



A Legacy Perspective

Annual Report of Planned Giving

For the year ending June 30, 2018

UC SANTA BARBARA



Dear Friends,

We are delighted to present our 2017-2018 Annual Report of Planned Giving. The number of remarkable donors committed to ensuring the future of UC Santa Barbara continues to increase, and this report reflects the generosity of these legacy gifts and their impact in this past year.

We are pleased to profile yet another group of dedicated alumni, faculty, staff and community members who have included UC Santa Barbara in their estate plans. Their gifts will make a meaningful difference for generations of Gauchos to come. These individuals, all of whom are members of the Legacy Circle, set an outstanding example of generosity and foresight for others to follow.

UC Santa Barbara is proud to recognize past, present and future donors who have created a legacy for our campus and community. It is an honor to implement and steward their philanthropic visions, and we hope you find their stories inspiring!

Warmly,

Ilana Ormond
Director, Planned Giving

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Financial Highlights

Legacy Giving

Planned Giving = Powerful Impact

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

- Fellowships to assist UCSB 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 the next generation of Gauchos

... and so much more.

\$100 MILLION total gifts raised in 2017-18



Stories of Commitment

An International Perspective

Steve '63 and Barbara Mendell Support Scholarships

"Those that can help create opportunities for others should do so," said Steve Mendell '63. The power of education inspired Steve and his wife Barbara to create the Mendell Award in Political Science, an annual scholarship that will be endowed through a bequest.

As a UC Santa Barbara student, Steve was involved in a range of activities which included his fraternity, student government as class president, and intramural sports, where he won the wrestling championship. He chose to create a legacy with UC Santa Barbara and the Department of Political Science because he believes that one of our most important responsibilities is to educate future generations and help ensure a civil public discourse.

UC Santa Barbara's political science program helped prepare Steve for his career in international business. After graduating in 1963, Steve studied French at the Defense Language Institute and was sent to Vietnam as an Army Intelligence Officer. A few years later, while stationed in San Diego, he met his wife, Barbara. Steve and Barbara were married in Belgium, where Steve led the counter intelligence section at NATO's' Supreme Headquarters, Allied Powers Europe.

After attending graduate school, Steve joined the international division of Becton Dickinson, a large medical company. In the following years, Steve and Barbara moved many times in the U.S., Europe and in Latin America, while adding two sons, Brooks and Loren, to their family.

Since returning to California, Steve has been CEO of several medical and biopharmaceutical companies. Now retired, Steve enjoys helping others and has served as chairman or board member of numerous organizations, including the Chairman's Roundtable and the Young Presidents Organization Gold Chapter in San Diego. He has remained deeply involved with UCSB, serving as a former chair and longtime trustee of the UC Santa Barbara Foundation and as a member of the Alumni Association's board of directors. Steve is currently the co-chair of the San Diego Regional Leadership Committee, helping to expand the network of Gauchos in this region.



Remembered in Nature

Muriel Carlton Supports North Campus Open Space

Long before Muriel and her late husband John became stewards of the Santa Barbara coastal wetlands, they were students together at the University of Wisconsin, Madison.

When John Carlton met his wife Muriel, he was working on a master's degree in ecological journalism while freelancing for outdoor magazines. After 29 years teaching and guiding the Catalina High School newspaper to win Scholastic



Journalism's all-time national award, John retired in 1989. Muriel and John spent 56 years together before he passed away in 2015.

Muriel's deep love for John and his connection to nature inspired her support of the North Campus Open Space project. Through her support, Muriel encourages people to love and protect the habitats of the reserve. Her gift helps restore over 2.5 miles of scenic trails that provide opportunities to connect with John's passion: the public trails and parks that trace California's coastline.

Supporting North Campus Open Space is a family legacy. Muriel's brother-in-law, Duncan Mellichamp, is a professor emeritus and founder of UC Santa Barbara's Department of Chemical Engineering. Duncan and John's sister, Suzanne, inspired Muriel to honor John by naming the North Campus Open Space Plaza after him.

Muriel achieved this legacy through a "blended gift," donating now to name the plaza while creating a charitable gift annuity that will provide the funds to maintain the plaza in the future. The annuity provides her with guaranteed lifetime income while supporting a habitat and learning environment that can only be found at UC Santa Barbara.

"It feels good to make a difference," Muriel said. She knows John would have admired the North Campus Open Space and her role as a wildlife protector. Thanks to the Carltons, students and families can research, teach and explore the reserve's beautiful habitats.

A Place of Joy

Jenny '01 and John '00, '10 Lofthus Support Alumni Scholarship Fund

Jenny '01 and John '00, '10 Lofthus are the youngest couple welcomed into the UC Santa Barbara Legacy Circle. The Lofthuses designated their bequest to the Alumni Scholarship Fund to support future students. Their daughter Austen would be "UCSB Class of 2033," they joked.



"It was essential for us to have an estate plan in place with a young child, and it made sense to include a bequest to UC Santa Barbara, among others, in that plan," said Jenny.

When Jenny and John first met in fall 1997, they couldn't have imagined the life they'd build together. At the time, John worked for the UC Santa Barbara Family Vacation Center while Jenny studied for her law degree at the Santa Barbara College of Law. They finally went on their first date in January 2008. One year later, they wed in a ceremony that overlooked the UC Santa Barbara lagoon.

Both Jenny and John work to strengthen UC Santa Barbara's community. John is the associate director of the UCSB Alumni Association, and Jenny is a policy coordinator and deputy Americans with Disabilities Act Compliance officer for UC Santa Barbara. They volunteer with a variety of Santa Barbara nonprofits and felt it important to include charity in their estate plans.

The Lofthuses are proud to set an example for others their age by leaving a legacy with UC Santa Barbara. "Our memories, lifetime friendships and experiences are all tied to campus," says Jenny. "UC Santa Barbara is our place of joy."

Journey of the Human Spirit

Alan Grosenheider Supports UC Santa Barbara Library

"I'm following my bliss, and fundraising helps others follow their bliss," said Alan Grosenheider, paraphrasing Joseph Campbell, the famed professor of human spirit and mythology. For Alan, this means naming both the University of Hawai'i at Mānoa library and the UC Santa Barbara Library as beneficiaries in his estate plans in honor of his journey.

Alan did not plan to be a librarian. As a graduate student at the University of Washington, Alan studied Buddhist, Tibetan, and Sanskrit philosophies.



He discovered library science as a student worker in the university library and switched degrees. Alan's new career began with cataloging 10,000 untouched Sanskrit volumes in the library basement. His work earned him a post as the University of Washington librarian for South Asian collections.

Alan followed his passion all the way to the University of Hawai'i at Mānoa, where he became the South Asian collection librarian in 2005. He moved into library administration at the university while obtaining his second master's degree in organizational development and psychology. In 2012, Alan joined UC Santa Barbara as deputy university librarian. He and his husband, Steve, agreed that Santa Barbara was the right place to raise their two boys, and they've been part of the community since.

Alan is proud to cultivate the library in his professional and personal life. "Even a small bequest can make a difference for a future student or employee," he said.

His gifts will help students, faculty and archivists unearth knowledge as they follow their research – and their bliss – into uncharted fields at UC Santa Barbara.

A Creative Continuum

Susan Matsumoto and Mel Kennedy Support Arts & Lectures

Susan Matsumoto and Mel Kennedy are a husband-and-wife team whose toys and inventions have become household names. The couple is inspired by the rich cultural life of UC Santa Barbara's Arts & Lectures. Preserving a space to celebrate theater, dance, music and global luminaries is so important to them that they have named UC Santa Barbara Arts & Lectures as a beneficiary of their retirement plan.



"The cultural programming at UC Santa Barbara is even more wide-ranging than what we found in New York," said Mel.

Just after graduating from CalArts with a fashion design degree, Susan began designing doll dresses for Mattel in El Segundo. Floors away, a UC Berkeley mechanical engineering alumnus named Mel designed Hot Wheels cars. They finally met in New York, where they had both moved to pursue the toy industry.

They married in 1983, and eight years later merged their talents to form Kennedy-Matsumoto Design. Susan conceives the ideas and marketing for inventions, while Mel makes the designs a reality with his engineering expertise. Working with various partners, past successes have included "Skip It," "Quick Braid" and "Baby Brezza."

Susan and Mel settled in Santa Barbara in 2012. Although they continue to work, they have also devoted much of their time to attending UC Santa Barbara Arts & Lectures programs.

"Our attorneys both recommended the IRA as the best way to make a charitable gift, and we chose to leave a percentage to A&L," said Susan. "We not only appreciate the programming, but love the fact that Arts & Lectures introduces the arts to schools in the local community." With their legacy gifts as well as their legacy of invention, Susan and Mel will foster imagination in generations to come.

Shaping Values Through Leadership

Rafael Costas '86 Supports Access to Knowledge

Rafael Costas '86 named UC Santa Barbara as a beneficiary in his estate plan to ensure the UC Santa Barbara Library and the Department of Economics continue to help students explore the world of ideas, the creation of knowledge, and the fiscal principals that guide society.



A physics-turned-economics student who arrived on campus unsure of his future, Rafael credits UC Santa Barbara with finding his calling and shaping his values. While working at the UC Santa Barbara Library, Rafael discovered a lifelong mentor in his supervisor, Margaret Morez, whom he visits whenever he returns to campus.

"My job taught me about professional responsibility, living within one's means, and working with people who are different from yourself," Rafael said. His experience at the library helped guide Rafael to his future.

While the library introduced him to the working world, the Department of Economics prepared Rafael for his responsibilities as senior vice president at Franklin Templeton Investments. Rafael joined the UC Santa Barbara Department of Economics Board of Advisors to help students discover their own careers. Rafael believes a university education is a "social vaccine" against ignorance and intolerance. His legacy will empower UC Santa Barbara students to venture into the world as compassionate, inquisitive individuals.

Stories of Impact

Time Travel Through Rare Recordings

William R. Moran Estate

William R. Moran changed how we learn about technology and recorded music. His fascination with how we sang and spoke in the early twentieth century drove his private collection of over 30,000+ recordings, cylinders, books, equipment and ephemera. Thanks to his generous estate plan, these voices can be heard at the UC Santa Barbara Library.

Bill developed a passion for rare recordings as a young boy. By the time he was a teen, he had amassed a collection of early opera recordings. Bill attended Stanford and became a successful geologist. Throughout his career, he made time to explore the voices of the past. He hunted for recordings in small shops all over the world during his travels as the vice president of Union Oil's Minerals Exploration Corporation. Bill published his research in "The Encyclopedic Discography of Victor Records" with collaborator Ted Fagan in 1983.



Through his work as an independent scholar, Bill came to appreciate the UC Santa Barbara Library's own collection of rare recordings and commitment to make each piece accessible. After discussions with performing arts curator David Seubert, and in partnership with his attorney, Bill created an estate plan that left his meticulously catalogued collection to the library.

The Moran estate plan outlined several legacy gifts established upon Bill's passing. Bill established charitable remainder trusts and a charitable gift annuity. The university receives the remainders, guaranteeing a perpetual stream of library support. Planned gifts not only support the beneficiaries, but also the estate itself through substantial tax deductions. Bill also planned an outright significant bequest to support and expand the discography collection in the library's Special Research Collections, creating the William R. Moran Fund for Recorded Sound.

"Bill's legacy for special collections was transformative," said David Seubert. "His generosity enabled us to significantly expand the sound recording archive at the university and gave us both leverage and negotiating power in order to strategically build our collection in a systematic way."

"Library endowments allow us to commit to the long-term building and maintenance of collections that benefit students and faculty as well as the greater community," said University Librarian Kristin Antelman.

Thanks to Bill's tireless collecting, UC Santa Barbara's Historical Sound Recordings archive is second only to the Library of Congress. Just as he desired, each piece is available to all — including teenage opera fans. William Moran's legacy will echo forward, enriching the field of sound studies and future students in perpetuity.

The Italian Renaissance in Santa Barbara

Alfred Moir Estate

Alfred Moir was one of the first history of art and architecture professors at UC Santa Barbara. Born in Minneapolis, he served in the military and retired as a Master Sergeant before obtaining his B.A., M.A. and Ph.D. in art history at Harvard University. He left Tulane University to join the fledgling UC Santa Barbara art history department in 1962. He became the chair of the department one year later and grew the department significantly through the next few years. Alfred had begun collecting drawings in the 1940s, and by the 1970s, he'd focused solely on his passion: the Old Masters.

During his tenure, Alfred brought two collections to the UC Santa Barbara art museum and published several books about the artist Caravaggio. After his teaching retirement in 1991, he served as adjunct curator for the campus art museum and as a consulting curator for the Santa Barbara Museum of Art.

When Alfred passed away in 2010, his estate provided several significant gifts to UC Santa Barbara. The Alfred Moir Fellowship in Art History established awards to graduate students studying Southern Italian Renaissance art and Old Master drawings of the 15th through 18th centuries.

Alfred donated over 2,000 paintings, drawing and prints from his personal collection to the UC Santa Barbara Art, Design & Architecture Museum. His 6,000 art and art history books enrich the UC Santa Barbara Library's Special Research Collections.

The Moir Fellows and all scholars inspired by Alfred's collections are the beneficiaries of his unending artistic legacy.



Recognition



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.

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*Deceased
 H = Honorary Alumni
 Note: UCSB graduation years for joint donors are listed consecutively,
 for example: '71/'71

2018 Legacy Circle Tea

Chancellor and Dilling Yang hosted the 17th annual Legacy Circle Tea on February 24, 2018, opening their home once again to celebrate those who have included UC Santa Barbara in their estate plans. Alumni, friends, faculty and faculty emeriti of UC Santa Barbara enjoyed a delicious buffet of tea sandwiches and mini desserts while a student jazz trio serenaded guests. The attendees heard from longtime Legacy Circle members Ralph and Irene Wilson, whose dedication to UC Santa Barbara Arts & Lectures is evident in their planned gift commitment to the program. Chancellor Yang recognized the generosity and foresight of Legacy Circle members, noting that planned gifts help ensure that the research, teaching and exceptional programs at UC Santa Barbara will continue well into the future.

If you have included UC Santa Barbara in your estate plans and wish to be recognized in our Legacy Circle, please let us know. We look forward to welcoming you to next year's tea.



Juliane Heyman and Mrs. Dilling Yang



Bruce and Susan Worster



Jean Schuyler and Chancellor Henry T. Yang



Harvey Schneider and Marilyn Lee



Irene and Ralph Wilson

Giving Options

The donors profiled in these pages used a variety of planned giving options to create their legacies with UC Santa Barbara. Advantages included significant tax benefits, additional lifetime income, and most importantly — the ability to make a difference for generations of UC Santa Barbara 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 vehicles described above or a Retained Life Estate.



To learn more about these giving options, please visit 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.



giving.ucsb.edu

Cover photo by Matt Perko