession area, eight two-man “economy rooms” that will likely be reserved for high grade point students, chapter officers or scholarship students. The MC has been extremely careful to insist upon a design that is both practical and competitive. Pike will have a significant edge in all aspects of Rush and recruitment for many, many years to come with this new house.

V. “WAYS AND MEANS”: The MC designated alum Bill Brady of Little Rock as General Project Chairman in February for the total makeover project. Brady’s first action was to select and appoint a Ways and Means Committee, whose responsibility is to find “the ways and the means” to fully finance this project by raising an additional \$1.2 million before the end of August, 2011. David Love of Hot Springs has been designated as Chairman of that committee. The W&M committee consists of: George Westmoreland (Rogers), Tommy Boyer (Amarillo and Fayetteville), Gary George (Springdale), Steve Stafford (Green Forrest), Bill May (Little Rock), Curley Combs (Springdale), Don Gibson (Fayetteville), Jared Henderson (Dallas) and Rep. Jon Woods (Springdale). These men are at work seeing to it that the \$1.2 million by 8/31 becomes a reality. The other half of the \$5 million price tag will come in the form of loans from various sources, as previously noted.

VI. SPECIFICS of W&M: 192 AZ alums have contributed, donated or pledged a total of \$1,225,000 as of May 1, 2011. Excluding the three largest donors, the average donation/pledge is \$4,300 per person. The total amount raised to date and the average per donor are both excellent numbers; but the number of those alums participating out of over 1200 is woefully inadequate and disappointing. One goal of the W&M Committee is to raise that number of participants while maintaining the very fine average per donor. Another goal of the committee is to identify and locate at least a dozen individuals who are financially capable of donating five and even six figures

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if they are properly motivated. Special efforts will be made to engage these individuals in various gifting techniques that are available, including “matching challenges”, and by providing various tax incentive driven opportunities to participate at the higher levels. Naming opportunities will be available to those donating at or above the six figure level.

VII. CONSTRUCTION: The MC has contracted with the construction company FLINTCO Constructive Solutions, whose Arkansas office is located in Springdale, to be the general contractor on the project. The fraternity will have actual construction management and oversight of the project through both CYNTERGY and a Construction Management & Oversight Committee (CM&O) that is composed of Pike alums with expertise and experience in the construction industry. This particular committee is composed of: David Chapman, Chairman (Springdale), Bruce Colclasure (Little Rock), Cope Gracy (Fayetteville), Mark Middleton (Little Rock), Tommie Wood (Fayetteville) and Bob Herndon, AIA (Littleton, CO). This committee will be the fraternity’s eyes and ears on site regarding all phases of construction; and it will ensure that the new Pike House is being constructed to the highest standards with the highest quality and the most cost effective materials, fixtures and equipment. Ken Hirshey, CEO of CYNTERGY, will be wearing his “Pike Hat” and be participating in this aspect of the project with this committee.

VIII. AMENITIES: Amenities are said to include: furniture, fixtures, equipment, decorative items, beds, lamps, chairs, kitchen equipment, doors, windows, etc. These amenities will have to be procured in order to complete the project in the manner and fashion decided upon by the MC and the AZAA. A committee for that purpose, Procurement and Special Projects, chaired by Bob Goff (Little Rock) has been appointed to manage that particular aspect of the project. That committee is composed of: Dennis Curtis (Cabot), Shelby Woods, Little Rock), Bill Stovall (Charleston, SC), Bob Dawson (Fort Smith), Gary Lay (Little Rock), Bruce Wesson (Little Rock), Randy Bynum (Little Rock), David Gruenwald (Little Rock), Phil Pascoe (Demascus) and Herschel Bowman (Sherwood). This committee has two main functions: Extraordinary fundraising efforts (challenges, pledge matching, solicitation of non-alumni special groups, etc.) and Solicitation of “in-kind donations”, such as flooring, building materials, HV/AC equipment, lumber, landscaping, concrete, paint/painting, windows, doors, lighting, kitchen equipment and any number of other such items or services.

IX. PLAN: All of the above describes a very dynamic and ambitious project, one that would vault the Pike Chapter in Fayetteville over the top of the competitive ladder among fraternities at the University of Arkansas. The site of the house is perfect. It will be located at our familiar 320 Arkansas Avenue which is just off of Dickson Street near the University’s designated East En-

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trance. The design is truly outstanding, some might say breathtaking, and will truly set the Pike house above and apart from all other Greek houses on campus. The question that remains is how is it going to be paid for?

X. MECHANICS OF RAISING \$2.5 MILLION EXPLAINED: Fundraising is a numbers game, and the current numbers are extremely encouraging. 192 AZ men have made pledges and/or donations that range from \$25 to \$250,000 as of May 9, 2011. Excluding the Top Three pledges, which total an impressive \$400,000, the average donation from the remaining 189 men is \$4,300 mentioned in section VI above. Reaching the overall goal of \$2.5 million from alumni donations will be accomplished by the following:

- The PiKA goal is raise an additional \$750,000 from 10 – 12 men who have not made a commitment to date, or who will increase their pledge amount due to the strength of the project and its lasting impact on the U of A campus landscape. Several Key Major Donor Prospects have expressed that they want to see evidence that the project is going to be brought to fruition as planned before they commit. This is fairly typical and not unexpected. Based on all of the above, the W&M Committee will now be soliciting those individuals who have indicated a willingness to be a major donor. That segment of the capital campaign is critical to its success.
- PiKA's next big push has been designed to achieve 25% pledge/donation participation. There are 1,351 living alumni for which current addresses are available. A 25% participation level will mean that 337 potential donors are on board. The additional 145 men, at the average of \$4,300 each, will produce \$623,000, rounded to \$625,000 in additional donations. A 25% pledge/donation participation is achievable and is expected to be attained before the end of July, 2011.
- If you take the \$1,225,000 already raised plus the \$750,000 anticipated from Key Major Donors, plus the \$625,000 from the push to 25% you will see that the outcome is \$2,600,000!!! That's right guys, it is right there, within reach, if all who can will!

Donation or gifting time is now. The Monticello Corporation (which is composed of Alpha Zeta alums) will sign contracts and plan to build only what it can afford on or around July 1. If you like what you have read (herein) and seen (in the DVD), surely you want to participate and be on board and proudly in the 25% group, rather than the 75%, who surely are going to “feel kind of funny” once the project is over and completed and everyone is proclaiming how wonderful it is. The MC/AZAA has lined up financing for the balance of the project costs. It needs your support and financial assistance right now in order to successfully complete the alumni capital campaign.

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All loyal Pikes, recalling what PiKA has meant to them over the years since they left the “U”, will hopefully:

1. VIEW and study, really study, the enclosed DVD. The virtual walkthrough of the NEW house is a real eye opener and is most impressive. Don't miss it.
2. MAKE a donation decision, soon, if not already. If already deciding on a donation, consider increasing it. Study the various gifting techniques that are available, some offering significant tax advantages. If circumstances do not allow financial participation, know that the MC and the AZAA thanks all of its alums for their interest and consideration. One good non-financial method of participation is to simply CALL (or e-mail) five buddies and encourage them to participate. Talk it up. Friends asking friends, brothers asking brothers, to consider the merits of the project is what will bring this campaign home and make it happen.
3. USE one or more of the enclosed forms to indicate the strength and amount of your support. Make a pledge, or a donation, and challenge five other guys, maybe your pledge brothers, to do likewise. As a good, loyal Pike, you are, without any doubt better than “average”. You may want to use the “average” of \$4,300 as your “floor” or your starting point and move up the scale from there. Be loyal. Be with AZ.

The men of PiKA, past, present and future are going to be proud, really proud, of the new Pike House in Fayetteville. It is going to be an outstanding tribute to those brothers who have dug deep and worked hard to bring this project to fruition. The final question, for now is: “Do you want to be a part of the winning team, the 25% that gave or not?” The guys who are working on this project, especially the members of the various committees, WOULDN'T MISS IT FOR THE WORLD. And neither should you, Brother!

Regards and in the bonds,

William B. Brady, '60, Project Chairman

MASTER DONOR LIST AS OF MAY 10, 2011

Year	Name	Last Name	Year	Name	Last Name
1940	David E. Fitton Jr.	Fitton	1960	Fred R. Stuckey	Stuckey
1946	James K. Fraser	Fraser	1961	Byron A. Adams	Adams
1946	Blake W. Schultz	Schultz	1961	Herschel A. Bowman Jr.	Bowman
1947	John F. Brewer Jr.	Brewer	1961	Robert L. Cargile	Cargile
1948	Maj. Gen. James L. Gardner Jr.	Gardner	1961	Carl E. Combs	Combs
1949	William B. Kirk	Kirk	1961	Courtney C. Crouch Jr.	Crouch
1949	James M. Park Jr	Park	1961	Maurice E. Little Jr.	Little
1950	Joseph K. Ely	Ely	1961	Shelby V. Woods	Woods
1950	James H. Faulkner	Faulkner	1962	Richard A. Goff	Goff
1950	O. B. Holiman	Holiman	1962	Robert M. Goff Jr.	Goff
1950	Joe Pete McNeil	McNeil	1962	Robert L. Neighbors	Neighbors
1950	Gilbert S. Stacy MD	Stacy	1962	Ted H. Sanders	Sanders
1950	James R. Tate	Tate	1962	Bruce E. Wesson	Wesson
1951	Vincent S. Lovoi	Lovoi	1962	Cozie D. Wilhite	Wilhite
1952	G. Wayne Clark	Clark	1963	James H. Bane	Bane
1952	Toney G. Reynolds, DVM	Reynolds	1963	John D. Rice	Rice
1952	Jim P. Spradley	Spradley	1964	James F. Arnold II	Arnold
1953	John F. Cross	Cross	1964	Jean J. Gardenhire Jr.	Gardenhire
1953	James C. Foster	Foster	1964	William M. Hogan	Hogan
1953	John P. Hvasta Jr.	Hvasta	1964	John H. McCalla	McCalla
1953	John P. Hvasta Jr.	Hvasta	1964	Theodore D. Siepmann	Siepmann
1954	Samuel W. Anderson	Anderson	1964	George W. Westmoreland	Westmoreland
1954	Reece L. Crow Jr.	Crow	1965	W. Roger Atkins	Atkins
1954	George L. Keeter	Keeter	1965	David R. Chapman	Chapman
1955	James H. Findley	Findley	1965	J. Royston Gathings	Gathings
1955	Robert E. Ritchie II	Ritchie	1965	David R. Sandlin	Sandlin
1956	James D. Coe	Coe	1965	Dennis D. Shaw	Shaw
1956	Dale Green Jr.	Green	1965	Eddie L. Warrington	Warrington
1956	James R. Mulkey Jr.	Mulkey	1966	William B. Carwell	Carwell
1957	Robert T. Dawson	Dawson	1966	Clarence W. Dill III, DDS	Dill
1957	Robert H. French	French	1966	Donald L. Gibson	Gibson
1957	David A. Mulkey, M.D.	Mulkey	1966	Gary W. Lay	Lay
1957	Donald E. Wray	Wray	1966	Don W. Walker	Walker
1958	Billy B. May	May	1967	David R. Evans	Evans
1958	Phillip T. Pascoe	Pascoe	1967	N. Stanford Williams	Williams
1958	Jerry C. Perciful	Perciful	1968	Robert A. Balkman	Balkman
1958	Norvell E. West	West	1968	James W. Berkowitz	Berkowitz
1959	Jerry M. Dollins	Dollins	1968	J. Brant Croxdale	Croxdale
1959	Robert L. Fincher, M.D.	Fincher	1968	Gary M. Karnes	Karnes
1959	Lynn J. Forrest	Forrest	1968	William C. Rankin Jr.	Rankin
1959	Bruce E. Fullerton	Fullerton	1969	David R. Allmendinger	Allmendinger
1959	David F. Gruenewald	Gruenewald	1969	Dennis R. Curtis	Curtis
1959	John H. McElroy	McElroy	1969	G. Leigh McLaughlin	McLaughlin
1959	John W. Peters	Peters	1969	Thomas W. Nickels	Nickels
1959	James H. Poynter Jr.	Poynter	1969	Joe W. Sharp	Sharp
1959	Thomas W. Rogers Jr.	Rogers	1969	William H. Stovall III	Stovall
1960	Douglas W. Ashcraft, DDS	Ashcraft	1971	Clayton H. Dark	Dark
1960	Thomas E. Boyer	Boyer	1971	Timothy V. Scott	Scott
1960	William B. Brady	Brady	1971	Hobson V. Smith	Smith
1960	James A. Capps Jr.	Capps	1972	James A. Due	Due
1960	George K. Coffman	Coffman	1972	Dennis H. Kellam	Kellam
1960	Larry P. Crain Sr.	Crain	1972	James B. Nowlin	Nowlin

Year	Name	Last Name	Year	Name	Last Name
1972	Joseph G. Ross	Ross	1993	Garrett C. Pettus	Pettus
1972	James J. Webb	Webb	2000	Anthony R. Burton	Burton
1973	C. Damon Kellam	Kellam	2000	W. Michael Cooper	Cooper
1973	Richard N. Watts	Watts	2000	Brad Dowler	Dowler
1975	Gregg A. Davis	Davis	2000	M. Brent Glover	Glover
1975	Robert C. Hayes	Hayes	2000	Dustin J. Graham	Graham
1975	Walter C. Hudson III	Hudson	2000	Jared K. Henderson	Henderson
1975	Richard P. McKinney	McKinney	2000	William A. Hill III	Hill
1975	Joe S. Moss	Moss	2000	M. Logan Kersey	Kersey
1975	Thomas F. Williams	Williams	2000	Jesse L. Powell	Powell
1976	C. Danny Fisher	Fisher	2000	Wesley B. Smith	Smith
1976	Brandon L. Huffman	Huffman	2000	Steven N. Snyder	Snyder
1976	Dr. William M. Munday	Munday	2000	Jonathan E. Woods	Woods
1976	Jackson R. Newsum	Newsum	2001	Gregory H. Fancher	Fancher
1976	John B. Vincent	Vincent	2001	L. Trent Lea	Lea
1977	Woody L. Smithey Jr., DDS	Smithey	2001	Christopher R. Meier	Meier
1978	John L. Bracken	Bracken	2001	Aaron R. Stahl	Stahl
1978	Randall L. Bynum	Bynum	2001	Shaun D. Swearingen	Swearingen
1978	Bradley E. Gray	Gray	2001	Michael R. Waggoner	Waggoner
1978	Kenneth L. Hirshey Jr.	Hirshey	2001	Michael A. Walton	Walton
1978	David S. Hooker	Hooker	2001	Jason B. Webb	Webb
1978	Allan W. Ranson	Ranson	2001	Christopher G. Weiser	Weiser
1978	Scott A. Smith	Smith	2001	Jeff Wood	Wood
1979	Ronald K. Steen	Steen	2002	Jeffrey A. Brooks	Brooks
1980	John D. Hooper	Hooper	2002	Clint Conner	Conner
1980	Brian F. Layman	Layman	2002	Nathan Garner	Garner
1981	Brad W. Brown	Brown	2002	J. Tyler Gill	Gill
1981	Robert L. Burns	Burns	2002	Benjamin J. Pierce	Pierce
1981	William W. Chiles Jr.	Chiles	2002	Adam J. Powell	Powell
1981	Randall C. Sanner	Sanner	2003	Scott W. Fretheim	Fretheim
1982	Dr. John G. Elders	Elders	2003	Daniel F. Hammack	Hammack
1982	Rich D. Robins	Robins	2003	Jared W. Wilkins	Wilkins
1982	Jeffery M. Stephens	Stephens	2004	Jeremy S. Bell	Bell
1982	Mark R. Vowell	Vowell	2004	Eric Brown	Brown
1983	Scott F. Dicus	Dicus	2005	Jaron W. McTee	McTee
1983	Jeffrey H. Dixon	Dixon	2006	Jonathan P. Bednar II	Bednar
1983	Eric B. Taylor	Taylor			
1984	Richard E. Schultz	Schultz			
1986	Heath A. Ward	Ward			
1987	Scott E. Malm	Malm			
1988	David M. Franz	Franz			
1988	Steven B. Meldrum	Meldrum			
1990	Tommie G. Wood	Wood			
1990	Wade Chessman	Chessman			
1991	J. Lincoln Darrow	Darrow			
1991	Christopher C. Tennison	Tennison			
1991	Wesley W. Woods	Woods			
1991	R. Steve Zimmermann	Zimmermann			
1992	Devon R. Ballard	Ballard			
1992	Matthew A. Jones	Jones			
1993	Michael-Sean D. Castleberry	Castleberry			
1993	R. Aaron Hutchison	Hutchison			

CASH GIVING FORM



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Thank you very much for giving to the house project at the UofA.
It is only through your generosity the project will be realized.
Please enter your information:

Name: _____

Address: _____

City/St/Zip: _____

Ph: Work/Home/Cell: _____

Email: _____

Yr Initiated: _____ Yr. Grad: _____

Cash giving is simple.

1. If your total contribution is less than \$25,000, please make your check out to the Alpha Zeta Alumni Association and mail it to the address above. We recommend that you keep a copy of the check and this form for your records.
2. If your total contribution is 25,000 or more, please send your check to the same address, but make it payable to PiKA Foundation, a 501 c 3 entity with Taxpayer ID 62-6039877. More info: 800-456-7452

If you are paying in installments, please list them below:

Inst. #1 _____ Date: _____

Inst. #2 _____ Date: _____

Inst. #3 _____ Date: _____

Please try and Include #1 with this form; reminders will be sent for the others. 5 Installments can be made over time, if necessary.

IRA DISTRIBUTION GIVING FORM



Alpha Zeta Alumni Association
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Thank you very much for giving to the house project at the UofA.

Please enter your information:

Name: _____

Address: _____

City/St/Zip: _____

Ph: Work/Home/Cell: _____

Email: _____

Yr Initiated: _____ Yr. Grad: _____

This year **ONLY**, those of you 70.5 yrs. of age or older have a unique opportunity to gift your Required Minimum Distribution (RMD) (or a greater amount up to \$100K) without having to pay ANY tax.

You can save up to 40% (state and federal) of any amount given, and simultaneously decrease your tax liability on future years' RMD!!! Please consider making your **TOTAL** gift this year, before this opportunity ends!

An IRA distribution is as simple as 1,2,3:

1. Consult with your tax advisor, or call or email Norvell West, and he will arrange to have a tax professional consult with you. Cell- 501-658-7666; Home-501-771-7666 norvell.west@sbcglobal.net
2. Have your broker figure your RMD, and complete the appropriate form for you.
3. Have your broker issue the distribution check in favor of the PiKA Foundation.

WHEN IN DOUBT, ASK!!!!

The check should be in favor of the PiKA Educational Foundation, a 501 c 3 entity with Taxpayer ID 62-6030877. Foundation number: 800-456-7452. Make a copy of the check and this form for your records and forward the check and a copy of this form to the Alum Assoc. at the above address. We will send the check to the foundation.

Gift Amount: _____ Date: _____

STOCK GIVING FORM



Alpha Zeta Alumni Association
PO Box 7818
Little Rock, AR 72217

Thank you very much for giving to the house project at the UofA.
Please enter your information:

Name: _____

Address: _____

City/St/Zip: _____

Ph: Work/Home/Cell: _____

Email: _____

Yr Initiated: _____ Yr. Grad: _____

Giving stock which has appreciated in value is as simple as 1,2,3:

1. Consult with your tax advisor, or email norvell.west@sbcglobal.net or call Norvell at 501-658-7666 (cell) or 501-771-7666 (home), and he will arrange to have a tax professional consult with you.
2. Remember that amounts of \$25K and higher are income tax deductible to the fullest extent allowed under the Internal Revenue Code.
3. Have your broker complete a "Charitable Gift Transfer Letter of Authorization" similar to the attached. The broker needs to enter the PiKA Foundation information as shown on the attached example. The transfer is automatic. Foundation number: 800-456-7452.

WHEN IN DOUBT, ASK!!!!

Please send a copy of this form to the Alum Assoc at the address above after entering the value of the contributed stocks below.

Value of Contributed Stock: _____

Date of Contribution: _____

Charitable Gift Transfer

Letter of Authorization

charles SCHWAB

• **Complete, sign and fax to: 1-877-824-3726, Attention: Outgoing Transfers.**

- Use this form to make charitable gift donations by transferring stocks, bonds and/or mutual funds from your Schwab account to an Individual or charitable organization account held at another financial institution.
- For donations to the Schwab Charitable Fund™ please use the form available at www.schwabcharitable.org.

1. Schwab Account Information

Schwab Account Number
Account Title/Registration

2. Securities to Be Transferred

Use the table below to designate securities to be transferred from the Schwab account listed above.

Name of Stock/Bond/Mutual Fund	Symbol/Ticker/CUSIP	Number of Shares to Be Transferred*	Purchase Date [†] (Optional)	Cost Basis [†] (Optional)

*Only whole share amounts are eligible for transfer. Fractional shares cannot be transferred. Shares cannot be specified in a dollar amount.

† Shares will be gifted based on a client's current cost basis method unless otherwise specified with a given purchase date and cost.

3. Transfer Instructions (If you are transferring mutual funds, please contact the receiving Institution to obtain delivery instructions.)

Charitable Organization or Individual Recipient Information:

Receiving Institution Account Number X53-009261	Account Title/Registration Pi Kappa Alpha Foundation
Contact Name at Charitable Organization or Name of Individual Recipient	Telephone Number
Mailing Address	City State Zip
Name of Receiving Institution National Financial Services Corporation	DTC Number (Required for Stock and Bond Transfers) DTC#0226

Your name will appear as the charitable gift donor unless you check the following box:

I wish for this gift to be anonymous.

4. Authorization to Transfer (All Account Holder signatures are required.)

Please accept this letter as authorization to irrevocably transfer the above listed security(ies) from my/our Schwab account to the designated individual or charitable organization listed above. Shares will be transferred in kind and are not to be liquidated.

Signature(s) and Date(s) Required

X

Account Holder Signature

Print Name

Date

X

Additional Account Holder Signature

Print Name

Date



NAMED GIFTING OPPORTUNITIES

1. New Second Floor With Memorabilia Displays (500K or 2 250K Donors): The new second floor over the living room and dining room will be for public use, and it will feature displays that honor significant AZ alumni. Memorabilia in various fields of endeavor (Athletics, Business Innovation, Politics/Government, Education, Military, Entertainment (more) and Eras (1904-1919, 1920's, 1930's, 1940's, 1950's, etc) will be displayed.

Memorabilia already committed or in hand:

Congressman "Took" Gathings' Bicentennial Medallion, from 1976

Jimmie Baker's 1939 Razorback Annual (5 Prime Time Emmy Awards)

Bud Canada political and sports donations, including Sports Hall of Fame trophy

Alton Baldwin sports and personal donations, including All Century Team items

Maj. Gen. James Gardner's dress uniform (27 Medals, incl #2,#3,#5,#6 for Valor)

Col. David Fitton's dress uniform (3 Legion of Merit; 24 total medals)

Bob Fabinski's pilot commission signed by President Nixon, plus items with White House emblems

C. Armitage Harper photos and books (Harper was awarded the French Medal of Honor and the US awarded him the Legion of Merit. Items donated by C. Armitage Harper, III, who is a retina surgeon in Austin, TX)

Tommy Boyer is donating Campaign For The 21st Century Chairman awards. The campaign raised 1 BILLION, 97 MILLION for the UA.

2. Entry Foyer with Atrium and Skywalk (250K): A 7' x 7' hand carved, hand stained glass crest, mounted on a massive base, will greet you as you enter the facility. PiKA will spend \$12,500 on this jaw dropping hunk of architectural glass, and that is before shipping and mounting costs. Feel free to check out the www.palaceofglass.com web site. Palace of Glass does ALL architectural glass for Las Vegas casinos. The entry will also feature a large giclee portrait of the Entry Foyer donor on the fireplace wall on the right. Finally, there will be a 28' atrium, with skywalk, to further make this area WOW.

3. New Front Lawn Patio (250K): A new patio will be built on the front lawn. The patio will run from the fireplace to the kitchen. The existing brick walls and ribbon windows that separate the old formal living room area and the dining room from the front lawn will be replaced with a wall featuring large picture windows. Every meal eaten will require the member to walk through this area. The openness and attractiveness of the patio will be seen many times each day. The patio will be highly functional as well. This will be a premium spot to both relax and socialize, weather permitting. The space is priced accordingly.

4. 4th floor, 3rd Floor and 2nd Floor (100K each): These will feature pods of suites, and the naming rights are priced accordingly. Each "pod" will consist of 3 former dorm rooms. The configuration will be bedroom with private bathroom for 2/common living & study area/bedroom with private bathroom for 2. No other living group- fraternity, sorority, or UA all suite dorms-comes close to matching these accommodations. The UA has built 4 all suite dorms since 2000, and PiKA's suites are larger in square footage AND feature 2 bathrooms per 4 occupants and not merely 1 bathroom for 4.

5. 1st Floor, Rooftop Garden, Dining Room, Housemother Apartment, Library, and Conference Room (50K each): The Dining Room and the Housemother Apartment are stand alone donation opportunities on the entry level floor. The Library and Conference Room areas on the new second floor of the public wing are exciting gifting opportunities, while the new Rooftop Garden will offer a direct view to Old Main during social events, or when members are just sunbathing and waiving at beautiful sorority women as they drive by the facility on warm spring afternoons.

6. Pods of Suites (25K Each Pod): Since each pod of suites has 3 rooms, it is fair to command 25K for naming rights, as noted previously. 25K puts the alumnus' name on a pod of suites that are larger than those offered by the UA in its most recently built (2007) all suite dorm complex, called Maple Hill. FOR THE NEXT 72 YEARS, OUR PODS WILL ALWAYS BE LARGER THAN THE PODS OFFERED BY THE UA. That is a less than \$350/year.

7. Community Donor Naming Opportunities:

a. Formal Living Room (10K) Goal 25, to raise 250K

b. Hand Carved Crest (5K) Goal 50, to raise 250K www.palaceofglass.com The architectural crest will cost \$12,500, fob California, as previously noted.

c. Community Donors will be displayed on the formal living room/crest plaque.

8. Sidewalk Patrons: In the tradition of the UA's Senior Walk, a new entry sidewalk will be poured, and names of all donors of 2.5K and higher will be cut into the new sidewalk for permanent display. Sidewalk Patrons will also be listed on the Master Donor Plaque. Permanent recognition in concrete for less than \$70 a year, for the next 72 years, is a bargain.

9. Named Donors: ALL \$1,000 and higher donors will be listed on the Master Donor Plaque, to be prominently displayed inside the facility.

DONOR RECOGNITIONS SUMMARY

Any donation of 5K or higher shall have 3 recognitions:

a. Sidewalk Patron- name in concrete

b. Master Donor Plaque

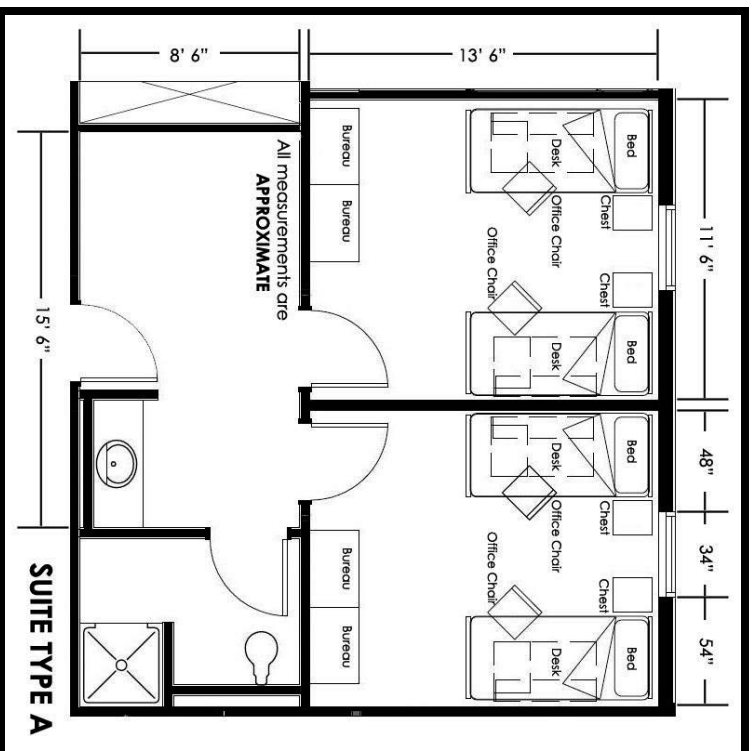
c. Specific Plaque for the room/space/item per the above donation schedule

Any donation of 2.5 K or higher receives 2 recognitions:

a. Sidewalk Patron

b. Master Donor Plaque

Any donation of 1K-2.5K will be listed on the Master Donor Plaque.

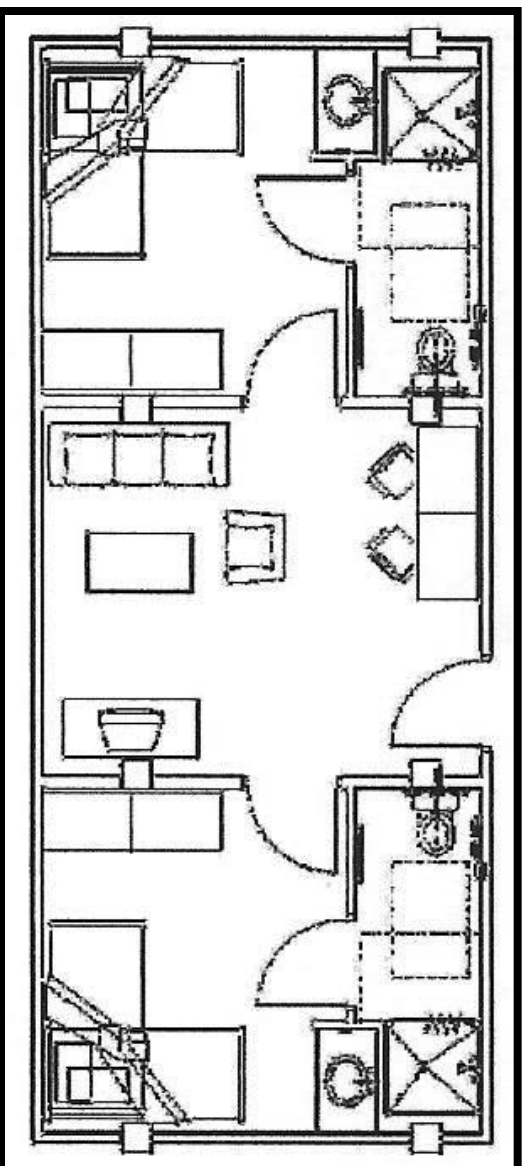


PIKA Suites vs. Maple Hill Suites

- 504 sq. ft. vs 495 sq. ft.
- 2 Bathrooms/4 vs 1 Bathroom/4
- Only all suite fraternity or sorority

PIKA Pods Of Suites

- Each room is 12' x 14'
- If alumni prefer, 2 bathrooms/4
- Generous living room & study area/4



With Generous Alumni

Support:

- Largest Greek house at 22,275 sq. ft (Currently 15,275)
- Best living accommodations on campus, featuring all suites
- Best location - closest to Engineering, Business, & Pre-Med
- Best Men and Alumni



ENTRANCE



PATIO



ROOFTOP GARDEN - AERIAL



PATIO - AERIAL



LOBBY - SKYWALK



FORMAL LIVING ROOM



STUDY AREA - TYP. 4 MAN SUITE



BEDROOM & PRIVATE BATH

