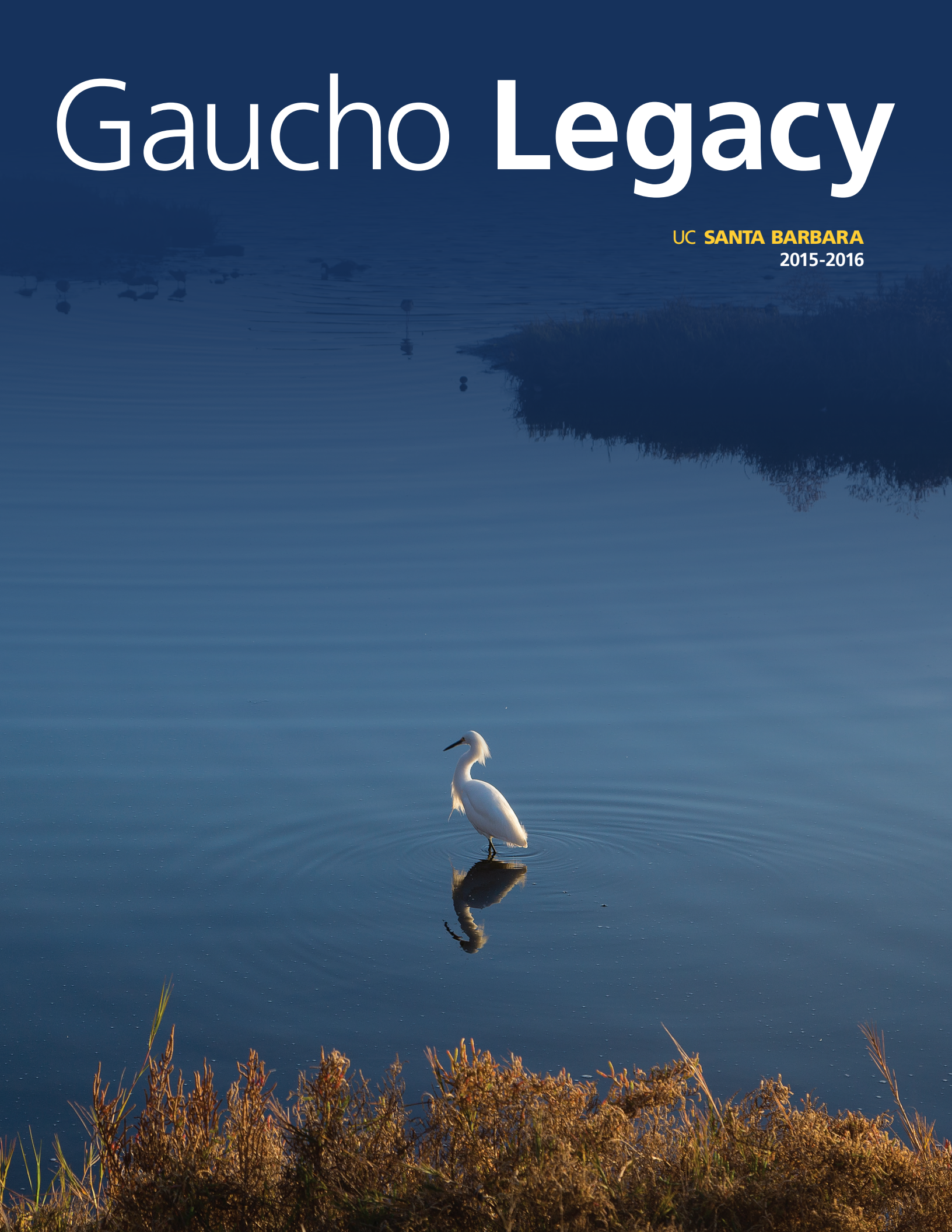


Gaucho Legacy

UC **SANTA BARBARA**
2015-2016



Gaucho Legacy

Welcome to UC Santa Barbara's new Gaucho Legacy magazine! Designed to honor the many individuals whose gifts are helping to ensure the future of the University, these pages profile some of the wonderful planned gifts our donors have established and recognize all members of the UCSB Legacy Circle.

The decision to name UC Santa Barbara in one's estate plans demonstrates not only a commitment to the future of the University and the many generations of students to come, but an understanding that our unparalleled scholarship, instruction and public service will continue to grow and expand. Our donors have chosen to support a variety of funds, programs, and departments as the beneficiaries of their support, and we are deeply grateful.

With this publication, we celebrate and honor our past, present and future legacy donors, all of whom have included UCSB as a key element in their philanthropic visions. We are honored to steward these meaningful gifts.



Ilana Ormond
Director of Planned Giving
805-893-5556
ilana.ormond@ucsb.edu

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Creating a legacy
for life-changing
research



Dr. Dennis Clegg

Richard “Dick” Breaux (‘67) and his wife **Kathy (‘68)** met while students at UC Santa Barbara. Their passion for the university has continued for decades and culminated in the creation of the Breaux Family Fellowship, supporting the stem cell research of the Clegg lab in UCSB’s Center for Stem Cell Biology and Engineering. Dick and Kathy also arranged to leave a legacy with the University, naming their Fellowship as the recipient of a bequest and adding a generous estate gift to the Jim Barber Living Scholars – Iron Gaucho Fund in the Athletics Department as well.

The Breauxs’ loyalty to their alma mater is demonstrated by volunteerism along with philanthropy. Dick served on the UCSB Alumni Association Board of Directors chairing its Finance Committee and serving a two-year term as its President. He joined the UCSB Foundation Board of Trustees in 2013. Kathy’s commitment to “giving back” is evident in her volunteer efforts with a variety of nonprofits in the Bay Area.

“We don’t know what kind of resources will remain available to us during our lifetime, so gifting now and creating future legacy gifts for UCSB made sense from a practical standpoint,” says Kathy. “Philosophically, this is the ultimate ‘pay it forward.’ Legacy giving is paying it forward at its best.”





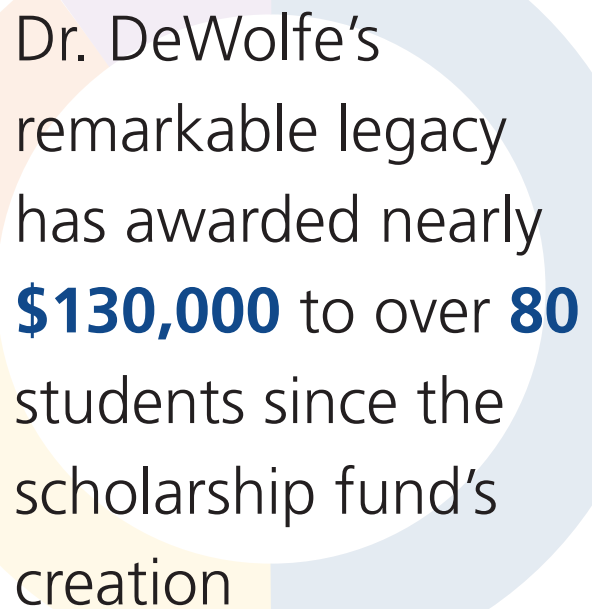
LegacyGiving

Changing lives through scholarships

Barbara Blanchard DeWolfe demonstrated her commitment to UC Santa Barbara through her work, her volunteer efforts, and her giving. An ornithologist known for her pioneering studies of avian life history and physiology, Dr. DeWolfe joined the Biological Sciences faculty at Santa Barbara Teachers College, and remained on staff as it transformed into UC Santa Barbara. Her husband, Robert, taught Chemistry until his passing in 1977, after which Barbara established a fellowship in Organic Chemistry to honor his memory.

Throughout her career and after retirement, Barbara supported a variety of departments and programs through her philanthropy. However, the significant bequest she left the University upon her passing in 2008 went directly for general scholarships to support the education of all UCSB students.

Dr. DeWolfe's remarkable legacy has awarded nearly \$130,000 to over 80 students since the scholarship fund's creation, and it will continue to provide this support for students in perpetuity. Her love for UCSB, for education, and for students is clearly illustrated through the tremendous impact her thoughtful bequest has made and continues to make for scholarship recipients.



Dr. DeWolfe's remarkable legacy has awarded nearly **\$130,000** to over **80** students since the scholarship fund's creation

LegacyGiving

Making a difference today and for the future

Dr. Guenter Ahlers joined the faculty of the UC Santa Barbara Physics Department in 1979. He and his wife, June, have been deeply connected to the department for nearly four decades, and designed their philanthropic efforts around gifts that will entice the “best and brightest” – both faculty and students -- to the Physics Department.

Their first significant gift established the Guenter and June Ahlers Chair in Experimental Physics. A few years later, they established the Guenter and June Ahlers Fellowship in Physics. In addition, they used gifts of appreciated stock and real property to create a Charitable Remainder Trust, which not only provided them with tax savings and lifetime income, but will add additional funds to the Fellowship upon their passing. This “blended gift” – arranged during their lifetimes and supported through their planned gift -- will have a powerful impact on the future of the Physics department and its recruitment of generations of graduate students.

Through a variety of generous gift options, the Ahlers have built a meaningful legacy for the university that has played such a significant role in their lives.





LegacyGiving

A love for the arts translates into a meaningful legacy

Margaret Mallory was an extraordinary woman who left an extraordinary legacy to UC Santa Barbara. A resident of Santa Barbara for nearly 50 years, Margaret originally composed music and wrote theater reviews in the 1930s. She was decorated by the French government for her role as vice president of the American Friends of France, and in 1947 she founded Falcon Films, a company producing the first 16mm art documentary films in sound and color in the United States. She served on a variety of national and international boards during her lifetime and played an instrumental role in many of the local Santa Barbara nonprofits.

A passion for music and the arts connected Margaret to UCSB, where she served as trustee of the UCSB Foundation from 1983-86 and was a board member for the UCSB Music Affiliates and the UCSB Art Affiliates. During her life, she supported special projects in the University Art Museum and Music Department and donated collections of rare books to the University Library.

Margaret left two significant bequests to UCSB upon her passing in 1998 and today, nearly 20 years later, the Margaret P. Mallory Art History Fellowship Fund and the Margaret P. Mallory Music Fellowship Fund have provided impactful, annual support to dozens of graduate students in both departments. Each year, Margaret's legacy is remembered, and each year, it makes a difference.



“My two years of study in the Masters of Music Program at UCSB were greatly influenced by the generosity of Margaret Mallory. Her Fellowship allowed me to spend my time in school perfecting my craft without the pressure of finding where my next tuition check was coming from. Although having a career in the musical arts can be financially taxing, I am blessed to have the opportunity to pursue my passion through her assistance.”

▶ Adam Bradley, 2015 recipient of the Margaret P. Mallory Music Fellowship



LegacyGiving

Planned Giving = Powerful Impact

Our generous legacy donors have provided funds for a variety of academic programs, research, student support and endowments, including:

- Fellowships to assist our graduate students throughout a variety of programs and disciplines
- Endowments for UCSB's outstanding library, supporting our unique special collections and remarkable archives
- Programming for our renowned Arts & Lectures
- Scholarships to support our next generation of Gauchos
- New endowed Chairs to attract and retain world-class faculty

31% PLANNED GIFTS

Planned gifts, designated primarily through one's estate, have a lasting impact on UCSB's future



69% OUTRIGHT

... and so much more. We are deeply grateful to all those who are building a legacy by investing in our students and our campus. We truly value your partnership.



The Legacy Circle honors donors who have included UC Santa Barbara in their estate plans through some form of planned or deferred gift.

LEGACY CIRCLE MEMBERS (as of June 30, 2016)

Anonymous (14)
 Carol* and Marshall* Ackerman
 Dr. Dana T. Aftab '85
 Dr. Guenter and June Ahlers
 Elizabeth Allred* '62
 Janet A. Alpert '68
 Christine and Donald* Anderson
 Bruce and Judy Anticouni
 Dr. Gregory and Roxanne Aposperis /'66
 Bluma Appel*
 Louise V. Arnold*
 Richard F. Aster, Jr.* '63,'65
 Dr. Stuart* and Lillian* Atkins
 Stuart R. Atkins
 Natalie O. Atkinson* '47
 Lawrence Badash*
 Drs. John D. and Janice Baldwin /'82,'84
 Dr. Peter and Helen Bancroft '41
 Virginia Bancroft*
 Leinie Schilling Bard and Archie* Bard
 Charles H. Barnes* '34
 Itzik and Marge Barpal '68,'70
 Dr. Steven and Karen Bartlett '68/'68,'70
 Ardy V. Barton*
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 '47/'48
 George Bernard Hammerle
 Donn R. Bernstein H'79
 Mark and Susan Bertelsen '66/'67
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 Dr. William T. Bielby
 Ambassador Barbara K. Bodine '70
 Dr. Eric H. Boehm
 Helen R. Borges*
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 Terry and Sharon Bridges
 Cynthia L. Brinkmann '68,'76
 Leonard* and Gretchan* Broom
 June* and Todd* Brouhard '54/H'55
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 Charles* and Harriet Burke
 Joseph and Nancy* Byrne
 Ina Theresa Campbell*
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 Marcy L. Carsey H'04
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 Erika C. Davis
 Louise Lowry Davis*
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 Dr. Rick and Sherrie Denton '68,'71
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 Peggy Fredericksen* '51
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 Alice H. Iverson*
 Susan Schwank Jamgochian '63,'81
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 Bonnie and Richard Jensen /H'06



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- Barbara and Norman Johnson
- Kenneth Karmiole '68
- Mitchell Kauffman and Joanne Moran '77
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- Jane Kievit
- Vivian King '87
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- Sallie B. Lee*
- Don and Roberta Lenkeit '65/'64,'66
- Susan and Andy Lentz
- Lorin and Karen Letendre '68,'70
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- Professor Duncan and Suzanne Mellichamp H'09/'70
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- Dr. Robert S.* and Florence* Michaelsen
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- Melvyn L. and Edwina L. Mortensen '63,'65
- Margaret C. Mosher* H'92, The Samuel B. and Margaret C. Mosher Foundation
- Jonathan E. Mudge '85*
- In Loving Memory of Al and Marjorie Nasser
- Helen Neu '70,'72
- Dr. Frank* and Sandra Nicassio '79
- Mrs. Arnold Nordsieck*
- Dr. Jon A. Norman '70,'72
- Jens Nyholm*
- George* and Vivian Obern
- Dr. Thomas L. Payne and Alice Lewis Payne '65/'65
- Col. Maxwell C.* and Ann* Pellish '61
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- Dr. Laurence Pilgeram*
- Dr. Joseph H.* and Helene Z. Pollock H'10
- John Rethorst '70
- Ann and Myron* Rice
- George W.* and Edith* Rickey
- Dr. Frank W.D. Ries*
- Carla S. Roddy '69
- Ronald and Erica Rubenstein '66
- Bernard and Lori Sandler
- Dr. Robert A.* and Dee* Scalapino '40
- Dr. Richard* and Giovanna* Schamberg
- Harvey B.* and Hope M. Schechter '47
- Jeffrey and Linda Schlageter '65,'67/'65
- Richard J. and Judith A. Schnibbe '72
- Harold* and Hester* Schoen '32
- June H. Schuerch*
- Catherine Schumann*
- Dr. Elman* and Helen* Service
- Dr. Alexander* and Sally* Sesonkske
- Henry and Harriet Sharp
- David L. and Candace A. Short '62/'67
- Arthur Silver*
- Dr. Vera Skubic*
- Connie Smith
- Dr. Norman Spears*
- Margaret Specht*
- Dean W.* and Barbara F.* Spooner '51/'55
- Judith Cosdon Stapelmann and Jack Stapelmann '63,'65
- Tom and Heather Sturgess
- Ursula S. Szeles '10
- Dr. Robert M. and Sue Talley H'99
- Cheri and Gene Thomas '60
- Dr. Jennifer Thorsch and Charles Kaska '76,'78,'81/'73
- Samuel Tokuyama '69
- Catherine Tonne and David Ohst '81
- Don Tosti*
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- Faye M. Ullom* '47
- Edward* and Carol* Valentine
- Dr. James P. Vanyo*
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- John* and Carolyn H.* Wack /'37
- Shirley F. Watkins*
- Stephen and Cyndi Weeks '71
- Claudia D. Weitlanner*
- Lisa and Howard Wenger '82/'82
- Hilda and Adrian Wenner
- Dennis M. Whelan '79
- Robert F. Whitlow* '71
- June* and Knox Williams '59
- Zoe Williams-Lambacher '76*
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- Dick and Cece Wimbish
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- Dr. Joji Yoshimura and Michael Kronstadt '74
- Joe* and Patricia Yzurdiaga
- Sherman Zelinsky*
- Janice* and John* Zoeger
- Leslie and Ernie Zomalt '64,'79/'66,'72,'89

2016 Legacy Circle Tea

UC Santa Barbara's annual Legacy Circle Tea was held on February 20, 2016. Over 60 attendees joined hosts Chancellor and Dilling Yang in their home for this special event, acknowledging those who have included UC Santa Barbara in their estate plans. Attendees were treated to a catered tea, music by UCSB jazz musicians, and words of acknowledgment from Chancellor Yang. Current Legacy Circle and retired faculty member Dr. Guenter Ahlers spoke about his and wife June's decision to establish a fellowship in Physics and endow it through a charitable remainder trust. Graduate student Jonathan Gomez shared his story about the important impact fellowship support provides.

Have you included UCSB in your estate plans? Let us know so we can welcome you as a member of the Legacy Circle and you can join us for tea next year!



Gail and Stephen Humphreys with Dilling and Chancellor Yang



Dilling Yang with Jennifer Thorsch and Charles Kaska



Ralph & Irene Wilson



Dilling Yang with Thelma and Walter Mead



Guest speaker Jonathan Gomez, Eva Haller, Chancellor Yang and Yoel Haller

GivingOptions

The donors profiled in these pages used a variety of planned giving options to create their legacies with UC Santa Barbara. Their benefits included significant tax benefits, additional lifetime income, and – most importantly -- the ability to make a difference for generations of UCSB students. Interested in exploring? Below are descriptions of some of the planned giving opportunities available:

- **Bequests:** Name the UC Santa Barbara Foundation as a beneficiary in your will or living trust. We can provide you with the appropriate bequest language so you may direct your gift to the program or project that best fits your passion.
- **IRA/Life Insurance:** Name the UC Santa Barbara Foundation and the program of your choice as a beneficiary of all or a portion of your retirement plan or life insurance policy.
- **Charitable Gift Annuity:** This option is a contract between you and the UC Regents on behalf of UC Santa Barbara. In exchange for your irrevocable gift of cash or appreciated assets, you can receive a guaranteed, lifetime income in monthly or quarterly installments based on your age. We would be happy to provide you with additional information and a sample proposal upon your request.
- **Charitable Remainder Trust:** Transfer cash or appreciated property to the trust and receive significant tax benefits and annual income. Payments may be fixed or variable, and the trust must be funded with a minimum of \$100,000. Upon the termination of the trust, the assets are transferred to the UC Santa Barbara Foundation and the program or project of your choice.
- **Gifts of real estate** are often some of the most creative and beneficial planned gifts. Real estate may be used to fund the life income vehicle described above or a Retained Life Estate.

To learn more about any of these options, please visit our website at www.plannedgiving@ucsb.org.



If you wish to discuss planned or deferred giving options at UC Santa Barbara, or have questions about how your gift can support a program close to your heart, please contact Ilana Ormond, Director of Planned Giving, at 805-893-5556 or by email at ilana.ormond@ucsb.edu.

Interested in reading more of our donor stories or reviewing other examples of planned gifts? Visit our website at www.plannedgiving.ucsb.edu

UC Santa Barbara Office of Development / Planned Giving
www.plannedgiving.ucsb.edu (805) 893-5556.

