

AUTUMN / WINTER 2016

Foresight

A Guide To Financial &
Charitable Gift Planning

UCSF



Virginia Kelley (left) included a bequest in her will to establish the Captain Arthur W.W. Markley Endowed Scholarship Fund in memory of her husband (above).

Virginia Kelley: A Long Life and a Long View

“My aunt was a no-nonsense woman who outlasted two husbands and all of her doctors.”

Tim Schwarzer,
Virginia Kelley's nephew

“We don't always know what inspires a gift to UCSF,” says Talmadge E. King Jr., MD, dean of the School of Medicine. “But we are grateful to people like Virginia Kelley, who, although she was little known to us in her lifetime, will help young medical students in perpetuity.”

San Francisco native Virginia Markley Kelley left a bequest to UCSF to establish the Captain Arthur W.W. Markley Endowed Scholarship Fund. Perhaps it was inspired by her medical care during a long hospitalization for uterine cancer or by the care her first husband received when he had a heart attack aboard a Standard Oil tanker in the Arctic Ocean.

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Heritage Circle Tea attendees included Elizabeth Watkins, PhD, Graduate Division Dean and Vice Chancellor for Student Academic Affairs (above right, center).

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For more information on making a planned gift, please complete and return the enclosed reply envelope, visit our website, or reach us using the contact information below.

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We encourage you to consult your attorney about the applicability to your own situation of the legal principles contained herein.

Heritage Circle Tea

On June 22, more than 70 honored guests attended the 2016 UCSF Heritage Circle Tea, hosted by Chancellor Sam Hawgood at the San Francisco Film Centre in The Presidio of San Francisco. The elegant setting was the perfect backdrop to thank Heritage Circle members for generously including UCSF in their estate plans and to update them on campus activities. Jennifer Grandis, MD, and Suneil Koliwad, MD, PhD, led a stimulating discussion on precision medicine and its current impact and potential for treating diabetes and other diseases.

If you are interested in joining Heritage Circle, or if you have included or wish to include UCSF in your estate plan, please let us know by completing and returning the enclosed reply envelope. Benefits of membership include invitations to the biennial tea and other special campus events, periodic updates on new research and treatments, and opportunities to meet preeminent UCSF faculty members.

For more information, please call the **UCSF Office of Gift & Endowment Planning at 415-476-1475** or email us at giftplanning@ucsf.edu. ■



Leon Levy, BS '57

Leon Levy, BS '57: Community Service Through Pharmacy

Things were different when Leon Levy, BS '57, began his professional life, first as a staff pharmacist and later as owner of West Coast Pharmacy on the corner of Irving and 7th. He did his own compounding, mixing chemicals with various ingredients to create elixirs, lotions, and other treatments for his customers. There was a soda fountain, where you could sip a malted milkshake while waiting for prescriptions to be filled, and you could even find a place to park!

It sounds like a simpler time, but Levy's path to get there was far from simple. Born in Frankfurt in 1932, he immigrated with his parents to the U.S. in 1938 to escape the escalating pogrom against Jews in Nazi Germany. They were sponsored by and lived with his aunt and uncle, who settled in Louisiana in 1933. The rest of his family did not survive.

"The shocker in the South was segregation," Levy says, "and if you were a refugee, you were also discriminated against." Young Leon adapted, quickly picking up English and learning not to ask questions in public about why blacks had to use separate bathrooms. After seven years, the family left Louisiana for California's gentler climes.

Living in the Sunset District of San Francisco, the 16-year-old Levy happened to walk by a pharmacy on the corner of Balboa and 18th streets. "I went in and asked if they needed any help, and that's how I got started," he says. His boss, Mr. Rae, suggested the boy consider a career in pharmacy.

(continued on back cover)

"I haven't forgotten the other pharmacists and how much they helped me out."

Leon Levy, BS '57

Leave a Legacy – Make a Difference

Through a bequest you can make a significant gift to UCSF at no cost to you during your lifetime. It can consist of cash, securities, real estate, and other property. All bequests, regardless of size, are deeply appreciated and contribute to making UCSF one of the nation's foremost academic health science centers.

To learn more about the benefits of making a planned gift to UCSF, please contact us at 415-476-1475 or giftplanning@ucsf.edu. You may also visit us online at ucsf.plannedgiving.org

When including an unrestricted bequest to UCSF in your will or living trust, we recommend using the following language:

"I give to the University of California, San Francisco Foundation, a California nonprofit public benefit corporation, (the sum of \$ _____) (the residue of my estate) (___% of the residue of my estate) to be used as directed by the Chancellor."

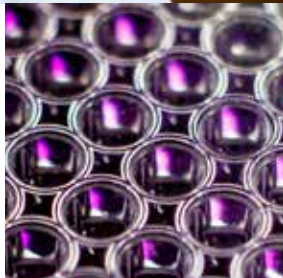
Bequests can be restricted to particular areas within UCSF, such as the UCSF Medical Center and UCSF Benioff Children's Hospitals; the Schools of Medicine, Nursing, Dentistry, Pharmacy and the Graduate Division; and for specific purposes within each of these areas, such as research, student scholarships, faculty support, and patient care programs.

Please contact the UCSF Office of Gift & Endowment Planning if you are considering leaving a bequest to UCSF to ensure that the wording you use is appropriate and accurately describes the area you wish to support.

MAKE A TAX-FREE TRANSFER TO UCSF FROM YOUR IRA

If you are at least 70½ years old, you can transfer up to \$100,000 directly from your Individual Retirement Account (IRA) to the UCSF Foundation. The amount transferred will count toward your required minimum distribution for the year but will not be included in your taxable income. Please contact us for more information on how to transfer assets directly to UCSF from your IRA.





Recent Estate Gifts

Santa Clara resident **Melba Ariani** left a specific bequest of \$3,000 to benefit the UCSF Benioff Children's Hospital San Francisco.

Lillian V. Balzarini of Redwood City left close to \$640,000 to UCSF from her living trust to be used by the Department of Ophthalmology for retinal disease research.

John G. Davis, a resident of Charleston, South Carolina, left close to \$64,000 from his charitable trust to support brain tumor research at UCSF.

Harry V. Deckert of Richmond, Virginia, designated a portion of his estate totaling \$113,658 to the Alzheimer and Memory Center at UCSF Fresno.

Ruth M. Dias of San Leandro left a percentage of her estate totaling \$76,654 to benefit Alzheimer's research at UCSF.

Sylvia Giampaoli, a resident of Oakland, left a portion of her estate amounting to \$12,142 for student scholarships at UCSF.

Former UCSF Professor and Vice Chair of the Department of Pathology **Stuart Lindsay, MD '38**, a resident of Woodside, left the residue of his estate totaling \$11,062,209 to the School of Medicine to establish a series of endowed professorships in experimental pathology.

Shirley P. Loube, a native of San Francisco, left a bequest of \$100,000 to support the cardiology program at UCSF.

Ronald D. Moskowitz, a resident of San Francisco and former San Francisco Chronicle reporter, left two \$100,000 bequests to establish named funds in the School of Medicine for the Program in the Arts and the Cardiac Electrophysiology Service. The Division of Cardiology received the remainder of his estate amounting to nearly \$6.9 million to fund The Ronald D. Moskowitz Endowment with a Heart. Mr. Moskowitz was a member of Heritage Circle.

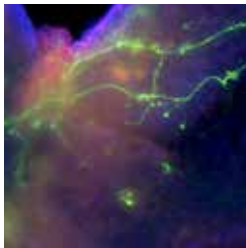
Oakland resident **Francis C. Nuccio** left a portion of his estate amounting to \$185,000 to benefit lung and prostate cancer research in memory of his parents, Frank and Sally Nuccio.

JoAnne Sackheim, a resident of Beverly Hills, California, left a specific bequest of \$100,000 to the UCSF Department of Neurology to be used for research into Pick's disease.

Former Greenbrae resident **Elsie M. Stevens** left a bequest totaling \$280,308 to UCSF for cancer and heart disease research.



Evelyn Schiess, BS '46 (seated, second from left), with fellow UCSF nursing students



Evelyn Schiess, BS '46: A Lifetime of Nursing Care

Evelyn Schiess, BS '46, graduated from Beverly Hills High in June 1941, just months before the United States entered World War II. She completed two years of pre-nursing studies at UCLA before heading north in 1943 to UCSF.

Although she would never see action, the war enabled her to get her first nursing degree through the U.S. Cadet Nurse Corps. The federal training program attracted much-needed nursing talent for the war and, from 1943 to 1948, graduated nearly 125,000 nurses. It covered all tuition and fees and provided books, uniforms, and a monthly stipend of \$15. Following her training, Evelyn took her first nursing job at Good Samaritan Hospital in Los Angeles.

"Evelyn was very bright and technically skilled," says her cousin Christine Sullivan. "She could easily have become a doctor if she had wished and her finances allowed." Sullivan's father and Evelyn were about the same age, children of an extended immigrant Austro-Hungarian family.

"It was only after she died that I began to appreciate what a full life she had," Sullivan says. "UCSF must have been liberating for her, the only child of doting parents, now living away from home in a dorm with other young women." Evelyn continued her education, pursuing

(continued on next page)

(Virginia Kelley, *continued from cover*)

“My aunt was a no-nonsense woman who outlasted two husbands and all her doctors,” says her nephew Tim Schwarzer. “We do know that she valued education highly.” She was multi-talented and played a mean game of golf and bridge, traveled all over the world, and made friends everywhere she went. “We all just loved her,” says Tim’s wife, Janine. “She was a bundle of energy, never tired, and drove like a bat out of hell.”

Arthur “Wally” Markley was Virginia’s husband, a captain in the U.S. Merchant Marine who worked for Standard Oil. She was working as a clerk in an Oakland Safeway store frequented by Markley’s mother, who suggested that the young Virginia meet her son. The two married in 1941, and Markley built their home on Barrett Avenue in El Cerrito. It had a view straight out to San Francisco Bay, to what’s now the Chevron Richmond Oil Refinery and Long Wharf, where Virginia could see his tanker come into port.

“Wally was gone at sea most of the time,” Schwarzer says, “so Aunt Ginny kept busy on her own.” She traveled on the tanker with him two or three times a year, venturing to Hawaii, Guam, Central America, anywhere that needed oil. She was on the tanker with him on New Year’s Day 1968 when he had the heart attack and died at sea.

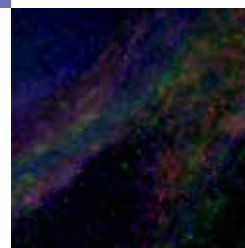
Virginia remained active and and later married Richard Kelley, a retired schoolteacher. After he died, she traveled with the Schwarzers to Italy at the age of 92 and was just as gregarious as ever, flirting with Italian men and making new friends. She continued working in the community and with the Holy Trinity Episcopal Church in Richmond, living to the remarkable age of 101. Another of her charitable bequests was to leave the church a freezer full of casseroles, which she had baked and stockpiled for church bazaars and other special occasions. ■

a master’s degree in public health and a certificate as a school nurse specialist.

Her long career included work as an operating room and office nurse, student nurse instructor, and school nurse. She retired from the Los Angeles Unified School District and continued nursing even then, caring for her parents into their later years.

“Evelyn was an adventurer,” Sullivan says. “She loved the outdoors and was an accomplished downhill skier.” She once spent four months on a solo Volkswagen tour of Europe. In 1981 she married Ernest Schiess, a neighbor who had lost his wife to cancer. A former award-winning Swiss pastry chef, Schiess introduced Evelyn to Switzerland, where her ski club happened to have a sister organization.

In her retirement, she traveled with her husband throughout the U.S. and proudly showed her championship Elkhound dogs. At the time of her death, she was still expanding her horizons by taking computerized sewing classes and German lessons and exploring her family genealogy. As a testament to her UCSF education, she left a bequest to support aspiring nurses at the UCSF School of Nursing. ■



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Dean B. Joseph
Guglielmo Jr.,
PharmD, at the 2016
School of Pharmacy
commencement



(Leon Levy, *continued from page 3*)

“He told me, you’re not going to get rich. But it’s a good living, and you’re providing a service to the community,” Levy says. He entered UCSF for a bachelor’s degree and apprenticed in a pharmacy to learn the business. If you lasted one year, you could start filling prescriptions.

“I haven’t forgotten the other pharmacists and how much they helped me out,” Levy says. Likewise, he remembers how much UCSF helped him, with tuition subsidized by the state and a solid education for a worthy profession. Last year, he established the Leon Levy and Family Endowed Scholarship Fund, which will fund scholarships for students enrolled in the PharmD program at the School of Pharmacy.

“Leon’s long and exemplary practice gives him special insight into the important role pharmacists can play in their communities,” says School of Pharmacy Dean B. Joseph Guglielmo Jr., PharmD, “and we are very grateful for his generous support of our PharmD students.” ■

