

SPRING / SUMMER 2016

# Foresight

A Guide To Financial &  
Charitable Gift Planning

UCSF



*Chara Schreyer with the Kippenberger  
in her Tiburon home*

## Chara Schreyer: A Gift with Heart and History

“It’s a splendid tribute . . .  
and furthers Ms. Schreyer’s  
unwavering, decades-long  
commitment to UCSF.”

David Vlahov, BSN, PhD, RN  
Dean, UCSF School of Nursing

“I’ve always been an aesthetic person,” says Chara Schreyer, who began collecting art in her 20s after studying art history at UC Berkeley. According to *ArtNews*, Schreyer owns “one of the top ten private collections of modern and contemporary art in the world.”

Among her collection is “Am Ort schwebende Feinde gilt es zu befestigen” (“Floating Enemies Must Be Pinned Down”), a striking 1984 mixed-media composition by German artist Martin Kippenberger (1953-1997). Schreyer recently included in her estate plan a bequest to UCSF consisting of the proceeds from the sale of the painting. They will be used to permanently endow the Chara Schreyer Endowed Scholarship Fund in Memory of Martha Leuenberger at the UCSF School of Nursing.

It’s a gift that comes with a lot of heart and a lot of history. Schreyer’s daughter, Justine, was diagnosed with type 1 diabetes at age 4.

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For more information on making a planned gift, please complete and return the enclosed remittance envelope, see 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.



## UCSF Heritage Circle Celebrates 30 Years

*Heritage Circle events through the years (clockwise from top right): At the Chancellor's Residence in 1994, the Peninsula Golf Club in 1999, Pacific Bell Park in 2000, the Carnelian Room in 2004, and the Palace Hotel in 2012.*

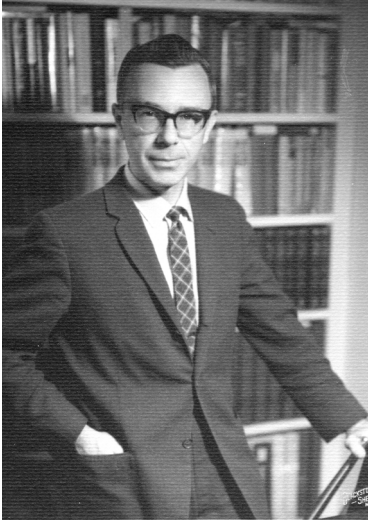
Heritage Circle was established in 1986 as a legacy society to honor alumni and friends who have included a bequest to UCSF in their estate plans or who have established a charitable life income plan.

We are deeply grateful to our more than 300 Heritage Circle members for their foresight and generosity to UCSF. Members of Heritage Circle are invited to special campus events, including a biennial tea hosted by the Chancellor.

If you have included UCSF in your estate plan, please let us know either by calling us or filling out and returning the enclosed reply card. It would be our honor to welcome you as the newest member of this very special group. For more information on Heritage Circle, please call the **Office of Gift & Endowment Planning** at (415) 476-1475 or email us at [giftplanning@ucsf.edu](mailto:giftplanning@ucsf.edu). ■







Robert T. Porter, MD '43



## Robert T. Porter, MD '43: A Legacy of Caring

As Robert T. ("Bob") Porter, MD '43, completed his medical degree at UCSF, the world was at war. His newly acquired skills were immediately put to use at the U.S. Army Hospital in Martinsburg, West Virginia, where he treated soldiers with brain injuries and psychological trauma. He cared deeply for the well-being of the soldiers in his care, and thus began a lifelong dedication to his patients and his profession.

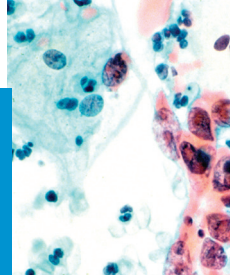
After the war, Porter spent 60 years in New York City as a child and adolescent psychiatrist on the faculty at Mount Sinai Hospital. Friends and colleagues say he was devoted to his young patients, with his dog often at his side to put kids at ease during sessions. He also was an enthusiastic mentor, always interested in helping medical students and residents become exceptional physicians.

"My uncle was truly a humanitarian," says Porter's nephew, Mark Hussman. "His patients and students were the most important thing in his life."

He had met Red Cross worker Mary Kay Thornton at the Army Hospital. They reunited and married many years later, sharing their passion for service to others and enjoying nature at their country home in Connecticut. Mary Kay passed away in 2006.

Porter died in 2014 at age 95. He always remembered that a \$200 annual scholarship had made it possible for him to attend UCSF, and he wanted to give back. *(continued on back cover)*

He always remembered that a \$200 annual scholarship had made it possible for him to attend UCSF . . .



# Ways To Give

By planning well now you can provide for yourself and/or a loved one and support the great work of UCSF in the future.

By making a gift to UCSF in one of the ways described below, you can build a more secure retirement, enjoy certain tax benefits, and have the satisfaction of knowing that your gift will help advance the groundbreaking work UCSF does every day in its hospitals, clinics, labs, and schools. While gifts of cash are most common, there are other unique ways to give that may be more affordable and in line with your personal and financial plans.

## CHARITABLE IRA ROLLOVER

Congress has now permanently extended the charitable IRA rollover provisions. As a result, individuals 70½ or older can now direct that an amount of up to \$100,000 be distributed tax-free from an Individual Retirement Account (IRA) to the UCSF Foundation. This amount will count toward the individual's required minimum distribution amount for the year in which the distribution is made. While the distribution is not deductible as a charitable contribution, neither is it treated as taxable income to the donor.

## RETAINED LIFE ESTATE

You can deed a personal residence or farm to UCSF but retain the right to live in or use it for the rest of your life.

## CHARITABLE GIFT ANNUITY

For a gift of at least \$25,000, you can receive fixed income for life, some of which will be tax-free.

### Sample Rates (Single life only)

AGE	65	70	75	80	85
RATE	4.7%	5.1%	5.8%	6.8%	7.8%

## CHARITABLE REMAINDER TRUST

A charitable remainder trust can be a tax-efficient way for you to turn appreciated property into a source of income for you and/or others, which can grow over time and ultimately benefit UCSF.

## BEQUEST

A bequest costs you nothing now but has the potential to provide significant support to UCSF in the future.

### 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."*

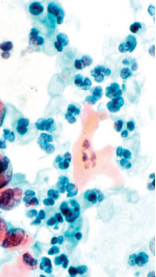
## RETIREMENT PLAN OR LIFE INSURANCE POLICY

You can name the UCSF Foundation as a beneficiary of all or part of your retirement plan assets or life insurance policy.

For more information on how to make a planned gift, please **call us at (415) 476-1475** or visit us online at **[ucsf.plannedgiving.org](https://ucsf.plannedgiving.org)**.







## Recent Estate Gifts

**Robert G. Bleier, DDS '56**, of Northridge, California, left a bequest of \$10,000 to the UCSF School of Dentistry for student support.

**Filomena Buck**, a longtime resident of San Francisco, left a portion of her estate to the UCSF Department of Pediatrics for pediatric research.

San Francisco resident **Mary E. Budiselich** left a specific bequest of \$200,000 for glaucoma research at the UCSF School of Medicine.

**Frank C. Burriesci**, a resident and native of San Jose, left a specific bequest of \$15,000 to UCSF to benefit cancer research.

San Francisco architect **Harold D. Crosby** left a portion of his estate amounting to \$7,365 to UCSF for general use.

**Olga Fairchild**, of Union City, left a bequest amounting to \$124,844 from her family trust to establish a fund in memory of her mother, Carmen Pasquel, to support metabolic research at UCSF.

**Helen W. Ford** of Lake Oswego, Oregon, left \$1,000,000 consisting of funds from an annuity, an IRA and a trust. Her gifts will fund the Helen W. Ford Endowed Stem Cell Research Fund at The Eli and Edythe Broad Center of Regeneration Medicine and Stem Cell Research at UCSF.

The UCSF Division of Neurovascular Service received \$2,167,051 from the estate of **Erich Fried**, which was used to fund an endowed professorship in his name in vascular neuroscience and to help fund a second professorship in neurocritical care.

UCSF emeritus faculty member and Heritage Circle member **Carlyn J. Halde, PhD**, left a portion of her estate totaling \$170,455 to the UCSF School of Pharmacy for student support.

Sunnyvale resident **Jennie Hemenez** left a bequest of \$26,500 for the benefit of the UCSF Benioff Children's Hospital San Francisco.

**Jeanette W. Robinson, BSN '43**, of Palm Harbor, Florida, left a specific bequest of \$3,000 for student scholarships at the UCSF School of Nursing.

**Heinz Roth**, a San Francisco resident, left a portion of his estate totaling \$114,285 to the UCSF School of Dentistry.

**Donald Wyler**, formerly of Mill Valley, California, left a portion of his estate amounting to \$315,000 to the UCSF Center for Prevention of Heart and Vascular Disease. Mr. Wyler was a member of Heritage Circle.



*Linda and Don Strough had close ties to UC, including the medical care that Don received as a UCSF patient.*



## Linda and Don Strough: A Bequest to Help Patients Breathe Easier

Linda and Don Strough had numerous ties to the University of California. They first met as undergraduates at UC Berkeley. Their daughter, Alix, received her bachelor's degree in psychobiology from UCLA and graduated from the UCSF Masters Entry Program in Nursing in 2003.

For many years, Don suffered from chronic obstructive pulmonary disorder (COPD). He was treated at UCSF by pulmonologists Michael Stulbarg, MD, and Leland G. Dobbs, MD. The Stroughs were pleased with the excellent treatment Don received, although it did not save his life. He passed away in 2007.

After losing her husband of 40 years to lung disease, Linda was determined to do what she could to help advance COPD research. She included a generous bequest in her estate in memory of her husband to benefit the UCSF Cardiovascular Research Institute (CVRI). The CVRI pursues groundbreaking research to advance the understanding of cardiovascular and pulmonary diseases and develop and test new treatments.

"My mother wanted to do something in my dad's honor," Alix says. "If my dad had qualified for new treatments or a clinical trial, we would have encouraged him to do that. Instead, we had to hope that

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"Linda said she wanted to give to UCSF because they were so good to Don when he was ill."

Bruce Bercovich,  
Friend of Linda and Don Strough



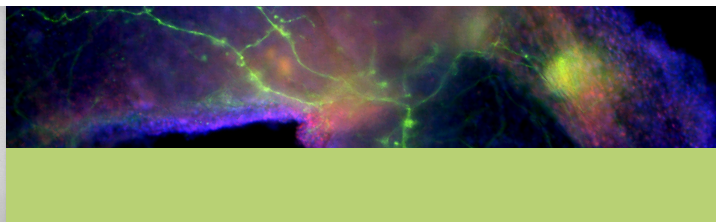
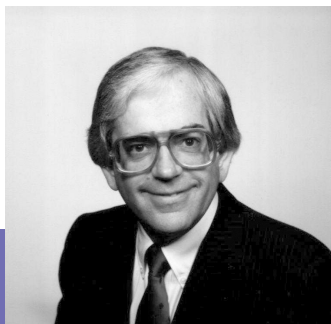


future treatments could be developed through new research.” Linda passed away in 2014 after her own battle with COPD.

“CVRI is dedicated to making new contributions to basic knowledge and clinical management of pulmonary and cardiovascular diseases,” says Shaun Coughlin, MD, PhD, director of the CVRI and Distinguished Professor in Cardiovascular Biology and Medicine. “We are immensely thankful that Linda Strough set up this bequest to assist us in carrying out our mission.”

The family’s lawyer and longtime friend, Bruce Bercovich, says Don and Linda made a number of philanthropic contributions to benefit medicine over the years. Sometimes the gifts were cars donated for fundraising raffles: Don owned a number of car dealerships, a family business launched in the 1930s when his father opened Val Strough Chevrolet in Oakland.

“Don and Linda were loyal people who felt very connected to Cal and UCSF. But mostly, Linda said she wanted to give to UCSF because they were so good to Don when he was ill,” Bruce says. “I am so pleased to see Don honored by this gift. He was a terrific guy.” ■



(Chara Schreyer, *continued from cover*)

The family sought treatment at UCSF and has been connected with the university ever since. Schreyer has held several leadership positions at UCSF, including membership on the UCSF Foundation Board of Overseers. Through her Kadima Foundation, she also has funded the Justine Kathryn Schreyer Diabetes Clinical Center at UCSF and the Justine K. Schreyer Endowed Chair in Diabetes Research, currently held by Michael German, MD.

Schreyer says she always was determined to keep Justine as healthy as possible, and that meant constant vigilance. When her second daughter, Natalie, was born, Schreyer needed extra help and learned of Martha Leuenberger, a Swiss-German baby nurse who had a stellar reputation in the Bay Area. “I hired her to move in with us for a few weeks, and she stayed with our family the rest of her life,” Schreyer says.

When Leuenberger passed away in 2013, she left her estate to Schreyer, who used the funds to buy the Kippenberger work in a nod to their shared German lineage.

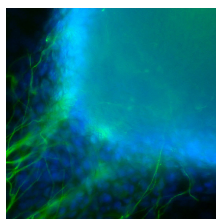
The endowed scholarship that carries both their names will support exemplary advanced practice nursing students, with a preference for those with established financial need who intend to care for infants and children, just as Leuenberger lovingly did for Schreyer’s family.

“This gift will ensure that our advanced practice nurses have the means and the opportunity to excel in their work with the youngest patients,” says Dean David Vlahov, BSN, PhD, RN. “It’s a splendid tribute to Ms. Leuenberger and furthers Ms. Schreyer’s unwavering, decades-long commitment to UCSF.”

With her daughters now grown and thriving, Schreyer says she hopes future scholarship recipients will have careers as fulfilling to them as Leuenberger’s was to her. “If you love babies and children,” she says, “there’s nothing more wonderful than caring for them.” ■

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UCSF Psychiatry Chair Matthew State, MD, PhD, says Dr. Porter's bequest will provide valuable support for future trainees.

(Robert T. Porter, *continued from page 3*)

Last December, UC Berkeley (where Porter received his undergraduate degree) and UCSF both received bequests from his estate. At UCSF, his bequest will be used to establish The Robert T. Porter Distinguished Professorship in Child and Adolescent Psychiatry, helping ensure that his legacy of thoughtful medical student training and patient care will live on in perpetuity.

Because he had long ago arranged for this bequest to UCSF, Porter was a founding member of Heritage Circle, the group that honors individuals who have included UCSF in their estate plans.

"UCSF attracts the best and brightest students, and many of them rely on our generous donors to help support their training in child and adolescent psychiatry," says Matthew State, MD, PhD, professor and chair of the UCSF Department of Psychiatry. "This gift is a terrific way for us to carry on Dr. Porter's dedication to students, residents, and young psychiatric patients. We're extremely grateful for his visionary bequest." ■