

Enduring Impact

Annual Report of Planned Giving for the Year Ending June 30, 2019

UC SANTA BARBARA



Dear Friends,

Our 2018-2019 Annual Report of Planned Giving is here and once again, we have exceeded our yearly goal for the number of dedicated donors helping to secure the future of UC Santa Barbara. We are so grateful for the generosity of those who have thoughtfully crafted meaningful legacies to benefit the university in years to come.

In this report, you'll find eight profiles of alumni, faculty, staff and friends who have created new legacy gifts to benefit UC Santa Barbara. Two of these stories demonstrate how legacies created long ago unfold to enrich our programs and students. We are grateful to the generous donors who have partnered with us to achieve their philanthropic visions.

The recognition of the importance of planned gifts as the perfect tools with which to achieve one's financial and charitable goals continues to grow. Let these stories inspire and challenge you to explore your own ideas for legacy giving. It would be a privilege to implement and steward your vision for our beloved campus.

Warmly,

A handwritten signature in cursive script that reads "Ilana".

Ilana Ormond
Senior Director, Planned Giving



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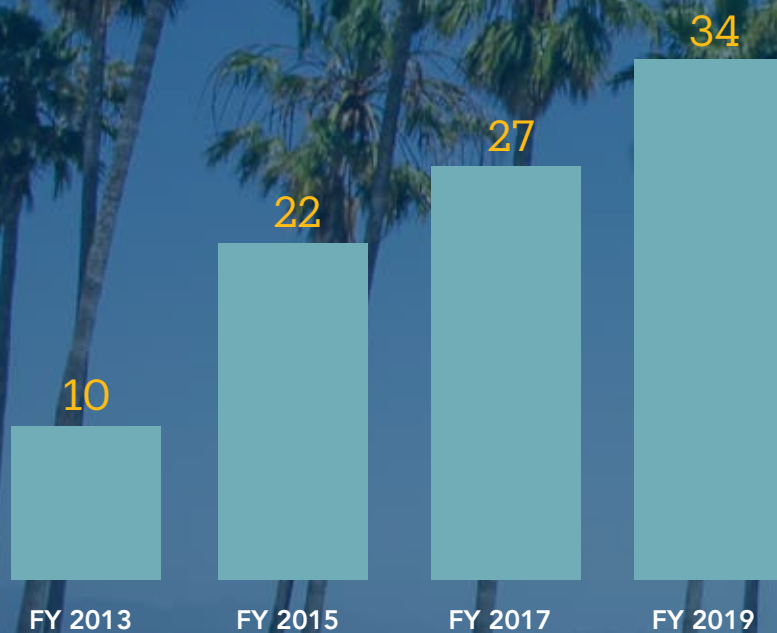
Legacy Giving

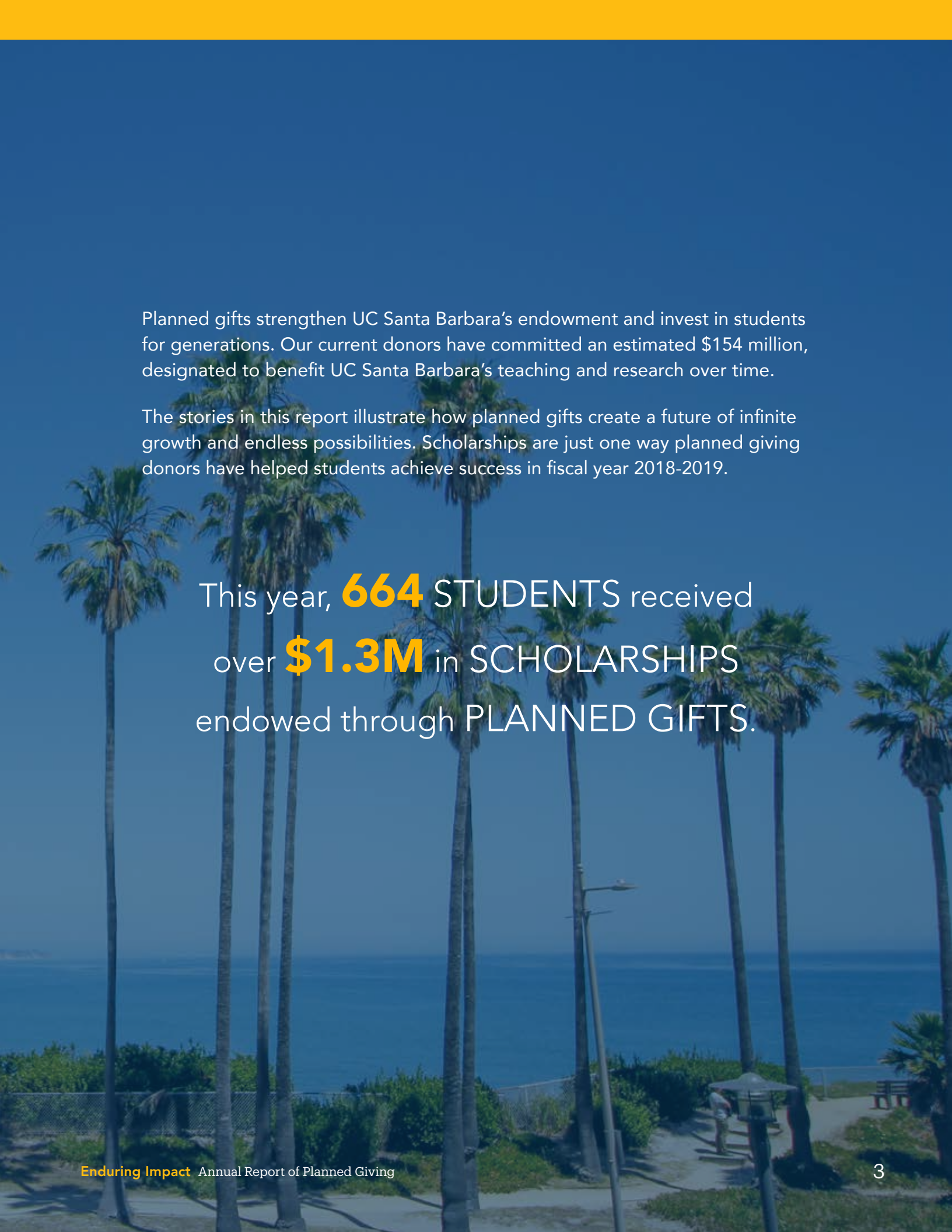
Growing Impact of Legacy Gifts

Through planned gifts, our donors craft powerful philanthropic visions, leave meaningful legacies and help UC Santa Barbara achieve excellence.

Our community of supporters has embraced the power of planned giving. The forward-thinking members of our Legacy Circle help secure a bold future for UC Santa Barbara.

New Legacy Circle Members by Year



The background of the page is a photograph of a coastal area. In the foreground, several tall palm trees stand against a clear blue sky. In the middle ground, there is a paved path with a few people walking. In the background, the ocean stretches to the horizon under a bright blue sky. The overall scene is bright and sunny.

Planned gifts strengthen UC Santa Barbara's endowment and invest in students for generations. Our current donors have committed an estimated \$154 million, designated to benefit UC Santa Barbara's teaching and research over time.

The stories in this report illustrate how planned gifts create a future of infinite growth and endless possibilities. Scholarships are just one way planned giving donors have helped students achieve success in fiscal year 2018-2019.

This year, **664** STUDENTS received
over **\$1.3M** in SCHOLARSHIPS
endowed through PLANNED GIFTS.

Stories of **Commitment**

An Audacious Adventurer

The youngest Gauchos learn and grow with help from Margaret Becker Morez



Margaret lives in a house full of art, where paintings line each surface and lean against the walls. Many are the works of her late husband, Gordon, a San Marcos High School art teacher who mentored students. As one of eight children and a beloved aunt to her nieces and nephews, Margaret shares his connection to young people. Her legacy gift to UC Santa Barbara's Early Childhood Care and Education Services will help struggling parents care for their families.

Margaret's life is as colorful as her home. She graduated from high school in Bristol, South Dakota, then joined her sister and husband in Cincinnati, Ohio, where she enlisted in the U.S. Navy. After serving in Washington, D.C., and Pearl Harbor, Hawaii, she enrolled in UC Santa Barbara with her GI benefits. Much to her surprise, the campus was a former military base. The old barracks were turned into dorms where the same bunk beds were covered in the Navy bedspreads she had just left.

After two years at UC Santa Barbara, Margaret transferred and graduated from UCLA, then accepted a job at the UCSB Library, where she quickly fit in. She joined a choir of library colleagues called the Hollybush Singers. Margaret worked in the reserve book room, the acquisitions department and the circulation department. Then the earthquake hit. The books came tumbling down, and Margaret led the organizing effort with help from library staff and student assistants. This led to her transfer to the stacks services unit within circulation.

Margaret's leadership and spark animated a long and fulfilling career of 31 years mentoring her staff and student employees, including UC Santa Barbara Foundation Trustee Rafael Costas '86. Rafael included the UCSB Library in his estate plans, and to honor his time working there, his plans include naming the new music listening room 'The Margaret Becker Morez and the Gordon Morez Music Listening Room' in their honor. Margaret continues helping future generations through her generosity to Early Childhood Care and Education Services.

"My hope is to support hard-working parents who do not have enough money to place their kids there, especially mothers who are students," said Margaret. Through her support, Margaret enriches local families in the spirit of her own vibrant life and the 22 years she spent with her husband. "I want to help parents who can't afford to have something good for their kids," Margaret said. "If you come to a point where you are lucky enough to have some money to give, you should."

A Blue and Gold Community

Rebecca and Gary Eldridge help build the future of UC Santa Barbara Athletics



When your team makes the NCAA tournament and there's no time for plane tickets, you just hop in the car, knowing your community will meet you there to cheer for your Gauchos together.

It's this community that inspired Rebecca and Gary to name UCSB Athletics as a beneficiary of their estate plan. When the Eldridges first began supporting UCSB Athletics, women's basketball hosted halftime pie raffles. While the team no longer relies on pie, practical updates to Thunderdome infrastructure like seats and locker rooms are still critical. Until recently,

a lack of lights meant that the baseball team couldn't play at night or host regionals.

"When you support a facility, you help an entire generation of athletes," said Gary. The couple's generosity will support facilities improvements for all student-athletes at the athletic director's discretion.

"I wish more people knew how incredibly talented the student-athletes are," said Becky. "It's hard to balance school, practice, games, exams and papers in a whole new environment with a new group that changes every year."

Students move on each year, but Becky and Gary remain steadfast supporters. After returning from the service in 1965, Gary resumed working as speedometer technician at Martin De Piazzi Inc., later owning the business with his father and brother. Becky was hired by Dr. Davidson himself when Davidson Library was only two stories tall, beginning a 25-year career on campus. Since retirement, the Eldridges have reflected on how they could honor the impact of UCSB Athletics on their lives.

"The most rewarding part of UCSB Athletics is socializing with other supporters," Becky said. "It's the connections with people and the hospitality."

A Gaucho blue vase filled with gold sunflowers sits on the Eldridge kitchen table, an emblem of the couple's cheerful support for UC Santa Barbara.

From Disaster to Action

The 1969 Santa Barbara oil spill galvanized Jim '71 and Laura '71 Putnam



Jim '71 and Laura '71 Putnam met fifty years ago on Del Playa beach. Since marrying in 1972, they have raised a daughter and son, run their own financial and tax advisory firm, and traveled the world from Kenya to Cambodia. Along the way, they championed the environment abroad and at UC Santa Barbara's North Campus Open Space, where their recent pledge will help restore wetlands native to the Central Coast.

The Putnams attended UC Santa Barbara in the aftermath of the 1969 oil spill that closed the beaches, devastated marine life and opened their eyes to earth's fragility. Jim enrolled in the first environmental studies class offered in the UC system, and Laura began her lifelong advocacy for animals and nature.

"We've both become divers," said Jim. "We can see what the world looks like underneath, and it's a disturbing trend."

The Putnams met Professor Emeritus Duncan Mellichamp and his wife, Suzanne, on a UC Santa Barbara sponsored trip to France. Inspired by the Mellichamp's significant support of North Campus Open Space, the couple saw an opportunity to make their own impact and are using a retirement plan to make current and legacy gifts. The Putnams' required minimum distributions from their IRA accounts are paying off a five-year pledge for the site and they have named the UC Santa Barbara Foundation as one of the beneficiaries of an IRA.

"I'm a big believer in social capital and I feel there's a responsibility to give that back. If you can leverage your contributions with tax savings, you can increase the amount you give," said Jim. The Putnams consider themselves blessed to have been part of UC Santa Barbara and a lasting community, along with their daughter Jennifer '00 and son-in-law Andrew '01.

"We met our lifelong friends in college," said Laura. "I would like to encourage others like us to give."

A Lifelong Teacher

Professor Emeritus Richard Martin still guides the next generation of chemists



Professor Emeritus Richard McKelvy Martin graduated from UC Riverside in 1959 with a bachelor's degree in chemistry. Richard and his wife, Joanne, decided to visit her hometown of Santa Barbara before they moved to the University of Wisconsin for Richard's graduate studies.

There, the couple learned that a new UC campus would be built next to the Santa Barbara Airport. They found a large site still occupied by WWII military buildings, but the potential was obvious. Richard said, "If I ever become a professor, this is where I want to be."

After his Ph.D. and two years of research as a postdoctoral fellow at Harvard University, Richard joined UC Santa Barbara in the fall of 1964 as an assistant professor of chemistry — before the chemistry building was finished the following summer. In 1967-68, Department Chair Clifford Bunton asked Richard to serve on the environmental studies formation committee.

"As an assistant professor without tenure, still building and equipping my lab and directing my young research group of grad students, I should have said no," said Richard. "But for some reason, I agreed."

At first, no one could be found to teach. With Dr. Bunton's support, Richard established the first course in environmental studies. The only available space was the Lotte Lehman Concert Hall, where Richard taught "The Physical Environment" from the stage for two years.

"My teaching and research in the Department of Chemistry spanned thirty years," said Richard, who retired in 1994. "My wife, Susan Emmel Martin, died in 1996. In 2005, I met Penny Rickling, and we married in 2007. We have had a wonderful life together, both in Santa Barbara and in our travels."

Richard was instrumental in defining two campus departments. Thanks to his bequest to the Department of Chemistry and Biochemistry, future students will have fellowships and the opportunity to help UC Santa Barbara grow.

The Architecture of History

Gil Sanchez preserves Mexican-American culture and design



Gil Sanchez's connection to the UC Santa Barbara campus developed through the UCSB Library. A renowned, award-winning architect, Gil was approached by the UCSB Library with a request to house his collection of architectural drawings, research, photographs and correspondence in the university's California Ethnic and Multicultural Archives (CEMA). Now known as the Gil Sanchez Papers, this compilation of documents illustrates Gil's long and successful career and his work preserving historic adobe buildings. Recognizing that the many special collections at the UCSB Library require funding to ensure proper curation, cataloging and public access, Gil named the UCSB Library as a beneficiary of a generous bequest in his estate plans.

Born in California to Mexican farmworkers who later worked on the construction of cargo ships during WWII, Gil became interested in art at a very young age. Following high school and a 3-year stint in the military, Gil became an architect's apprentice and studied with a variety of architects up and down the California coast. He opened his own practice in 1973 after completing the state's exam to earn his architect's license, and the firm subsequently specialized in historic restoration. Gil's wife, Daryl Allen, joined the firm, taking her own architecture courses and playing a significant role in the research required for the restoration projects.

Gil's firm has restored, rehabilitated and documented the history of more than 45 adobe buildings in the southwest. In the process, Gil has gained a reputation as a leading practitioner in historic adobe construction, with projects including the Santa Barbara Presidio and the Missions at San Juan Bautista and San Jose. He is the recipient of numerous architecture awards and was named a fellow in the American Institute of Architects, a recognition awarded to only 1,700 of the 56,000 members.

Gil, who states that his "joy is in the work," is delighted to have his collection preserved at UC Santa Barbara and is especially proud that it is housed in the CEMA archives. His generous bequest will help ensure that his remarkable legacy remains available for future generations to access for years to come.

A Wider World

Phillip Spector '72 supports teaching, research and public service



UC Santa Barbara transformed how Trustee Phillip Spector '72 engaged with the world. As a student, Phil studied abroad in England and became deeply involved with the UC Santa Barbara Department of Political Science. He created an unrestricted legacy gift for campus to help students excel far into the future.

"I believe that unrestricted gifts are generally the best," said Phil. "My unrestricted gift supports the whole university with most flexibility, and it is more permanent than my annual gifts."

After graduating from UC Santa Barbara, Phil earned a law degree and a master's in public policy from Harvard University. Phil's mentorship with political science Professor Larry Adams helped him to understand how government and policy intersect, crucial to his long career in Washington, D.C. Phil has recently retired from his law firm, Milbank, Tweed, Hadley and McCloy.

"Larry Adams made the political philosophers real and part of one's life in a way that was inspiring and exciting," Phil said. "There was, for me, an intellectual awakening from professors at UC Santa Barbara who inspired me and who pushed me to think in new ways."

Phil believes a legacy gift is part of good estate planning. He would like to see UC Santa Barbara's endowment grow to rival Harvard's, leading to more student support.

"I received some scholarships when I was at UC Santa Barbara, so giving back is important," said Phil. "UC Santa Barbara educated me and opened my eyes to a wider world."

Stories of **Impact**

A Seat at the Table

Harriet and Chuck Burke left a legacy of inclusion



In her years as a pastoral associate and campus minister at St. Mark's University Parish in Isla Vista, Harriet Burke delighted in working with youth. For Harriet, Catholicism was about social justice and how you cared for others. In the early 2000s, Harriet and her husband, Chuck, led the effort to establish an endowed chair in Catholic studies at UC Santa Barbara. The Burkes' leadership and legacy gift to campus will continue to infuse student lives with curiosity and wonder.

Harriet and Chuck's vision came to life in 2005, when Professor Ann Taves became the first scholar appointed to the Virgil Cordano Chair in Catholic Studies. The endowed chair honors Father Cordano, a Franciscan friar and pastor of the Santa Barbara Mission.

"The Cordano Chair gave me the opportunity to explore Catholicism historically and in the present," said Professor Taves. "Chuck and Harriet shared

an expansive vision that knit the study of Catholicism deeply into the department and the university in constant conversation with other traditions."

Endowed chairs are prized positions that provide ongoing financial support for enhanced research and teaching. The Burkes structured their support through a charitable remainder trust, which provided them with lifetime income and distributed the remainder to the Cordano Chair following their passing. Their leadership and positivity inspired donations from Charles Schwab, the Franciscan friars and many generous contributors.

"She had a great sense of humor, that spark of life," said her daughter Mo Lovegreen '85.

Even in her late eighties, Harriet marched for causes including Pride, Safe Parking and cancer research. Chuck and Harriet's five children, 10 grandchildren and 10 great-grandchildren knew friends were always welcome at the Burke household.

"Grandma and Grandpa saw Catholicism as a way of bringing people together, expanding our circle instead of limiting it," said Nathaniel Burke '01.

In 1973, Chuck and Harriet attended a Catholic retreat for couples. Inspired, the Burkes began facilitating marriage retreats everywhere from Fresno to the Philippines. They led by example; Harriet and Chuck were married for 53 happy years.

The Burke family has a strong connection to UC Santa Barbara: daughters Mo and Kathy, grandson Nathaniel, and grandson-in-law Miles all work on campus. They see the endowed chair in Catholic studies as an extension of Chuck and Harriet's philosophy.

"It's inclusive," said Mo. "Everyone has a seat at the table."

A Dream of Philanthropy

The Kuehl Scholarship Fund helps students excel



As a WWII Women’s Army Corps dispatcher, Mensa member, teacher and dedicated education advocate, Mathilda “Mitzi” Christensen Kuehl led a rich life. Thanks to a generous bequest from Mitzi and her husband, William “Bill” Kuehl, nearly 100 students in the UC Santa Barbara Division of Humanities & Fine Arts have received scholarships to support their education.

The disciplines that Kuehl Scholarship recipients study range from traditional areas that have been at the heart of a liberal arts education for thousands of years, such as classics, history and philosophy, to programs that are redefining the university in the 21st century, such as media arts and technology. Kuehl Scholarship recipients graduate from college with the ability to think critically and express ideas effectively.

Mitzi, who worked her way through UCLA and UC Santa Barbara as a medical secretary, always dreamed of providing a modest scholarship. During World War II, she joined the Women’s Army Corps in Washington, D.C., and was dispatched to Santini Air Strip near Hollandia, New Guinea.

After the war, Mitzi taught elementary and high school for many years. Her high school classes focused on the humanities: German, English and art. As a lifelong teacher, Mitzi understood the importance of student support.

Mitzi and Bill’s bequest is realized each year as a new class of students explores the fine arts and humanities at UC Santa Barbara. The Kuehls’ endowment ensures that future Gauchos have the opportunity to become the humanists and artists who seek to understand our world.

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.

Anonymous (39)
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*Deceased

H = Honorary Alumni

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

2019 Legacy Circle Tea

On May 18, 2019, Chancellor Henry T. and Mrs. Dilling Yang hosted the 17th annual Legacy Circle Tea in their home. This event acknowledges those who have included UC Santa Barbara in their estate plans. We welcomed several new attendees this year as membership in the Legacy Circle continues to grow. Alumni, friends, faculty and staff who have created legacies with the university dined on tea sandwiches and mini desserts while student musicians played in the background. Longtime UC Santa Barbara Foundation Trustee and Legacy Circle member Jan Alpert '68 spoke fondly of her time as a student and her desire to give back both through volunteer and philanthropic roles. Chancellor Yang recognized the increase in Legacy Circle numbers and noted that the legacies established by planned gift commitments will provide support for the research, teaching and exceptional programs at UC Santa Barbara well into the future.

If you have included UC Santa Barbara 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.



Chancellor Henry T. Yang



Professor Emeritus Güenter & June Ahlers and Mrs. Dilling Yang



Trustee Jan Alpert '68



David (D.J.) Posley '09, Danielle Posley, Mrs. Dilling Yang, Harriet Sharp and Thelma Mead



Trustee Howard '82 & Lisa '82 Wenger

Giving Options

The donors profiled in these pages used a variety of planned giving options to create their legacies with UC Santa Barbara. Advantages include 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, Senior Director of Planned Giving**.
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