



Annual Report of Planned Giving
for the fiscal year ending June 30, 2023

UC SANTA BARBARA

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Dear Friends,

It is with great pleasure that we present UC Santa Barbara's 2022-2023 Annual Report of Planned Giving. We had an exceptional year as interest in the creation of planned gifts increased significantly. The new stories profiled in this year's report highlight a variety of legacy commitments to a wide range of UC Santa Barbara programs and departments and illustrate the numerous opportunities available through planned giving.

We remain indebted to the dedicated alumni, faculty and staff, and community friends who have already designated their legacies to support campus. The growth in the number of planned gifts to UC Santa Barbara continues to ensure a bright future for the university and the generations of students to come. Hopefully, as you read through this report, you will find yourself inspired by these thoughtful individuals.

We encourage you to reach out and let us know if you've created your own commitment to the university. We'd be delighted to welcome you to the UCSB Legacy Circle, even if you choose to remain anonymous. It is an honor for us to steward such meaningful legacies, and we are grateful to all who have shared their love of UC Santa Barbara through estate gifts.



A handwritten signature in black ink that reads "Ilana". The signature is fluid and cursive, with a large initial 'I'.

Ilana Ormond
Senior Director, Planned Giving

Legacy Giving

Growing Impact of Legacy Gifts

Through planned gifts, our generous supporters realize impactful philanthropic visions and create lasting legacies. Planned giving is a commitment by donors to contribute to our institution, whether during their lifetime or in the future, as part of their financial or estate planning. This encompasses a variety of giving options, including bequests, charitable trusts, appreciated assets, real estate, retirement plans and life insurance policies. These commitments are instrumental in helping UC Santa Barbara to fulfill its mission. Our dedicated community of supporters embraces the potential of planned giving, and the members of UC Santa Barbara's Legacy Circle help advance the university's research, teaching, and public service.

\$107.3 Million Total Gifts Raised

FY 2022-2023

Gifts from
Individuals



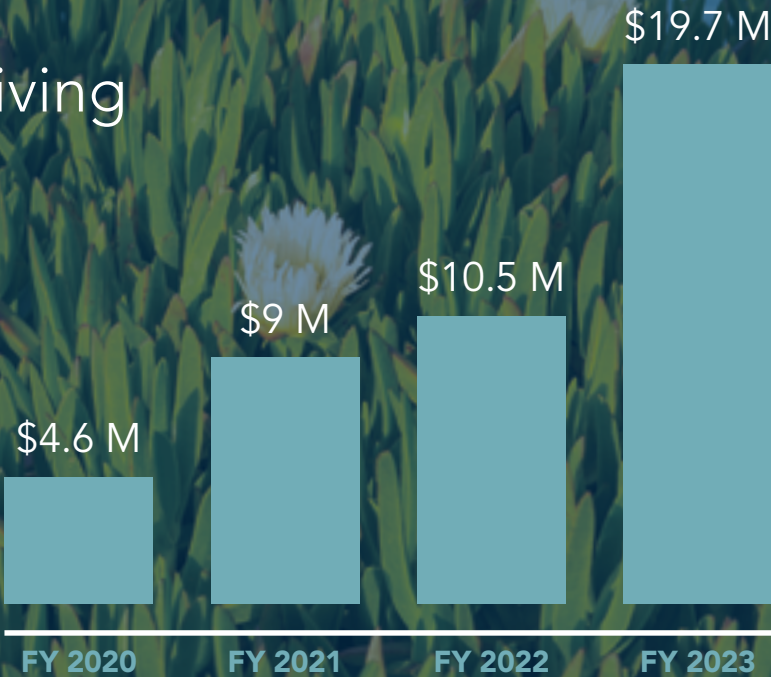
35%

Planned Gifts

65%

Outright Gifts
and Pledges

Planned Giving
Totals



Donor support
gave me a direct
pipeline to the
resources and
community that
I needed.

”

Lizzie Loredó '24



Commitment

A diver in a kelp forest. The diver is wearing a black wetsuit, a mask, and blue fins. They are holding a long, thin pole. The water is clear and blue, and the kelp is green and yellow. The diver is positioned on the right side of the frame, looking towards the left. The kelp is dense and fills most of the background and foreground.

Protecting Ocean Forests

Helen Hansma '75 sees kelp as a key to a healthier planet

Helen Hansma '75, associate adjunct professor emerita, is the granddaughter of a botany professor; plants are in her genes. After a prestigious career as a biophysicist, Helen found herself returning to her lifelong fondness for kelp. Her bequest to support kelp research at UC Santa Barbara will help provide the resources needed to monitor and protect these critical marine forests.

In 1975, Helen received her Ph.D. in biology from UC Santa Barbara. She is proud to have been renowned Professor Ching Kung's first graduate student and an early innovator in biological atomic force microscopy. Helen is known for her work proposing that life on Earth may have begun between mica sheets. Behind a dissecting microscope, examining mica pieces that she was splitting into sheets, Helen had an epiphany.

"As I looked at the bits of green algae and brown crud at the edges of the mica sheets, I thought, 'this would be a good place for life to originate,'" Helen said in a National Science Foundation feature.

A recent letter to the editor in Science Magazine prompted Helen to dive into the field of kelp. Already a UC Santa Barbara donor, she looked to campus to find a way to invest in this passion. That led Helen to discover the Caselle lab.

The Caselle lab has been monitoring kelp forests in California for over 25 years. The team leads large spatial-scale and long-term studies resulting in datasets that illustrate how kelp forests change over time and affect the planet.

“Ever since I was a Ph.D. student here, UC Santa Barbara has been a phenomenal center of expertise in marine science. Fast forward to today and we have some of the leading experts in kelp and kelp forest ecosystems. The work that we do here is based on fundamental ecological underpinnings. The questions we ask are so relevant to society now,” said faculty researcher Jenn Caselle ‘97, marine ecologist and principal investigator.

Kelp is in big trouble around the world, but especially in California. Between 2014 and 2016, an unprecedented marine heat wave decimated kelp forests across the state. Following that loss, the Caselle lab embarked on a project to guide California kelp restoration. The project includes public models and frameworks — like flowcharts and maps — that scientists can use to identify high-priority restoration sites.

“Kelp restoration research is in its infancy. With Helen’s estate commitment, we will be able to continue our work towards identifying the locations and methods that are more likely to achieve successful restoration of kelp forests across the state. This kind of support encourages our continued commitment to using the best science with the aim of managing and protecting marine ecosystems,” said faculty researcher Anita Giraldo Ospina.



“Gifts like Helen’s provide labs with unrestricted possibilities. Things in our ocean are changing so quickly. We need solutions and we need them fast. A gift like this allows us to be really nimble in our science. It allows us to pivot quickly toward solutions,” said Caselle.

As a scientist herself, Helen understands the transformative nature of research support. Her thoughtful bequest will continue the legacy she has begun with the Caselle lab.

“I’m happy to be giving to UC Santa Barbara, which has been such a big part of my life. I hope this gift can make the globe healthier,” said Helen.



To Germany and Back Again

Studying abroad becomes more accessible, thanks to Jim Maloney '84

Jim Maloney '84 traveled to Germany this summer with his husband, Andrew, for a special reunion: the 40th anniversary of his study abroad experience. Thirteen of his classmates gathered in Göttingen to celebrate the milestone. Inspired by that junior year abroad, Jim became a strong advocate for the UC Santa Barbara Education Abroad Program (EAP). He has named UCSB EAP as a beneficiary in his estate plan to continue helping students have that same transformative experience.

UCSB EAP, now celebrating its 60th year, has sent over 20,000 students to study in countries around the world. With the highest EAP enrollment across all UC campuses, UC Santa Barbara provides a robust program that partners with universities worldwide to make studying abroad accessible to all students.

As a student interested in a Foreign Service career, Jim found his savings \$1,500 short for his trip to Germany. His great-aunt, a former schoolteacher and Indiana state legislator, loaned him the money. Jim repaid that loan and then found a way to pay it forward. Fifteen years ago, he established the first named UCSB EAP scholarship.

"At first, I gave a scholarship of \$1,500 because that was the amount that I needed to study abroad. I've been giving more every year since in both my and my husband's names. It's incredibly meaningful to me," said Jim.

Jim had always wanted to travel for work. He achieved his wish through his 30-year career in international transportation, first for a shipping line, then an airline, and finally for the Port of San Francisco.

Dylan Gardner '25 had also envisioned an international future for himself. One of six children, most of whom were also in college, he worked two jobs to ease the burden on his parents. Dylan dedicated his time to studying German language, culture and history.

"I became so set in my desire to study abroad that it seemed definite. That is, until I remembered that in all my preparation, none of it could allow me to study abroad if I didn't have the funds," said Dylan. "My dream of studying abroad that had felt so close was now further away than ever... until I got the scholarship email."

Thanks to the Jim A. Maloney & Andrew Nance Scholarship, Dylan will be studying abroad for a year at Freie Universität Berlin in Germany.

"I truly am so grateful, and I am inspired to hopefully show the same generosity to someone else in time," said Dylan.



Jim is now chair of the UC Santa Barbara EAP Ambassadors Group, on which he has served since 2012. Ambassadors share their collective expertise, personal and professional networks, and philanthropic support to help students study abroad.

"In the long run, I became an ambassador after all! I didn't realize it would be through UC Santa Barbara rather than the Foreign Service," Jim joked.

EAP students keep their experiences with them for life, returning home with broader perspectives and an enhanced ability to connect. Now in his retirement, Jim facilitates restorative justice work with inmates at San Quentin State Prison, where he helps coach the 1,000 Mile Running Club.

"Studying abroad made me comfortable in unusual settings with new people," Jim said. "The ability to remain open in new situations is rooted in my study abroad experience. I've taken this confidence to many places."

An Important Place

The late Fred Hock established UC Santa Barbara's first unrestricted endowment

When Frederick Charles Hock Jr., father of three Gauchos, passed away in 2022 at age 83, he left an estate gift to the university that shaped his children's lives. The generosity of the Hock family established the first unrestricted endowment at UC Santa Barbara.

Fred and his wife, Beverly, had three children: Kimberly '89, a teacher; Kristi '91, a physical therapist; and Kirby '94, an attorney.

"He was proud of his children. We all graduated from college in four years and became people whom he liked and respected. This endowment is my father saying: thanks, UC Santa Barbara, for helping my kids," said his son Kirby.



Fred was a fourth-generation and lifetime San Francisco Bay Area resident who only left to serve in the Army in Germany. He believed in education. In addition to UC Santa Barbara, Fred supported his alma maters, UC Berkeley and the Menlo School, throughout his life. He and his children feel connected to the Bay Area; attending college and graduate school was the only time any of them lived away.

“More than once, my dad said, ‘I should have bought a place in Santa Barbara! I would have saved money on rent,’” said Kirby.

Fred was a property manager and real estate investor at the company that his grandfather had created, F. C. Hock Properties. When Fred retired, Kirby took over the family business.

“Having been his executor, I was repeatedly impressed with his planning. He had attorneys and brokers, but he made the final decisions. It was a grand, overarching plan of his to take his IRA and give that money back to the educational institutions that affected his life. Of course, it was the smartest way — he would recognize that.”



Fred named UC Santa Barbara as a beneficiary of his retirement plan. The Hock family chose for the resulting endowment to be unrestricted, which means that it can sustain any part of the UC Santa Barbara experience at the discretion of campus leadership.

“I trust that UC Santa Barbara will put the money where it needs to go,” said Kirby. “My sisters and I pursued various majors and activities on campus. My father saw how the university helped his three different children. He wanted to empower the university to do that for other children, and in the best way it could.”

When each of his children graduated from UC Santa Barbara, Fred gave them a lifetime membership to the UC Santa Barbara Alumni Association. It was his way of showing Kimberly, Kristi and Kirby that UC Santa Barbara was an important place — for his whole family.



A Study in Service

One young couple's early commitment to their alma mater

Sherlock the tortoise is the beloved pet who inspired Prathibha "Sewwi" Madigapola-Liberty '14,'15 and Taylor Liberty '14 to write their estate plan at the early age of 29. Tortoises can live for 80–150 years, and the Libertys wanted to ensure that Sherlock had a safe future should he outlive them both. After designating a Malibu tortoise reserve as Sherlock's home when the time came, Sewwi and Taylor divided the remainder of their estate between their two campus passions, UC Santa Barbara's Teacher Education Program at the Gevirtz Graduate School of Education (GGSE) and the Department of History of Art and Architecture.

"I don't think there was any question of it going anywhere else but UC Santa Barbara," said Sewwi.

The Liberty family includes dogs, cats and a former classroom pet hissing cockroach. With her love of pets both household and exotic, it's no surprise that Sewwi majored in zoology and minored in science education. As a student, she earned the Vernon I. Cheadle Award for Service for her volunteer efforts with the Cheadle Center's Kids in Nature (KIN) outreach program. That work inspired her to pursue a teaching career.

"GGSE felt very family-oriented. The faculty saw what I could contribute as a student in the Teacher Education Program and as an educator," said Sewwi, who taught for several years at a school that served youth with special learning needs.

In the yearlong Teacher Education Program, candidates earn a California teaching credential and can concurrently earn a master's in education. The program focuses on constructive relationships, immersion in a full year of supported student teaching, and fieldwork that unites theory and practice.

This year, Sewwi launched a company that provides a holistic approach to academic support through the integration of social emotional learning, high-interest materials and outdoor education. Learn with Ms. M. involves students and their parents, with consultations on at-home academic strategies, support for receiving special education services through school, and advocacy work at IEP meetings. Inspired by her time at GGSE and KIN, Learn with Ms. M. reflects Sewwi's passion for making a positive impact on students' lives.

"While many teacher candidates receive some funding to cover their tuition, they are unable to cover living expenses as this intense one-year program requires full days at school sites and evenings spent in classes, precluding them from working. We are thankful for the legacy gift from the Libertys and other private fellowships that we can award to candidates with the greatest financial need. Private fellowships help to

close the opportunity gap for students in K-12 schools by supporting the Teacher Education Program in preparing high-quality teachers who represent the diversity of California's schools," said Director Victoria Harvey.

The Libertys' legacy gift, which was created through a living trust, represents both halves of their UC Santa Barbara experience.

"My classes at UC Santa Barbara really opened my eyes to how large and small decisions made in the built environment affect our daily life. I continue to apply the knowledge I gained every time I step into a new building, whether during my travels or while showcasing homes to my clients," said Taylor.

Taylor's love of architecture led him to switch majors from engineering to art history. The field gave him a new appreciation for the built environment. On a family trip to Spain, Taylor shared insight into the landmarks and cathedrals they toured. Taylor now works as a biller for a law firm and is building a real estate and notary practice.

"Donor support to the Department of History of Art and Architecture helps to provide essential resources and opportunities for students, enriches their educational experience, and prepares them for successful careers. It enables the department to offer specialized emphases, foster groundbreaking research, and promote inclusivity. The Libertys' gift will shape the field's understanding of visual culture," said Professor Laurie Monahan, department chair.

The Libertys want to inspire their peers to consider planning early.

"We only have this one life," said Sewwi. "As millennials who do not have kids, we want our wealth to help people. We feel like our time in college made us the people we are today. It is meaningful to make that experience more affordable for someone else."



Scientists Lead Us

Sandra Denhart '73 supports oceanography and neuroscience in memory of her parents

Katherine and Donald Denhart raised their family between a ranch in South San Jose and on their property in Oahu. Their daughter, Sandra Denhart '73, remembers a childhood of swimming, surfing, snorkeling and caring for the land's resources. In honor of her parents, Sandra has named UC Santa Barbara as a beneficiary of her estate to support coral reef conservation and Alzheimer's research on campus.

"I think I learned to swim before I started walking," said Sandra. "I enjoyed competing in sailing regattas with my family and as a member of the sailing team for UC Santa Barbara. It was through my parents and extended family that I learned the need to care for the ocean and our environment."

UC Santa Barbara's environmental and marine ecology research extends far beyond California. Faculty and researchers lead projects around the world, including several to improve the health of coral reef ecosystems in Hawaii and other parts of Polynesia. From assessing climate change impacts on coral reef systems to leading the Mo'orea Coral Reef Long Term Ecological Research program, UC Santa Barbara scientists are conducting leading coral research and preparing the next generation of marine ecologists.

“Coral reefs are some of the most imperiled ecosystems in the world. This gift helps ensure that UC Santa Barbara scientists are leaders in the field of coral reef science and conservation. Healthy oceans help create a healthy planet,” said Deron Burkepille, professor of Ecology, Evolution & Marine Biology and Mo’orea Coral Reef investigator.

“It is important to protect our ocean resources and this cannot be achieved without dedicated, talented scientists that continuously seek better ways to support our environment,” said Sandra.

In addition to coral reef ecosystems in Polynesia, Sandra is also honoring her parents by dedicating a part of her bequest to neuroscience research.

“My mother passed away from Alzheimer’s, and my father passed away from Parkinson’s,” shared Sandra. “After caring for both parents, and with much of my own career in biotech, I realized that I wanted to dedicate a part of my estate to marine ecology and neuroscience research.”

UC Santa Barbara neuroscience researchers fight the death of brain cells. With stem cell research, image informatics, electrophysiology, computer science and molecular biology, scientists study the process of aging. Highly collaborative researchers are developing new technologies and approaches to investigate brain function, brain disorders, and potential therapies for neurodegenerative disease.

“Even a brief visit to my lab will make the enthusiasm of our team obvious,” said Professor Ken Kosik, Harriman Professor of Neuroscience and co-director of the UC Santa Barbara Brain Initiative. “Fighting the challenge of neurodegenerative diseases, and easing the hardships that those affected endure, is a team of students and fellows who are undaunted by any obstacle. Using advanced molecular and cellular technologies, sophisticated computer algorithms, and very large databases, we cannot help feeling a sense of optimism that our work will have a significant impact.”



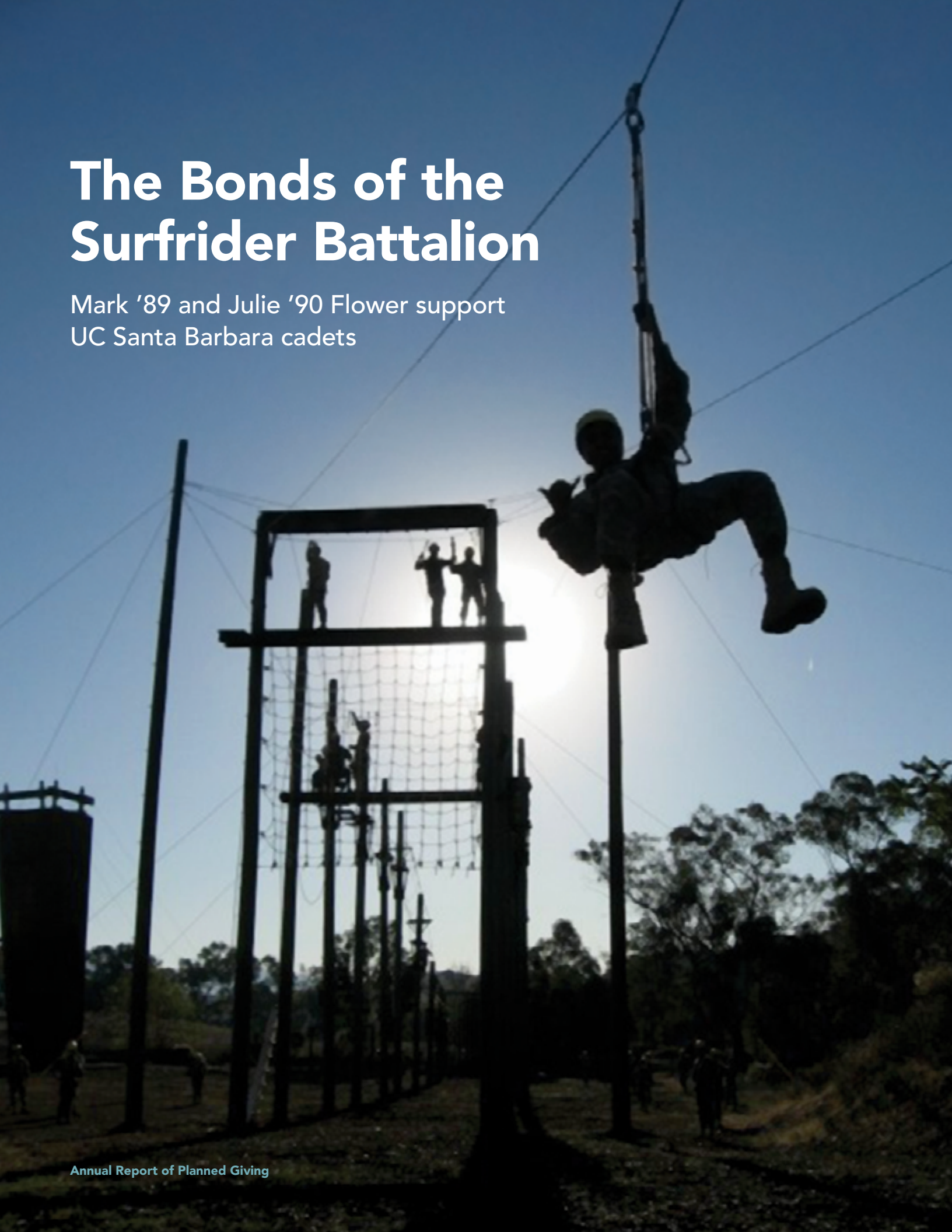
Sandra emphasizes the importance of strong partnerships in estate planning. She developed her estate plan in partnership with a trust attorney and a wealth manager who call themselves ‘Team Sandra.’ The result is a personal and heartfelt legacy that will honor her family.

“I really feel very much at peace having come to this decision,” said Sandra. “I feel that my estate gift will truly make a positive difference in these fields.”



The Bonds of the Surfrider Battalion

Mark '89 and Julie '90 Flower support
UC Santa Barbara cadets



UC Santa Barbara's U.S. Army Reserve Officer Training Corps (ROTC) program is home to the Surfrider Battalion, where Mark '89 and Julie '90 Flower fell in love during their Army ROTC years. Army ROTC bonds its participants tightly through intensive leadership training. It shaped the Flowers' personal and professional lives, and in return, they have given back by naming UC Santa Barbara Army ROTC as a beneficiary in their estate plans.

Army ROTC provides educational opportunities by combining leadership and management theory with hands-on experience. A demanding and academically rigorous program, UC Santa Barbara Army ROTC is nationally recognized as a top unit. The program began in 1947, when all incoming freshmen and sophomores were required to become cadets. In 1962, compulsory enrollment ended and the voluntary Cadet Corps began. The Surfrider Battalion's mission is to recruit and retain quality cadets and develop them physically, mentally and emotionally into officers worthy of leading our nation's soldiers and commanding the army of the future.

"We feel deeply connected to ROTC," said Mark and Julie. "The lessons we learned — assessing situations, determining the mission, focusing on operations, and handling logistics — apply to all situations and helped lead us to success."

Mark, who was born in the Bay Area and grew up in Michigan, learned about ROTC scholarships when looking into West Point. He applied and was selected as the recipient of an ROTC scholarship, which allowed him to attend any school with an Army ROTC program. He promptly chose UC Santa Barbara. Julie, whose father attended West Point, discovered the program two years later as a junior after a military science course piqued her interest.

Mark and Julie share many memories of their time on campus, including meals at Pizza Bob's in Isla Vista after field training. Their wedding proposal took place at the local Beachside Café while they were still students. After graduation, they moved to Hawaii, where Mark served on active duty.

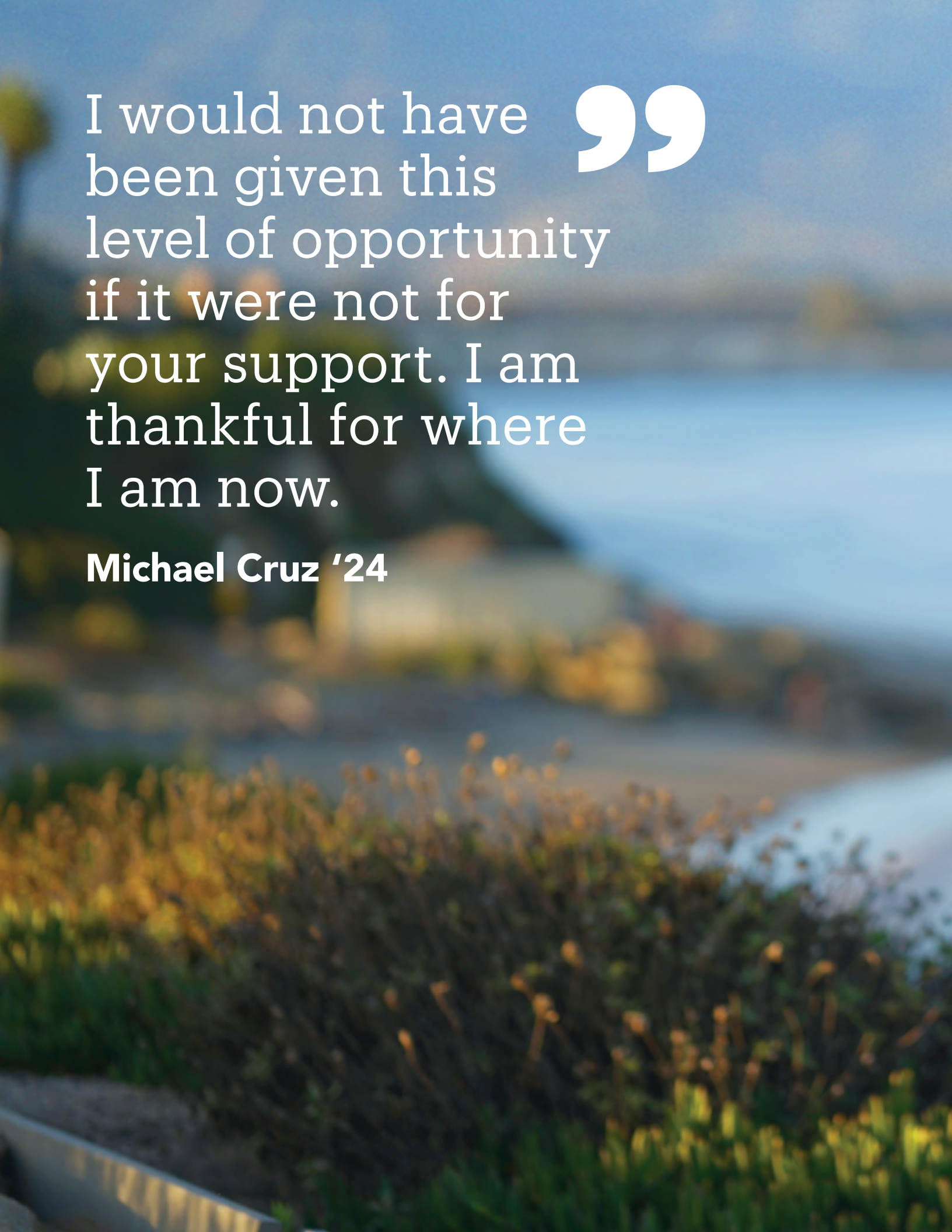
In 1993, the Flowers moved to the San Francisco Bay Area, where Mark eventually became a wealth advisor and served on a number of nonprofit boards. Julie attended Airborne school, served in the Army Reserve in Oakland, and spent 15 years as a flight attendant for United Airlines. The couple have three children: Max, Jojo, and Samantha '17, who also attended UC Santa Barbara and is the mother of their first grandchild.

"We were so excited that Sam chose the university that brought us together and gave us so many wonderful memories," said Mark.

The Flowers' planned gift will support UC Santa Barbara in two ways. It will create a scholarship endowment that will help provide financial assistance for ROTC participants. Separately, it will also provide flexible support for campus. This is a foresighted decision that trusts UC Santa Barbara leadership to respond to needs and opportunities as they arise, a nimbleness that helps our campus retain its standing as a top public university.

"By investing in the Department of Military Science and Army ROTC program, the Flowers help our cadets devote their time and energy to their studies and training. Their gift is a powerful encouragement. We are grateful for supportive alumni like Mark and Julie, who go above and beyond to support our program and help our cadets achieve success," said Patricia Dent of the Department of Military Science.





I would not have
been given this
level of opportunity
if it were not for
your support. I am
thankful for where
I am now.

”

Michael Cruz '24



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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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 \$250,000. 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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