

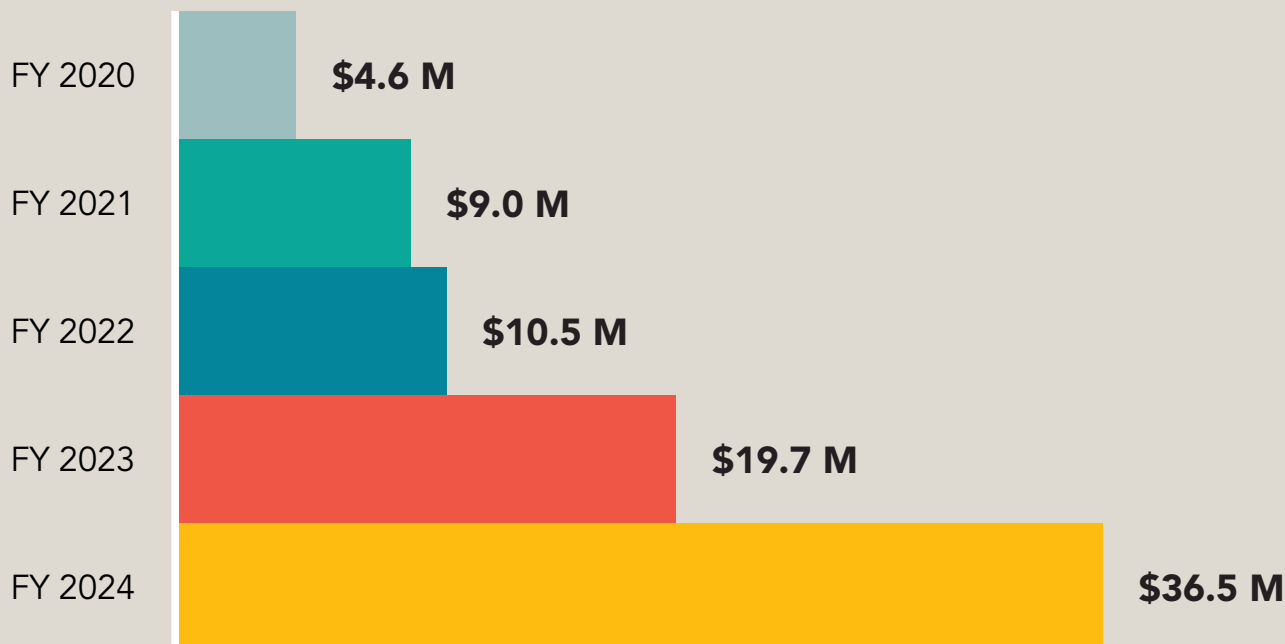
LEGACY GIVING

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.

Planned Giving Totals

Fiscal Years 2020-2024



Out of \$167.3 million raised in fiscal year 2024, \$106.3 million was through the generosity of individuals. Planned giving commitments, which totaled \$36.5 million or 34% of individual giving, 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.

\$106.3 Million

Gifts from Individuals



\$69.8 M
Outright Gifts
and Pledges

\$36.5 M
Planned Gifts

COMMITMENT



'Chomaha!'

John Davis (JD) '82, '84 makes UCSB Baseball's first legacy commitment



Friends of John Davis (JD) '82,'84 will tell you he is a baseball fanatic.

A UC Santa Barbara Foundation trustee, JD has worked closely with UCSB Athletics for the past 13 years and is dedicated to UCSB Baseball. In 2021, he helped launch the Chomaha Fund to rally community support for the team. His sports facilities support over the years has made an impact on the game experience for the fan — but more importantly, for the baseball player who dedicates time and energy to UC Santa Barbara. JD designated a bequest for UCSB Baseball to prove he would be there for the team “through thick and thin.”

“For whatever reason, I had assumed that the private support raised was beyond what was needed to operate athletic programs. That’s far from the truth. It became quickly apparent to me that for this program to excel, it needed to raise more,” said JD.

That’s when he named UCSB Baseball as a beneficiary in his estate plans and encouraged others to do the same.

“I knew how important it was to Coach Andrew Checketts to see commitments from people like me in the community,” said JD. “I wanted to make sure he knew that we were going to be here to help raise more money for UCSB Baseball than has been raised in the past.”

Checketts joined the Gauchos as head coach in 2011. During his tenure, the Gauchos have won three Big West Championships and represented the community on the national stage at seven National Collegiate Athletics Association (NCAA) Regionals. In 2016, the team reached their first-ever College World Series, held annually in Omaha, Nebraska. ‘Chomaha’ became the Gauchos’ rallying cry. The team had a banner season in 2024. UC Santa Barbara competed in and hosted NCAA Regionals on campus, and with a dominant conference campaign of 26-4, the Gauchos won their third Big West Championship in the last five years.

“JD has been on the ground floor with us since I got here,” said Checketts. “He built relationships with his friends when I needed help connecting in

the community. He was able to not only support the program himself but also help us expand our donor base and our network. JD’s legacy gift helps us achieve two goals, sustainability and growth. And, he loves the game; we get to break it down together.”

As a student, JD played intramural sports. He was inducted into the Intramural Hall of Fame twice, for flag football and basketball, and continued to play well into his forties.

“Sports teach young adults how to get along with not just the best player, but also the ones that need help. I credit UC Santa Barbara not only for my academic education but also for my social education,” said JD.

After graduating with his master’s in mechanical engineering in 1984, JD joined the Santa Barbara Research Center of Hughes Aircraft. He would work there for over 30 years as it became General Motors and then Raytheon.

“I was in management for the last 20 years of my career,” said JD. “I interviewed hundreds of engineers over the years, and I knew they were all smart enough. What I wanted to know is: Can you communicate? Can you get along? Can you lead?”

He admires UCSB Baseball players for these qualities. Current UCSB Baseball pitcher Frank Camarillo '26 is a recipient of JD’s scholarship support.

“JD’s scholarship helps me be the best I can be for this program and for UC Santa Barbara. I’m grateful for JD, who’s always supporting me. I even played summer ball here with the Santa Barbara Foresters, and he’s there helping out, too. It’s made my experience easier and much more fun. He’s helping me live out my dream,” said Frank.

This is Frank’s third year on the team and the first year he is eligible to be drafted for Major League Baseball, which is his goal.

“I’m very proud of our student-athletes when they move on and represent UC Santa Barbara out there in the community,” said JD.

An Intellectual Home

Jennifer Ho '92 supports Asian American scholars

Jennifer Ho's first Asian American studies class was a confluence of stories.

"I vividly remember learning about a little-known refugee relief act passed by Congress," said Jennifer. Originally designed to support communist refugees from Eastern Europe, the act was later amended to include quotas for Chinese refugees. "When I realized that law allowed my father's family to leave China and come to the United States, my mind just exploded."

Another pivotal moment came when she read Maxine Hong Kingston's "The Woman Warrior."

"I'd never encountered Asian American literature in my public library or K-12 education. That book gave me the confidence to pursue a line of study that I have felt enriched by every day of my life," said Jennifer.

Jennifer would go on to take many Asian American studies classes offered at UC Santa Barbara. She is now the director of the Center for the Humanities & the Arts at the University of Colorado Boulder, where she teaches classes on Asian American culture and Critical Race Theory. Jennifer is active in community engagement around issues of race and intersectionality, leading workshops on anti-racism and how to talk about race.

Motivated by a desire to advance the field, Jennifer hopes her bequest to UC Santa Barbara's Department of Asian American Studies will provide stability and flexibility for the department by allowing the chair to address pressing needs.

"For the department to be able to count on this legacy commitment to support our future graduate emphasis students year after year is a gift that keeps giving, indeed," said erin Khuê Ninh, professor and chair of the Department of Asian American Studies.

Jennifer also supports the department with flexible current-use philanthropy.

"Dr. Ho is a UC Santa Barbara alum and former president of the Association for Asian American Studies who considers this field her intellectual home. As a professor herself, she can appreciate firsthand how vital unrestricted support is for faculty, and also for a department more broadly. With her support, students in our new graduate emphasis will be subsidized in their travel to present at the annual conference of the Association. Graduate travel funding at the university is scarce and yet these professionalization and networking opportunities are, as we know, crucial to building their careers. There is perhaps no more efficient way to positively impact both faculty and undergraduates than to uplift our graduate students, who are our research assistants and teaching assistants, respectively," said Khuê Ninh.

Jennifer plans to name the endowment after the women in her family. Her paternal grandmother fulfilled her duty to marry into wealth — later stripped away by the communist revolution. Her maternal grandmother, from a poor family, raised nine children. Neither woman had a college education. Jennifer's mother was born and raised in Kingston, Jamaica, and received a scholarship to train as a nurse in England at age 17. She returned to Jamaica as a registered nurse after three years and then immigrated in 1966 to the United States, where she met Jennifer's father.

"We don't think about the contributions of women. I want to emphasize how courageous it is to leave a country and a culture and immigrate to another place where you don't speak the language or know the customs," Jennifer said. "I'm where I am because of this foundation in Asian American studies, but more importantly, because of these influential women in my life."

Jennifer's gift to the Department of Asian American Studies will honor the contributions of the women in her family while empowering the contributions of scholars in the field in perpetuity.



Boosting Energy-Efficient Research

Dr. John Bowers supports graduate students in the Institute for Energy Efficiency

Dr. John Bowers is a distinguished professor of electrical and computer engineering at the UC Santa Barbara College of Engineering and holds the Fred Kavli Chair in Nanotechnology. He is also the director of UC Santa Barbara's Institute for Energy Efficiency (IEE), to which he has designated a legacy gift in support of graduate students.

"Graduate students leave UC Santa Barbara as successfully trained researchers in the field. They go on to solve problems of energy efficiency around the world," Bowers said. He hopes his support will increase the number of graduate students in the program, amplifying the institute's impact.

Since its establishment in 2008, IEE has led the world in groundbreaking discoveries and technologies that save energy while advancing the standard of living worldwide. Projects within each IEE research theme — Computing + Communications, Food Energy Water, Smart Societal Infrastructure — develop new technologies for improving and ensuring a more sustainable future.

Bowers' research in laser-based photonics has facilitated gains in energy-efficient data transmission. He estimates that computing is 1,000 times more efficient than it was 15 years ago, when the IEE was founded. Given the rapid growth of artificial intelligence technologies and the urgency of climate change, their work to increase the efficiency of data centers is crucial. Data centers provide AI models with computing power, and in doing so, consume vast amounts of electricity.





"Data centers are revolutionizing our society, and they can make us all much more productive," said Bowers. "The problem is that very advanced chips require a kilowatt of power each, and a data center has a million of them linked together. Using photonics rather than wire is a much more efficient way to move data throughout those kilometer-long facilities."

Increased computing efficiency is just one field of achievement for the institute. IEE provided a seed grant to Nobel laureate and professor of materials and electrical and computer engineering Shuji Nakamura to collaborate with Professors Steven DenBaars and Phillip Christopher to design new LED lasers to enhance faster, more energy-efficient catalytic processes. Computer science Professors Chandra Krintz and Rich Wolski explore how cloud computing innovations can help farmers manage crops with higher productivity and less energy output. Their lab and SmartFarm project is part of an IEE goal for renewable energy to constitute 50% of U.S. energy production by 2030 and 100% by 2050. Home electricity consumption, more efficient batteries, improvements to the U.S. energy grid, and photon-based quantum networks are more examples of the overlapping projects pursued by labs at IEE.

Bowers is excited by the efforts of IEE researchers and the graduate students who collaborate with them. Graduate students are vital to each project, and Bowers' legacy gift will advance broad research across the institute.

"If you can give back to the university, that is satisfying and needed," said Bowers. "I think we're just at the beginning of an important road to make everything in our society more efficient and sustainable."

A Legacy of Inquiry

The Leslie S. and Herbert Fingarette Endowment will support philosophy graduate students

Over his 40 years teaching philosophy at UC Santa Barbara, Professor Herbert Fingarette explored subjects ranging from Confucius to criminal insanity. His daughter, Ann Fingarette Hasse, created a legacy gift to establish the Leslie S. and Herbert Fingarette Endowment in honor of her parents, emphasizing the importance of following one's curiosity.

"That's exactly what my father did," said Ann. "He followed the path of what interested him, whether or not it was in the mainstream of philosophic thought. If you teach about what interests you, then you are much more likely to be a good teacher." Indeed, Professor Fingarette received UC Santa Barbara's Distinguished Teaching Award in 1985.

Ann's current support of the Department of Philosophy helps graduate students travel to conferences or other universities where they can meet colleagues in their field and can share their work. So far, six students have received awards. Ann is expanding this current support by donating the proceeds from the new edition of her father's ground-breaking 1972 book "Confucius: The Secular as Sacred."

"I wanted to do something in my parents' names at UC Santa Barbara, and I thought that donating the royalties would be a wonderful foundation for an endowment," Ann said.

Ann's mother, Leslie, attended UCLA in the 1940s, where she served as managing editor of the Daily Bruin — unusual for women at the time. She was also a fierce debater who won statewide competitions, and later, was a keen editor of her husband's work.

Many years from now, Ann hopes the endowment in her parents' honor will grow into a permanent travel fellowship for graduate students.

"Professor Fingarette was an award-winning teacher who brought prominence to the UC Santa Barbara Department of Philosophy through his influential scholarship on Confucius and significant issues in moral psychology, including alcoholism and the nature of the disease. His work was profound and practical, offering theoretical insights from the history of philosophy to address issues relevant to everyone. The Leslie S. and Herbert Fingarette Endowment continues this legacy by providing the department's graduate students with the support they need to present their research to an international community of scholars. This fund not only directly benefits the professional development of our students but also elevates the department and our graduate program within the profession by showcasing the outstanding work our students are presenting at top conferences," said Professor Aaron Zimmerman, department chair.

Professor Fingarette was known for his wide-ranging interests in moral psychology. He collaborated with Ann, a lawyer, on a book titled "Mental Disabilities and Criminal Responsibility." Father and daughter would fax draft pages back and forth and debate spiritedly.

Ann has followed her own curiosity in her career. From a clerkship focusing on antitrust laws in a San Francisco federal district court, she moved to a large law firm and later to Southern Pacific Railroad during deregulation when the nation's railroads had to learn to live and work under the antitrust laws. Her work in transportation law



led to an in-house counsel position with an international shipping company, where she used her railroad expertise to advise the company's logistics division; an added benefit of this move was that she learned about maritime law.

The Leslie S. and Herbert Fingarette Endowment will help graduate students follow their interests, fostering curious and passionate scholars at UC Santa Barbara.

"You have to go with what excites you: that's where all new ideas come from," said Ann. "If you follow your interests, you've got the best chance of having good things happen."



How To Nourish a Community

**The legacy of James Jimenez
will help hometown students
thrive at UC Santa Barbara**

The late entrepreneur James Jimenez was a key player in the Mexican food industry and a lifelong advocate for education. James understood the transformative impact of education from an early age. His father, a railroad worker who emigrated from Mexico, told James to seek knowledge everywhere — it was one thing he couldn't lose.

James took that advice to heart and shared it with young people throughout his life. Through the creation of a charitable remainder trust, James established pathways to support first-generation college students from his rural farming community.

James excelled academically. After struggling against discrimination to access the advanced classes offered only to his white classmates, he graduated high school in 1933 as valedictorian and received a full scholarship to Stanford University. He never enrolled, however; his wages were needed at home to ensure that his nine brothers and sisters stayed in school.

While James set aside his dream of becoming a doctor, he transferred his dream of education to his siblings, his three daughters, and the children of his community. Daughters Virginia and Barbara attended Occidental College, like their mother, and Margaret attended Cal Poly Pomona and Cal State LA. All three of his daughters would become teachers, with a combined 106 years of service as educators.

"Both our parents supported education. My mom was very involved in the PTA. My dad was fortunate to be brilliant and creative, with many patents. He realized the value of a college degree. We were very fortunate to know the power of education through him," said Virginia.

After James and his wife, Katherine, retired to a ranch in Fillmore in 1990, James became involved with local high schools. He began by providing informal scholarships.

"Dad would hear about a family who needed help and provide what that particular child needed. It started as book money and then turned into small scholarships," said Barbara. "He would take the student out to dinner, an experience my dad never had as a young man."

James first encountered UC Santa Barbara through the Early Academic Outreach Program, a state-wide college preparatory program sponsored by the University of California. UC Santa Barbara's program is unique in that it

has embedded a college site coordinator at 11 high schools. A UC Santa Barbara staff member has provided services at Fillmore High School for over 20 years.

Inspired by this work, James established a charitable remainder trust that provided income for himself and for his daughters for a term of years. When the term was complete, the remainder was distributed to UC Santa Barbara and created the James Jimenez Scholars Endowment, the payout of which will provide financial support to undergraduate students from underserved schools, with a preference for those from Fillmore High School.

The Jimenez daughters remember James as a charming and tenacious inventor. At age 50, James co-founded Electra Food Machinery Inc., drawing on his deep industry knowledge to develop equipment that quickly revolutionized fast-food production. His tortilla oven with an infrared burner system boosted output from 60 dozen to 3,000 dozen tortillas per hour. In 1975, his enchilada machine won a national design award from Food Engineering magazine. The same technology was later adapted to cook hamburgers and steaks for fast food chains.

"All of his life, he wanted to support his family and he was willing to take risks," said Barbara.

James Jimenez's passion for life, and especially for education, lives on through his daughters and grandchildren, and his legacy will provide inspiration and education for generations of UC Santa Barbara students to come.

The Global Campus

**Drs. Leslie '64,'79 and Ernie '66,'72,'89 Zomalt
help students participate in the world**



As UC Santa Barbara undergraduates, both Ernie '66,'72,'89 and Leslie '64,'79 participated in university-sponsored international programs. These experiences played a significant role in their personal development and their understanding of the mutual interdependence of our world. The Ernest and Leslie Zomalt International Education Fund was established years ago to provide scholarships for students participating in UCSB's Education Abroad Program. By permanently endowing this fund through both a bequest in their living trust as well as a Charitable Gift Annuity, the Zomalts will have a place in the journeys of countless students.

In 1962, the University of California sent Leslie to Bordeaux, France, as part of the first cohort of Education Abroad Program students. Founding director Bill Allaway believed in full immersion for one year. Leslie lived with a French family: a machinist, his wife, and two young daughters.

Leslie studied political science in France while the country elected Charles de Gaulle and dismantled its empire in Southeast Asia and North Africa. Not 20 years had passed since the end of World War II. Later, her host father joked that if he knew Leslie's last name was spelled the German way, he might have kicked her out.

"It was all a great adventure," said Leslie. "I returned to UC Santa Barbara and changed my major to history."

Ernie also witnessed historical events during his experience abroad. Along with six classmates and an advisor, he spent two months in Pakistan. The group participated in a program sponsored by UC Santa Barbara and the U.S. State Department known as Project Pakistan. Through this "people to people" program, the group met with student leaders at several universities across the country. In addition, the group helped build a shower facility for an orphanage.

"Our group raised money for the project and provided manual labor to assist the builders," said Ernie. Meanwhile, Ernie worried about his grandmother, who lived a block and a half away from the Watts Riots. On the students' final night, war broke out between India

and Pakistan over Kashmir. The next morning, they caught the last flight to leave Pakistan for months and were on their way home.

"When you return, you realize that you have to focus on the larger issues of the world along with the particular ones at home," said Ernie, who would also major in history.

Leslie and Ernie met several times on campus and then again on Leslie's first day as UC Santa Barbara's dean of student activities. Ernie, in the office next door, had started as an assistant dean that same morning. Both led distinguished careers in higher education, helping to open Cal State San Marcos in 1990. Leslie established advising services for the College of Arts and Sciences for the new university and led that area until retiring in 1999. Ernie retired as university executive vice president in 2000.

Both Ernie and Leslie have remained engaged with EAP. Leslie is a founding member of UC Santa Barbara's EAP Ambassadors Council. By establishing the scholarship while they were still living, the Zomalts have experienced the impact of their gift on students. Now, the charitable gift annuity provides the couple with dependable income during their retirement years and will provide additional funding for the endowed scholarship in the future.

"Leslie and Ernie Zomalt have been pillars of support for the UC Santa Barbara Education Abroad Program for many years, profoundly influencing its growth and success. The scholarship fund that they created in 2007 has empowered dozens of deserving students to realize their EAP dreams. Legacy gifts, in particular, provide a lasting impact, securing the program's future and enabling it to evolve and adapt to the changing needs of our global community," said Dr. Fabio Rambelli, UCSB EAP faculty director.

"Study and/or service abroad is an important function of public higher education. I hope the university continues to send large numbers of students abroad," said Leslie.

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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