

ADDRESS SERVICE REQUESTED

FALL 2015

# FORESIGHT

Leave a  
legacy.

UCSF School of  
Pharmacy

## Good Chemistry Leads to Generous Gift

Robert “Bob” DeMatteis, BS '57, got a chemistry set in his teens that put him on the path to pharmacy. “I loved the scientific nature of chemistry, but I was a people person,” he says. “I realized that as a pharmacist, I wouldn’t be stuck in a lab doing research.”

He worked in drugstores to finance his education and immersed himself in his studies. After graduating, he held various retail pharmacy positions in California’s Central Valley, where he enjoyed getting to know his patients, human and animal: One pharmacy where he worked served veterinarians, and he remembers once calculating the digitalis dosage for a pet canary with heart problems.

Bob eventually joined the Porterville Developmental Center, a state hospital for the disabled that later became a forensic hospital for psychiatric patients convicted of crimes. He was a pharmacist there for 36 years.

Having contributed faithfully to the Annual Fund for many years, Bob was eager to give back in a major way to the School of Pharmacy, which made such a difference in his life. He made a generous gift to the Mary Anne Koda-Kimble Seed Award for Innovation Fund at UCSF, which provides start-up funds to School of Pharmacy faculty members, students, and staff to support innovative projects. The fund was named for Mary Anne Koda-Kimble, PharmD '69, UCSF School of Pharmacy dean from 1998 to 2012 and co-editor of the influential 1978 textbook, *Applied Therapeutics: The Clinical Use of Drugs*.

Bob credits Dean Emeritus Koda-Kimble with influencing pharmacists and physicians to work more closely together



Bob DeMatteis, BS '57 (right), caught up with his classmate, Leon Levy, BS '57, at UCSF Alumni Weekend 2015 in San Francisco.

“I was able to go to the most prestigious school of pharmacy in the nation. I am so thankful for that privilege.”

**Robert “Bob” DeMatteis, BS '57**

as a team, and he felt her presence throughout his career. When he and his colleagues needed clinical pharmacy information, they’d ask, “Where’s Mary Anne?” and reach for her book to check the authoritative source.

“We rely on our alumni to inform the School’s vision, precept our students, and support us through their financial contributions,” says Joe Guglielmo, PharmD, dean of the UCSF School of Pharmacy and Troy C. Daniels Distinguished Professor in Pharmaceutical Sciences. “Bob has always been a terrific advocate for UCSF, and I’m so grateful for his generous gift to support innovative projects.”

Bob’s wife of 49 years, Janet, passed away in 2010. He retired in 2003 and keeps busy exercising and attending social events in his community as well as UCSF alumni events.

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.

NAME (please print)

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Please contact me about making the following type of gift:

- Bequest
- Retirement Assets
- Real Estate
- Life Insurance
- 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.

*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.

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

Q 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](mailto: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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