



# Annual Report of Planned Giving

FOR THE YEAR ENDING JUNE 30, 2017





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## Dear Friends,

I'm delighted to share with you our 2016-2017 Annual Report of Planned Giving. This new publication highlights the importance of planned and legacy giving and the significant growth and impact these gifts have had at UC Santa Barbara in the past year.

These pages honor the many individuals whose decision to create a legacy at UCSB is making a meaningful difference for the future of the university. Our nine donor profiles present a variety of alumni, faculty and friends who have established generous and thoughtful planned gifts for the benefit of UCSB. Members of our Legacy Circle are recognized in this publication, acknowledging the powerful example they all set in demonstrating a commitment to the generations of Gauchos to come.

We are proud to celebrate our past, present and future legacy donors who have included UCSB in their philanthropic visions, and hope you find their stories inspiring and insightful. Enjoy!

Warmly,



**Ilana Ormond**  
Director of Planned Giving  
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## Legacy Giving

### 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
- Departmental and research support
- Scholarships to support our next generation of Gauchos
- New endowed chairs to attract and retain world-class faculty

... 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.**



**\$100.1** MILLION total gifts raised in FY 2017

**Planned Gifts**  
**24%**



**Outright Gifts**  
**76%**





## George Holbrook

### Legacy Gift: Graduate research fellowships at the Institute for Energy Efficiency



George Holbrook, local resident, venture investor and philanthropist, has pledged a \$4 million bequest from his estate to fund continued support of the Holbrook Foundation Fellowships he created in 2011.

Holbrook, with a bachelor's degree in mechanical engineering from Cornell University, found an ideal outlet for his charitable giving in UC Santa Barbara's Institute for Energy Efficiency (IEE).

"My charitable objective has always been to support exceptional people," said Holbrook, also a UC Santa Barbara Foundation Trustee. "It's all future-oriented and it feels good to do it. I expect great things, of course, and we've had really bright students — great future engineers and scientists. The fellows by and large have been an impressive group that hopefully will do some good in the world. I want them to think big. Hopefully they will in fact change the world."

That's the aim, asserted IEE Director John Bowers, a professor of electrical and computer engineering and holder of the Fred Kavli Chair in Nanotechnology.

"If you want to build a strong university you need the right faculty, and once you have good faculty, to get great results you need great students," Bowers said.



“George recognized that early on and wanted to help out. He’s doing this to get really outstanding results. These are things you can’t necessarily plan for, but he sets high expectations. Having ambitious goals is really good for the students — it can motivate them to do something really significant to make the world a better place. And these are students who will get fellowship offers from pretty much everywhere they apply, so thanks to George, this allows us to be competitive with other institutions.

“Typically, we’ll have one fellow working on more efficient LEDs, one on more efficient solar panels, one on data centers, one on photonics and electronics and so on,” Bowers explained. “All the different aspects are represented, and they’re all important. These are important technologies for all of us and how we live, so we’re not depleting our precious oil and gas reserves and wasting them in ways that don’t make sense. It’s about getting us to live on a better planet than we are right now.”

The fellows are selected by a committee of the IEE Solution Group Heads — typically six each year — one for each

of those solutions groups: lighting, production and storage, sustainability, electronics and photonics, computing, and buildings and design.

Designed to assist faculty in drawing to UCSB outstanding prospects with a research focus in energy efficiency, the competitive fellowships provide a quarterly stipend, additive to the student’s existing funding over their first year. It also includes a paid summer research position, participation in select institute events and meetings with select visiting speakers. Fellows must give a short seminar during the academic year.

“It is a special pleasure to extend sincere thanks on behalf of the UCSB College of Engineering to George Holbrook for providing a bequest to support, in perpetuity, the Holbrook Foundation Fellowships he created in 2011,” said Dean Rod Alferness. “His initial gift has provided indispensable support to 32 graduate students in the six vitally important areas of IEE research. This new gift ensures that generations of students will follow them, making a difference while carrying forward Holbrook’s vision for a better world.”

For the past 40 years, Holbrook has been a managing partner of Bradley Resources Company LLC, a private investment company which organizes and finances ventures in technology, medical devices and natural resource and power plant development, and manages a portfolio of public companies. He has provided capital and guidance to start-up and early stage companies primarily in the energy, natural resource and medical and industrial technology industries.

Chairman of the board of Thingap for 15 years, a local developer and producer of efficient electric motors Holbrook also has served as a director of the Merrill Lynch Institutional fund and chaired the endowment investment committee at Alfred University. Until recently he served on the endowment committee of the Music Academy of the West and on the Board of Unite to Light. He is a past recipient of the Venky Narayanamurti Entrepreneurial Leadership Award from UCSB’s Technology Management Program.



## Paul '84 and Joy Boyle

### Legacy Gift: UCDC Program



Paul Boyle '84 fell in love with the UC Santa Barbara campus from the moment he first visited. He knew the political science departments at the UCs were strong, and he therefore decided UCSB was the perfect university for this degree.

During his junior year, Boyle sought an internship in Washington, D.C. At the time, there was no formal structure in place to assist students seeking these internships, and he was fortunate to find a helpful alumna who guided him through the process. Today, the UC Washington Center (UCDC) program

provides a variety of internships and practical experience to a number of political science students annually.

Boyle's love of this field eventually led him to the position he holds now as Senior Vice President of the News Media Alliance, lobbying in Washington, D.C. on behalf of 2,000 diverse U.S. news organizations. He credits his studies at UCSB for his successful career.

*"As I get older, says Boyle, "I realize that the wonderful education I received at UCSB helped make me the person I am today, and it's time to give back."*

He and his wife, Joy, have both included their alma maters in their estate plans. Boyle has designated his bequest to student scholarships for the UCDC program at UC Santa Barbara, while Joy has designated a study abroad program at Wake Forest University.

"We both had life-changing experiences during our college years, and are grateful we can help make that possible for students needing financial aid and other support on the path to success," said Boyle.



## Stephen and Gail Humphreys

Legacy Gift: Collection of Middle East materials & Center for Middle East Studies



In 1989, professor R. Stephen Humphreys was recruited by UC Santa Barbara to hold the newly-established King Abdul Aziz Ibn Saud Chair in Islamic Studies. It was a difficult decision to leave his position at the University of Wisconsin, Madison, and for his wife, Gail, to resign from her role as legislative lobbyist. Nevertheless, it was the pursuit of Humphreys' dream to create a center for Middle East Studies that led the two to accept the offer.

The Humphreys found that life at UCSB "far exceeded [their] expectations." Stephen Humphreys not only partnered with fellow colleagues to establish UCSB's Center for Middle East Studies, but also

joined the editorial committee of the University of California press.

In 2000, the Humphreys' began collecting rare and antiquarian books and maps related to the Middle East. In their estate plans, they arranged for these materials to be gifted to Special Collections at the UCSB Library, where they knew "the collection [would] be visible and make a difference." The Humphreys are also donating Stephen's collection of materials related to the history and societies of diverse countries and cultures.

Most generously, the Humphreys named UCSB as the beneficiary of funds that will create two new endowments: one

will support the collection of rare and antiquarian books, and fund research by a graduate student and/or visiting lecturer; the other supports the Center for Middle East Studies and related graduate student research.

UCSB made an impact on the lives of the Humphreys', and in return, they have established legacy gifts that will have a tremendous impact on future students. [Stephen Humphreys notes that creating their planned gifts allowed them to not only continue his passion and guarantee the continuity of his work, but "provide an opportunity to give back to the university that gave \[them\] so much."](#)



## Fran '80 and Barbara Mancia

Legacy Gift: Mosher Alumni House and communication scholarships



Fran Mancia knew that the quality of people, the depth of passion, and the exceptional pride he found at UC Santa Barbara proved it was just the right university for him. He majored in communication, which taught him the value of being articulate, conveying messages in a concise manner, and how to read people. This degree laid the foundation for the work he does today as the vice president of government relations for MuniServices, a company providing revenue protection and enhancement services to approximately 1,000 local government agencies throughout the United States.

Several years ago, Mancia began attending alumni events near his home in Sacramento. He then joined UCSB's Communication Alumni Council, representing the department and assisting students with communication internships and job searches. He was elected to the board of UCSB's Alumni Association, currently serves as an Alumni Regent for the Board of Regents of the University of California, and is President of the Alumni Associations of the University of California.

Inspired not only by his time as a Gaucho but by his involvement as an alumnus, Mancia began to explore ways in which to leave his legacy. His wife, Barbara, was

also deeply involved in local community and nonprofit endeavors, and together the two of them crafted their philanthropic vision.

The Mancias' bequest will support scholarships for communication majors, alumni legacy scholarships and the maintenance of the campus's Mosher Alumni House, which Mancia believes is truly the flagship for UCSB alumni. He notes that his "heart and soul are all Gaucho," and that one shouldn't hesitate to "foster and carry forward one's specific passions for future generations to experience and enjoy." As he puts it, "No legacy gift is too small."



## David "DJ" W. Posley, Jr. '09

### Legacy Gift: Men's Basketball



One would not expect an alumnus from the class of 2009 to be thinking about philanthropic legacies, but DJ Posley is not your average young man.

Posley grew up in Illinois and by the age of seven was helping with his family's Allstate Insurance business. While attending junior college and playing basketball for an NCAA Division 1 Independent, he was recruited for the UC Santa Barbara men's basketball team. On a visit to see the campus, Posley realized that he had discovered the very best lifestyle. "I felt that UCSB was built just for me," he recalled.

Originally a business and economics major, Posley found himself drawn to sociology, where he learned to analyze, observe and understand people. He notes, "My studies made me see everybody through a different lens."

Posley believes that his major, along with his time on the Gaucho basketball team, guided him to his next endeavor.

Since graduation, Posley moved back to Illinois to launch his own business, DW Capital. His mission, in his words, is to "give hope" through venture capital funding, financial management, and grass roots efforts

to bring people together in meaningful partnerships. He has also begun outlining his philanthropic goals, and has taken a first, significant step toward establishing his legacy by naming the UCSB men's basketball program as the beneficiary of his \$1,000,000 life insurance policy.

DJ Posley sets a remarkable example, not only for younger Gauchos shaping their philanthropic visions, but for everyone. He has been driven since childhood to strive for greatness while always remembering to give back. This legacy gift is an example of these lessons, and through his generosity, they will be passed on to generations of Gauchos to come.



## Jennifer Thorsch '76, '81 and Charles Kaska '73

### Legacy Gift: Cheadle Center for Biodiversity and Ecological Restoration



Jennifer Thorsch arrived at the UC Santa Barbara campus in the fall of 1971 and never left. Recovering from a knee dislocation that curtailed her plans to attend an out-of-state college, Thorsch and her mother drove to UCSB with transcript in hand, requesting and receiving acceptance as a freshman that very day. After moving in to her off-campus housing, Jennifer met her neighbor, Charles Kaska, a transfer student and psychology major who eventually became her husband.

Thorsch completed her bachelor's degree in biology, subsequently earning a master's and doctorate in plant biology

from UCSB. She was privileged to have the late Katherine Esau, a world-renowned plant biologist and UCSB Professor Emeritus, elect to come back from retirement to serve as Thorsch's advisor. After completing her doctorate, Thorsch was hired by Vernon Cheadle to run his on-campus laboratory. Kaska completed his bachelor's degree while playing rugby for the UCSB rugby team. He subsequently earned a teaching credential and spent his career working with special needs students in the Santa Barbara School District.

Thorsch and Kaska happily pursued their careers and raised a family in

Santa Barbara. In 2004, Thorsch was named director of UCSB's Museum of Systematics and Ecology (MSE), and subsequently restructured MSE into the Cheadle Center for Biodiversity and Ecological Restoration (CCBER). A generous bequest from Katherine Esau's estate provided funding to move CCBER into a new facility, and the Esau endowment continues to support CCBER's work today. *In turn, Thorsch and Kaska, now retired, have named CCBER as a beneficiary of their own estate plans, supporting the campus that made such a difference in their lives while recognizing the power and impact of a legacy gift.*



## Dawn Wright Ph.D.'94

### Legacy Gift: Unrestricted to UC Santa Barbara



Dawn Wright, Ph.D.'94 is currently the Chief Scientist of the Environmental Systems Research Institute (ESRI). Her work involves the geological mapping of the ocean floor, advising organizations on oceanography and fisheries, and interfacing with government, industry and the public to understand and find environmental solutions. Wright's path to this prestigious position included a Ph.D. from UC Santa Barbara in both Geography and Marine Geology.

Growing up in Hawaii, Wright honed her interest in oceanography at a

young age. She earned a bachelor's degree in Geology at Wheaton College, and a master's degree at Texas A&M. At UC Santa Barbara, studying for her doctorate, she learned for the first time about "geographic information systems" (GIS) through the Geography department, which in turn led her to a career that now combines GIS with oceanographic work. Wright shares that "UCSB had a huge impact on me in so many ways: the making of lifelong friends, the shaping of my world view and ethic as an academic professional and scientist, and a grounding in geographic information

systems (GIS) that led to where I am today. *Over the years, my experiences at UCSB have become among the most precious to me, and that let me to select the University as a major beneficiary in my estate plans.*"

Wright has established a generous bequest in her estate plans, designating a planned gift for unrestricted support of the University. This wonderful legacy gift has enabled Wright to "give back" to the institution that has played such a significant role in her life, and to inspire future students and scientists for years to come.



## Leonard and Gretchan Broom

### Legacy Gift: Broom Center and Chair in Demography



Leonard Broom was a renowned sociology professor who held prominent academic positions at universities in both the U.S. and abroad before becoming an adjunct research professor in the department of sociology at UC Santa Barbara. He and his wife, Gretchan, chose to establish a significant legacy with UCSB by crafting separate planned gifts to support two passions: Demography (the statistical study of human populations) and helping to provide housing assistance for new faculty recruited by the university.

Drawing from Professor Broom's own research and working in partnership with UCSB, the Brooms launched The Leonard and Gretchan Broom Center for Demography as an interdisciplinary research center on campus. They also created a bequest in their estate plans to establish an endowment to support the Center, which offers research and training in social demography and population studies. Additionally, the Brooms created and funded The Leonard Broom Chair in Demography to attract a high-level scholar to lead the new Center.

The Brooms also separately created a "retained life estate" for the benefit of UCSB, gifting their home to the university and retaining the right to live in it for the remainder of their lives. With Gretchan's passing in 2016 (Dr. Broom passed away in 2009), both significant gifts came to fruition.

UCSB sold the Broom residence to create a fund that assists new faculty with housing in Santa Barbara, and the endowment funds were distributed for Center's ongoing activities. **The impact these planned gifts have made ensures that the Brooms' legacy will live on through the demography research of future UCSB faculty and scholars.**



## Carolyn and Vernon Christensen

Legacy Gift: Kevin Sage Christensen 1992 Memorial Scholarship Fund



The Kevin Sage Christensen 1992 Memorial Scholarship honors the only child of the late Carolyn and Vernon Christensen. Kevin, who passed away while attending UC Santa Barbara, would have been a member of the Class of 1992. His parents generously gifted their entire estate to campus, and this remarkable bequest created the scholarship fund in 2010.

Since its inception, this memorial endowment has distributed over \$150,000 in scholarship awards, benefiting nearly 100 Gauchos by providing need-based financial aid awards. In the last seven years, the UC Santa Barbara Foundation has increased the endowment's value by 20%, increasing the number of students who have the distinction of receiving scholarships bearing Kevin's name.

The Christensens chose to honor their son in this important and meaningful way and provided UCSB with the honor of stewarding Kevin's legacy for generations of students to come. His flame will forever burn brightly at UCSB.





## Legacy Circle

The Legacy Circle honors alumni, friends, faculty and staff who have included UC Santa Barbara in their estate plans through some form of planned gift. Membership in the society is extended to those who have communicated to the university their intention to make a gift through a bequest, charitable trust, charitable gift annuity, pooled income funds, life insurance, retirement fund or a gift of property with a retained life estate. The following generous donors are providing the legacy of support that will enable UC Santa Barbara to continue to grow and excel.

- Anonymous (20)  
 Carol\* and Marshall\* Ackerman  
 Dr. Dana T. Aftab '85  
 Dr. Güenter and June Ahlers  
 Elizabeth Allred\* '62  
 Janet A. Alpert '68  
 Pat and Bill Altman '57  
 Judy and Bruce 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  
 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\*  
 Dr. Richard A. Baum '74  
 June York\* Behrens and Henry W.\* Behrens '47/'48  
 George Bernard Hammer  
 Donn R. Bernstein H'79  
 Mark and Susan Bertelsen '66/'67  
 Dr. William T. Bielby  
 Ambassador Barbara K. Bodine '70  
 Dr. Eric H. Boehm\*  
 Helen R. Borges\*  
 Paul and Joy Boyle '84  
 Richard L. and Kathryn Gee Breaux '67/'68  
 Irving B. Bricken\*  
 Terry and Sharon Bridges  
 Cynthia L. Brinkmann '68,'76  
 Leonard\* and Gretchan\* Broom  
 June\* and Todd\* Brouhard '54/H'55  
 Dr. William\* and Patricia Bullough  
 Charles\* and Harriet Burke  
 Joseph and Nancy\* Byrne  
 Ina Theresa Campbell\*  
 Janet Lea Campbell '74  
 Roger and Jan Capps  
 Marcy L. Carsey H'04  
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 Vernon I.\* and Mary Low\* Cheadle H'90/H'90  
 Bill and Mary Cheadle  
 Isabel K. Chissar\*  
 Carolyn S.\* and Vernon G.\* Christensen  
 David Kam W. and Betty Y. Chu  
 Marvin Clarke\* '51  
 Marjorie A. Cole '64  
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 William R. and Rita Collins '58/'63  
 Michael J. Connell Memorial Fund  
 Fred Conrad\* '52  
 Jean A. Corle\*  
 Flora Courtois\*  
 Dr. John C. Crowell\*  
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 Eugene\* and Suzette\* Davidson  
 Burt L. Davis\* '78  
 Richard\* and Erika Davis  
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 Len DeBenedictis '62  
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 Jim Dixon and Barbara Day '84  
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 Dr. Maurice\* and Suzanne\* Faulkner  
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 Peter Feldmann '65  
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 Vasanti Ferrando Fithian '60  
 Peggy Fredericksen\* '51  
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 Helmar S. Janee\*  
 Richard and Bonnie Jensen H'06  
 James A. Jimenez\*  
 Dr. D. Barton and Sheila G. Johnson '59,'62  
 Barbara and Norman Johnson  
 Kenneth Karmiole '68  
 Dr. David Gray and Prof. Linda Kauffman /'71,'78  
 Mitchell Kauffman and Joanne Moran '77  
 Dr. George and Joan Kerns '69,'80  
 Jane Kievit  
 Vivian King '87  
 William A. and Linda R. Kitchen



Janet Krom\*  
 Mathilda Christiansen Kuehl\* '62  
 Sandra Ina Lamb\*  
 R. Marilyn Lee and Harvey A. Schneider '69  
 Sallie B. Lee\*  
 Don and Roberta Lenkeit '65/'64,'66  
 Susan and Andy Lentz  
 Lorin and Karen Letendre '68,'70  
 Stephen A. Levandowski '69  
 Jody A. Linick and Christer Hagghult '85  
 Marjorie D. Linton\* '56  
 Dr. Robert L.\* and Joan Lorden '49  
 Bruce Lombard\* '70  
 Gayle Lynds  
 Caroline Street Maddock and Thomas Maddock '61  
 Margaret Mallory\*  
 Fransesco D. and Barbara Mancia '80  
 York T. Mandra  
 Jack\* and Anthea Mannion  
 Carmen Anita Manus Trust  
 Ricki Vinyard Marder and David Marder '79  
 Dr. James Marston '02  
 Dr. Richard M. and Penny J. Martin  
 Ronald L.\* and Carol\* Mays '58  
 Nancy McCagney\*  
 Betty Fobair McDermott '51  
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 Dr. Jim and Marilyn Phelps McNamara '85/'82  
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 Professor Duncan and Suzanne Mellichamp H'09/'70  
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 Ismene Michou\* '53  
 Sara Miller McCune H'05  
 Dr. Michael and Nan Miller  
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 Chester G. Moore III and Elaine J. Moore '64  
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 Melvyn L. and Edwina L. Mortensen '63,'65

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 Margaret C. Mosher Foundation  
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 Frank Natale\*  
 Helene Neu '70,'72  
 Dr. Frank\* and Sandra Nicassio '79  
 Mrs. Arnold Nordsieck\*  
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 George\* and Vivian\* Obern  
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 Col. Maxwell C.\* and Ann\* Pellish '61  
 Garie and Ken Perry  
 Dr. Laurence Pilgeram\*  
 Dr. Joseph H.\* and Helene Z. Pollock H'10  
 David Wayne Posley, Jr. '11  
 John Rethorst '70  
 Dr. Ann and Myron\* Rice  
 George W.\* and Edith\* Rickey  
 Dr. Frank W.D. Ries\*  
 Darcy Ruth Ritzau  
 Carla S. Roddy '69  
 Ronald and Erica Rubenstein '66  
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 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\*  
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 Dr. Alexander\* and Sally\* Sesonkske  
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 Dr. Norman Spears\*  
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Judith Cosdon Stapelmann and  
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 '76,'78,'81/'73  
 Samuel Tokuyama '69  
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 Ditte Wolff  
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 Dawn J. Wright, Ph.D. '94  
 Dr. Joji Yoshimura and Michael Kronstadt '74  
 Joe\* and Patricia Yzurdiaga  
 Sherman Zelinsky\*  
 Janice\* and John\* Zoeger  
 Drs. Leslie and Ernie Zomalt '64,'79/'66,'72,'89  
 Carl B. Zytowski

\*Deceased

H = Honorary Alumni

Note: UCSB graduation years for joint donors  
 are listed consecutively, for example: '71/'71

*Legacy Circle Members as of June 30, 2017*





Chancellor Henry T. Yang



Chet and Elaine Moore, Cathy Tonne and AVC for Alumni Affairs George Thurlow



Len DeBenedictis



Joan Kerns and Mrs. Dilling Yang

## 2017 Legacy Circle Tea

UC Santa Barbara welcomed 60+ guests to its annual Legacy Circle Tea, hosted by Chancellor and Dilling Yang. Designed to recognize those who have included UCSB in their estate plans, the Legacy Tea brings old and new UCSB friends together in appreciation. Student jazz musicians provided entertainment and the attendees were treated to a delicious buffet of tea sandwiches and mini desserts. Legacy Circle member Len DeBenedictis '67 spoke about his decision to name UCSB as a beneficiary of his plans as well as his recent return to campus as a Physics student. Chancellor Yang acknowledged the generosity and foresight of the Legacy Circle members, noting that planned gifts help ensure that research, teaching and exceptional programs at UCSB will continue well into the future.

If you have included UCSB in your estate plans and wish to be included in the Legacy Circle, please let us know. We look forward to welcoming you to next year's Tea.



# Giving Options

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.edu](http://www.plannedgiving.ucsb.edu).



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](mailto:ilana.ormond@ucsb.edu).



## THE COVER

Wildflowers blanket the west end of Santa Cruz Island, part of the UCSB Natural Reserve System.

To learn more, visit <http://www.news.ucsb.edu/stewards-nature>

Photography by Matt Perko

