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FALL 2015

FORESIGHT

Leave a
legacy.

UCSF School of
Nursing

A Gift to Inspire Future Nurses

“I knew by age 7 that I was going to be a nurse,” says Laurel Peters, RN, MS ’77. Both her parents worked at the Mayo Clinic – her father as an immunologist, her mother as a dietician – and she found the world of science and medicine fascinating.

Laurel completed an undergraduate degree at the College of Saint Teresa in Winona, Minnesota, and newly minted as an RN, moved to California in 1972. She worked at a Kaiser Permanente hospital in South San Francisco, then joined Stanford University, where she assisted pioneering open-heart surgeon Norman Shumway, MD, PhD. She experienced many stressful life-and-death situations and, after two years, felt herself burning out.

“I thought that if I didn’t make a change, I’d be the next one on the surgical table,” she says.

Around that time, federal funds were made available to assist nurses in pursuing graduate education. She jumped at the chance to attend the UCSF School of Nursing. With her educational expenses almost completely covered, Laurel had the freedom to focus on her studies and enjoy every minute of graduate school.

“It’s a unique and remarkable time when you’re getting your higher education paid for you,” she says. “UCSF was a total joy. I loved to study, and I had inspiring teachers. I started to imagine myself as a nursing educator.”

Remembering her contented years at UCSF inspired Laurel to include a generous bequest in her estate plan for the UCSF School of Nursing to establish an endowed scholarship for students in the Masters Entry Program in Nursing.

“Our alumni know how much dedication and energy it takes to complete an advanced degree,” says David Vlahov, PhD,



Above: UCSF School of Nursing Professor Pam Bellefeuille leads a clinical simulation in the UCSF Kanbar Center for Simulation, Clinical Skills and Telemedicine Education. At left: Laurel Peters, RN, MS ’77

“This bequest is my legacy, and I’m so happy I can support future nurses in their academic achievement. I’d like the students who receive the scholarship to be able to pursue their goals without the burden of debt and other responsibilities and to feel that someone is encouraging them.”

Laurel Peters, RN, MS ’77

FAAN, dean of the UCSF School of Nursing. “I am so pleased that Laurel has extended a vote of confidence in her alma mater. Through this bequest, she will give an incredible boost to future nursing students.”

Laurel taught for five years, then earned a master’s degree in psychology and moved to Seattle. For the past 20 years she has worked for Summit Research Network supervising clinical pharmaceutical trials.

PHOTOS: Elisabeth Fall and courtesy Laurel Peters

We’d like to hear from you – For more information about making a planned gift, please complete and return this tear-off reply card or call the UCSF Office of Gift & Endowment Planning at 415/476-1475.

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Please contact me about making the following type of gift:

- ☐ Bequest
☐ Retirement Assets
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☐ Personal Property (antiques, artwork, jewelry, etc.)
☐ Stock/Mutual Fund
☐ Life Income Plan (i.e., Charitable Trust, Gift Annuity, Pooled Fund), please specify: _____

The Heritage Circle is an honorary society for those who have included a gift to UCSF as part of their estate plan.

- ☐ I have included a gift to UCSF in my estate plan.
☐ Please send me information about becoming a member of the Heritage Circle.



UCSF



Plan a gift
and make
a difference.



Ways you can make a gift to UCSF while continuing to benefit from your assets during your lifetime

Charitable Remainder Trust

A tax-efficient way to convert low yielding or non-income producing property into a diversified portfolio that provides you or a loved one with annual income

If you irrevocably transfer an asset – such as cash or appreciated property – to a charitable remainder trust with the UCSF Foundation as trustee, you and/or a loved one can receive annual income either for a set term of years (not to exceed 20) or for your lifetime. The amount of income you receive will depend on the trust’s annual payout rate, the size of the trust, and the type of trust you choose.

■ A **charitable remainder unitrust** pays out a fixed percentage of the trust’s value, as revalued annually.

■ A **charitable remainder annuity trust** pays out a fixed dollar amount each year.

On termination of a charitable remainder trust, the residue comes to UCSF to be used as you’ve directed.

Charitable Gift Annuity

Provides you or a loved one fixed payments for life and valuable support for UCSF in the future

With a charitable gift annuity you can receive a fixed stream of income (some of which will be tax-free) for

your lifetime and also be eligible for a charitable income tax deduction.

Some donors choose to fund their gift annuity now but defer receipt of payments until some point in the future, such as when they retire. This enables them to receive a current income tax deduction and also a higher annuity rate; the longer income payments are deferred, the higher the annuity rate will be.

Charitable Gift Annuity Sample Rates (Single life only)

| AGE | ANNUITY RATE |
|-----|--------------|
| 65 | 4.7% |
| 70 | 5.1% |
| 75 | 5.8% |
| 80 | 6.8% |
| 85 | 7.8% |
| 90 | 9.0% |

Bequest

A way to make a significant gift at no cost to you during your lifetime

A bequest can consist of cash, securities, or real property. You can leave a bequest to UCSF by including appropriate language (see *sample at right*) in your will or trust, or by

designating UCSF as a beneficiary of a retirement plan or insurance policy. You can continue to use your assets and can even reconsider leaving a bequest at all should your circumstances change. *In this way, a bequest can be the most flexible gift plan of all.*

If you’ve already included a bequest to UCSF in your estate plan, we thank you and hope you will let us know so that we can send you an invitation to join the Heritage Circle, our legacy society.

Sample Bequest 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.”

Retained Life Estate

You deed real property to UCSF but retain the right to continue using it for the rest of your life

A retained life estate often generates a sizeable current charitable income tax deduction and yet very little actually changes for you. You can continue to use the property as you always have, whether it is your primary residence, a vacation home, or a farm property.

For more details about any of these gifts, please contact the UCSF Office of Gift & Endowment Planning.

Tel: 415/476-1475 • Email: giftplanning@ucsf.edu • <http://support.ucsf.edu/trustsandbequests>

Consult your attorney about the applicability of the legal principles herein to your own situation.

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Daniel E. Riley, JD
UCSF Foundation
Office of Gift & Endowment Planning
University of California, San Francisco
P. O. Box 410330
San Francisco, CA 94141-9917

