



FOUNDED ON ROCK

Dear Alumni and Friends,

I graduated from a small parish high school in 1969. I recall that my senior year my parents paid no more than \$100 in tuition. Those were the days! Weekly offertory collections subsidized the school and, praise God, there were many families more than willing to do more than their share.

Nearly 50 years later, I realize that Rockhurst High School thrives because of the generosity of those willing to do more than their share. While \$12,550 in tuition for the upcoming academic year is far beyond what many of our families can afford, the promise that \$2.4 million will be awarded in financial assistance to roughly 40 percent of the student body makes the cost become less of a shock.

We are blessed to have a financial aid endowment that will generate \$935,000 of income this coming year. Add to that the funds raised through annual giving and the auction, and we will be able to cover the full \$2.4 million. Thirteen years ago the income draw was \$10,000. We have come a long way, indeed!

Over that time, tuition has increased by 52 percent and the amount of aid increased by 159 percent, covering roughly 60 percent of diagnosed need. If only the school could grant 100 percent of the need. For that to happen, Rockhurst would need a financial aid endowment of at least \$50 million.

We can get there, but only if those with the means are called by the Spirit to do more than their share.

As I will be departing Rockhurst at the end of this academic year, I offer my sincere thank you for the kindness you have shown to me and to The Rock.



God Bless,

Rev. Terrence A. Baum, SJ, President
Rockhurst High School



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— Rev. Terrence A. Baum, SJ

Spotlight on Charitable Gift Annuities

A charitable gift annuity is an agreement with Rockhurst High School in which you agree to make a gift usually with cash or marketable securities. In return, we make fixed payments to you for life. What's left of your gift after your lifetime helps support our mission.

Example

David, 70, and Linda, 65, establish a \$20,000 charitable gift annuity with Rockhurst High School. Based on their ages, they are able to receive a payment rate of 4.4 percent, which means that they will receive \$880 each year for the remainder of their lives. They're also eligible for a charitable deduction of \$5,953* when they itemize. After their lifetimes, the remaining amount is used to support our mission.

In previous years, the charitable rollover provision has allowed an IRA account holder who is 70½ or older to make a contribution to Rockhurst from an IRA with no tax bill for gifts of up to \$100,000. Before taking any action with your IRA, be sure to discuss this with your financial advisor and/or IRA custodian.

*Based on annual payments and a 2.4 percent charitable midterm federal rate. Deductions vary based on income earned.



SEE HOW YOU CAN BENEFIT

We would be happy to run a personal calculation showing the benefits you can receive from a charitable gift annuity. Contact Mike Kleinman '59 at mkleinma@rockhursths.edu or 816-363-2036 (ext. 561), to receive this free gift illustration, with no obligation, or visit rockhursths.planmygift.org/charitable-gift-annuities.

This summer, construction is ► being completed on the lower campus of the 16,000-square-foot Student Life and Alumni Center.

Also this summer, the school will see major classroom improvements. The new space will be known as the Academic Learning Center. The Commons will provide STEAM-dedicated classrooms, focused work areas and innovative learning spaces.



The Benefits of Giving Stock

A Tax-Smart Way to Make an Impact

Making a gift of appreciated stock to Rockhurst High School is an investment with real benefits. Aside from the tax advantages of making a generous future gift, you also gain the satisfaction of knowing that you are leaving a lasting impact on a cause close to your heart.

According to a 2016 Gallup poll, more than half of Americans own stock. But many of our supporters do not realize that they can donate appreciated stock to Rockhurst to support our educational excellence in the future.

By design, investment portfolios fluctuate throughout the years. If you opt to sell investments that are worth more than what was originally paid for them, a capital gains tax must be paid. Consider donating stock to Rockhurst instead. The chart below shows how your donation can affect your total tax savings.



Save More With a Gift of Stock

	GIVE \$10,000 CASH TO US	SELL \$10,000 IN APPRECIATED PROPERTY AND GIVE CASH TO US	GIVE \$10,000 IN APPRECIATED PROPERTY DIRECTLY TO US
Fair market value of gift	\$10,000 cash	\$10,000 cash	\$10,000 property
Cost basis	N/A	\$2,000	\$2,000
Long-term capital gain	N/A	\$8,000	\$8,000
Long-term capital gains tax (\$8,000 x 15%)	N/A	(\$1,200) due to IRS	\$1,200 eliminated
Income tax savings (\$10,000 x 28%)	\$2,800	\$2,800	\$2,800
Total tax savings (capital gains tax + income tax savings)	\$2,800	\$1,600	\$4,000
Net cost of gift (fair market value of gift – total tax savings)	\$7,200	\$8,400	\$6,000

○ = BEST OPTION



INVEST IN OUR FUTURE

A gift of stock can pay dividends in the long run for you and make a difference for our students. Contact us to learn more details about making a gift of stock to Rockhurst High School.



▲ Among the most satisfying ways that our students can experience the Ignatian Service Program is by participating in the Total Ignatian Experience. These are one-week opportunities for students, faculty, staff, and families to serve in such places as Tijuana, Belize, Guatemala, Tennessee, and urban core Kansas City, among others.



ROCKHURST HIGH SCHOOL

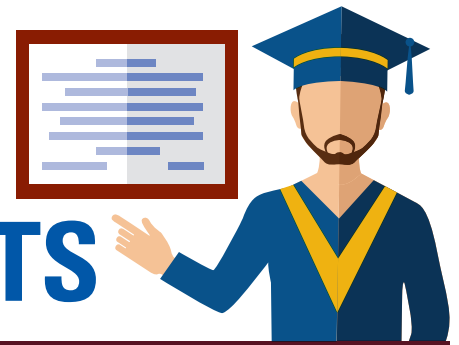
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California residents: Annuities are subject to regulation by the State of California. Payments under such agreements, however, are not protected or otherwise guaranteed by any government agency or the California Life and Health Insurance Guarantee Association. Oklahoma residents: A charitable gift annuity is not regulated by the Oklahoma Insurance Department and is not protected by a guaranty association affiliated with the Oklahoma Insurance Department. **South Dakota residents: Charitable gift annuities are not regulated by and are not under the jurisdiction of the South Dakota Division of Insurance.**



DID YOU KNOW?

6 FAST FACTS

- 1 Our Ignatian Services Program provides our students with the opportunity to demonstrate their commitment to being men of competence, conscience and compassion. All students are required to complete more than 150 hours to graduate.
- 2 Rockhurst High School's financial commitment enables student attendance from a diverse socio-economic background. This year, 43 percent of students received \$2.2 million in financial aid.
- 3 Rockhurst draws a student body that is ethnically and economically diverse from 95 different ZIP codes—56 in Missouri and 39 in Kansas. This year's freshmen entered from 29 private and 26 public middle schools.
- 4 In March, the accreditation team from AdvancED visited, toured and awarded Rockhurst its STEM (Science, Technology, Engineering and Mathematics) certification; Rockhurst also includes Arts in the STEAM programming. That made Rockhurst just the 80th school in the nation and the first in Missouri and Kansas to earn this AdvancED designation.
- 5 This spring, Rockhurst's Speech & Debate Team garnered many honors. The team is led by teacher Phillip Helt '07. At NSDA District Congress, the Rockhurst team took first place in Overall for the second straight year. In addition, two students, senior Maguire Radosevic and junior Kaelan Jungmeyer, qualified for June's national tournament to be held in Birmingham, Alabama.
- 6 A group of Rockhurst students aspiring to be engineers and work in other related fields are taking advantage of the construction projects currently on our campus. These students are working with Rockhurst's general contractors JE Dunn Construction. Through site visits and classroom time the students are being introduced to the fields of civil and structural engineering.

For more information, please call: 816-363-2036 or visit
our website: www.rockhursths.edu