

SPRING / SUMMER 2017

Foresight

A Guide To Financial &
Charitable Gift Planning

UCSF



Baxter and Lorie Rice: Gratitude for Life-Saving Care

Baxter and Lorie Rice (center) established a charitable gift annuity to support the prostate cancer research of Eric Small, MD (left), and Terry Friedlander, MD (right).

Baxter and Lorie Rice, MPH, moved from Sacramento to San Francisco in February 1990, when she would start her new dream job as UCSF School of Pharmacy associate dean for external affairs. One short year later, her husband also came to UCSF, but he landed in the medical center with a diagnosis of prostate cancer.

"I put myself in the hands of two very competent people," Baxter says. As a patient of Eric Small, MD, and Terry Friedlander, MD, of UCSF's Genitourinary Medical Oncology Program, he received treatment he describes as exceptional, personal and caring. The two physicians also focused on his wife's well-being throughout his treatment.

(continued on page 6)

Foresight

A Guide To Financial & Charitable Gift Planning

- 1 Baxter and Lorie Rice:
Gratitude for Life-Saving Care
- 2 Building a Healthy Future
- 3 Don Truex, DDS '65:
Pride in Giving Back
- 4 Receive Income for Life
and Support Groundbreaking
Work at UCSF
- 5 Recent Estate Gifts

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.

Office of Gift & Endowment Planning

UCSF Box 0248
San Francisco, CA 94143-0248

giftplanning.ucsf.edu

TEL 415-476-1475

FAX 415-476-0601

EMAIL giftplanning@ucsf.edu

Daniel E. Riley, JD, *Executive Director*
M. Ellen Robb, JD, LLM, *Senior Director*
Judith A. Mazia, JD, *Director*
April Kim, *Associate Director*

Editors: Daniel E. Riley, Patricia Meagher
Writer: Patricia Meagher
Photos: Steve Babuljak
Design: Day Projects

© Regents of the University of California 2017

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



SITE OF THE NEW PRECISION CANCER MEDICINE BUILDING

Precision Cancer Medicine Building: *The new facility, to be located on 16th St. between 3rd and 4th and adjacent to the Ron Conway Family Gateway Medical Building, will consolidate UCSF's current cancer treatment facilities at Mount Zion and Mission Bay into a single location.*

Building a Healthy Future

It has been said that UCSF stands for “under construction, seldom finished.” Building new facilities is crucial to the university’s ability to stay at the forefront of the ever-evolving fields of medical research and discovery, patient care, and education for health professionals. Among several ambitious capital projects under way are the Precision Cancer Medicine Building at Mission Bay and a new UCSF research and academic building at Zuckerberg San Francisco General Hospital and Trauma Center (ZSFG). In both cases, philanthropy has played a pivotal role.

PRECISION CANCER MEDICINE BUILDING

The future Precision Cancer Medicine Building will revolutionize the way UCSF treats individuals with cancer. It will be a state-of-the-art center in which all cancer patients can feel confident that they are receiving the finest care in the world, care that is tailored to each individual’s biology and life circumstances.

The 170,000-square-foot, six-floor facility will create a new model for cancer centers around the world. With 120 consultation rooms, 19 imaging centers, 62 infusion bays, and multiple radiation oncology services, it will enable UCSF cancer patients to receive all their care in one place. Construction will begin this spring, and the building is scheduled to open to patients in early 2019. *(continued on back cover)*

Dentist, engineer, athlete and gentleman farmer Don Truex, DDS '65, established a charitable gift annuity to support students at the UCSF School of Dentistry.



Don Truex, DDS '65: Pride in Giving Back

As a competitive runner, cyclist, downhill skier, scuba diver, gentleman farmer and philanthropist, Don Truex, DDS '65, is probably busier in retirement than he was in his working years. He's always short of time, he says, but applies the principles of running to manage his jam-packed calendar.

"In running, you have to set goals for yourself," Truex explains. "You can carry that over into your life."

It's the same time management technique he used when, working as an engineer for Standard Oil, he attended night classes to meet the prerequisites for his acceptance to UCSF School of Dentistry. While completing two semesters of zoology simultaneously – engineer by day, student by night – he put in many 15-hour days; but the effort paid off.

"My education gave me the background for a rewarding life," Truex says. He operated his solo dental practice in Goleta, California, close to Santa Barbara, for 42 years. He developed warm and lasting relationships with the patients he cared for, many of whom were fellow engineers from the nearby Raytheon and GM Delco plants, while others were from multiple generations of families in the area. He also enjoyed keeping up with the latest dental technologies.

"I found it very satisfying to work with crowns and implants that could improve a patient's appearance and help them become functional again," Truex says. He retired eight years ago, at the age of 72, leaving more time for athletics *(continued on page 7)*

"In running, you have to set goals for yourself. You can carry that over into your life."

Don Truex, DDS '65

Receive Income for Life

and Support Groundbreaking Work at UCSF

With a charitable gift annuity, you can support the work of UCSF and receive fixed annual income for life. The most common way to fund a gift annuity is with cash or marketable securities. Generally the income from a gift annuity is payable to you, as the donor. However, a family member or friend can also benefit. The rate of income paid is based on the age(s) of the beneficiary(ies). Rates often compare favorably to rates offered on certificates of deposit and commercial annuities. Additional benefits include partial tax-free income and a charitable income tax deduction based on the amount UCSF is projected to eventually receive.



Like most charitable institutions, UCSF follows the rates recommended by the American Council on Gift Annuities. While most donors choose to receive their payments immediately, some opt to defer them until a later date, such as retirement. In that case, the annuity rate would be higher.

EXAMPLE: SINGLE-LIFE CHARITABLE GIFT ANNUITY - \$25,000

	PAYMENTS DEFERRED TO AGE 65		PAYMENTS BEGIN IMMEDIATELY					
Annuitant Age at Gift	55	60	65	70	75	80	85	90
Annuity Rate	6.5%	5.5%	4.7%	5.1%	5.8%	6.8%	7.8%	9.0%
Charitable Deduction*	\$9,601	\$9,574	\$9,033	\$10,486	\$11,626	\$12,688	\$14,245	\$15,800
Annual Payment	\$1,625	\$1,375	\$1,175	\$1,275	\$1,450	\$1,700	\$1,950	\$2,250

*Deductions will vary depending on the applicable IRS discount rate, which changes from month to month. Assumed discount rate used is 2.6%.

A charitable gift annuity can be unrestricted or designated for a particular area within UCSF such as the Medical Center, UCSF Benioff Children’s Hospitals, Schools of Medicine, Pharmacy, Nursing, Dentistry and/or the Graduate Division. You can also choose a specific purpose within these areas, such as student scholarships, research, faculty support, or patient care programs.

To learn more about charitable gift annuities or other types of planned gifts to UCSF, please contact us at 415-476-1475 or giftplanning@ucsf.edu. You may also visit us online at giftplanning.ucsf.edu.



Recent Estate Gifts

Oakland resident **Nancy Bradford** left a portion of her charitable trust amounting to \$410,121 to UCSF for general use.

Florence M. Burke, a resident of San Francisco, left a percentage of her estate totaling \$145,000 to benefit Alzheimer's research at UCSF in memory of her mother, Mayme Meehan.

Barney and Nina Cohen of Walnut Creek designated a portion of their estate totaling \$450,000 and the remainder of a charitable gift annuity amounting to \$79,550 to benefit the Department of Otolaryngology.

The UCSF Benioff Children's Hospital Oakland received \$4,851 from the estate of **Celeophas Eloby**.

Jean S. Engleman and Dr. Ephraim P. Engleman, a UCSF emeritus faculty member and director of the Rosalind Russell/Ephraim P. Engleman Rheumatology Research Center, left nearly a quarter of their estate, plus the residue of a charitable remainder unitrust, to benefit the Jean S. and Ephraim P. Engleman Endowment for support of research in Rheumatology, a tribute to Antonio Stradivari and Guiseppe Guarneri del Jesu.

Tanya Graham, a resident of San Rafael, left a specific bequest of \$180,000 to support the work of the UCSF Helen Diller Family Comprehensive Cancer Center.

The School of Nursing is expecting to receive approximately \$1,000,000 from the estate of emeritus faculty member **Jeanne C. Hallburg, PhD**, to establish an endowed scholarship fund in memory of her parents, LeRoy and Eva Hallburg.

Long-time supporter of the UCSF AIDS Research Institute Breakthrough Fund, **Ann Chase Hendrie** of Little Compton, Rhode Island, and Mystic, Connecticut, left a bequest totaling \$91,250 to establish the Anthony Chase Memorial Fund in memory of her brother, a San Francisco resident who predeceased her.

Eugene Howerton named UCSF as a beneficiary of his credit union account amounting to \$23,595 for the benefit of kidney research.

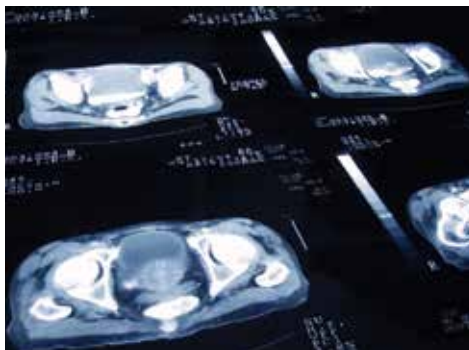
San Francisco resident **Ralph Mistler** left a specific bequest of \$7,000 from his estate for the benefit of the Men's Grief Counseling Group.

Healdsburg native **Edith B. Snider** left the residue of her estate, totaling \$587,668, to UCSF for urology and cancer research.



“I wanted to support the work in the urologic oncology group because the university has been so generous to me with its time and its care.”

Baxter Rice
UCSF patient and donor



(Baxter and Lorie Rice, *continued from cover*)

“For me, as Baxter’s caregiver, Eric and Terry have been amazing,” she says. “They still regularly monitor Baxter and are always one step ahead of the game.” Last fall, in gratitude for that care, the Rices established a charitable gift annuity to support prostate cancer research. It will fuel cutting-edge research on prostate cancer and the development of immunotherapies and other novel approaches.

“Working with Baxter and Lorie is a pleasure,” Small says. “Terry and I are so grateful for their support of our work on prostate cancer, and we are confident that it will lead to new knowledge and new treatment modalities.”

Serving for eight years as an executive officer of the California State Board of Pharmacy, Lorie was familiar with the nation’s pharmacy schools and a big fan of UCSF before she joined the faculty or her husband sought care there. She retired two years ago after 24 years with UCSF but stays involved doing School of Pharmacy admissions interviews and serving as a standardized patient, actors who portray patients in exercises designed to enhance students’ interpersonal skills.

“Pharmacy has always attracted intelligent and detail-oriented types,” Lorie says, “but since UCSF has the most desirable pharmacy program in the U.S., and the GPAs of prospective students are uniformly so high, the admissions process now looks for additional qualities like empathy, problem solving, community service and social consciousness.”

The Rices are socially conscious themselves, serving on boards of community organizations like San Francisco’s Homeless Prenatal Project and the Oakland Military Institute. Baxter – who started his career as a Jesuit and later worked as a banker, CIA intelligence officer, legal consultant, and director of the state Department of Alcoholic Beverage Control – devotes much of his time and philanthropy to PICO, People Improving Communities through Organizing, which has grown into a national network from its 1972 Jesuit and California origins.

“From the beginning I was confident in my UCSF physicians,” Baxter says. “I wanted to support their work in the urologic oncology group because the university has been so generous to me with its time and its care.” ■

(Don Truex, *continued from page 3*)

and agriculture. When he originally purchased his home in Santa Barbara, he planted a grove of 95 avocado trees. Now, in a good year and with proper tending, it will yield as much as 7,000 pounds of fruit.

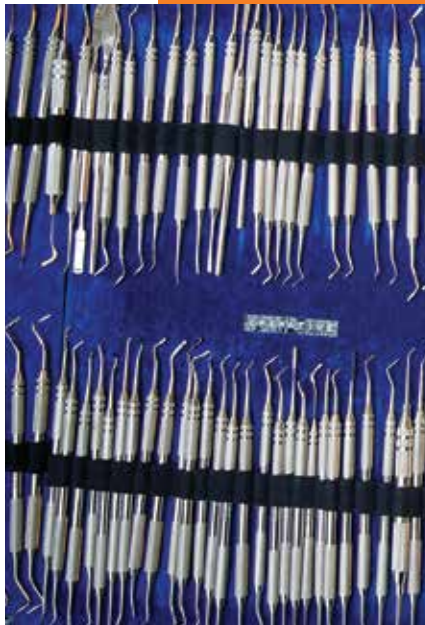
A longtime UCSF supporter, Truex has given back to the university in many ways. Remembering the scholarship that helped him complete his chemical and metallurgical engineering degrees at the University of Michigan, he recently established a charitable gift annuity using appreciated securities to support the Class of 1965 Endowed Scholarship in Dentistry. The scholarship will support a third- or fourth-year dental student in good standing with financial need or a first- or second-year student under special circumstances.

“We are truly grateful for Don’s generosity,” says UCSF School of Dentistry Dean John D.B. Featherstone, PhD. “Each year, this gift will support a bright, deserving and aspiring young student who might not otherwise be able to pursue a career in dentistry.”

Looking back, Truex says he chose UCSF because it was more affordable than the other three schools where he was accepted; but it also turned out to be the best. He fondly recalls such things as receiving his scuba diving certificate in a course taught by a UCSF anesthesiologist in the Millberry Union swimming pool and attending the 2015 Alumni Weekend, where he celebrated two milestones: his 50th UCSF class reunion and his 80th birthday. “I’ve always believed strongly in education,” Truex says, “and I’m proud to help the next generation.” ■

“I’ve always believed strongly in education and I’m proud to help the next generation.”

Don Truex, DDS '65



UCSF School of Dentistry Dean John D.B. Featherstone, PhD, congratulates Don Truex, DDS '65, at Alumni Weekend 2015.



ADDRESS SERVICE REQUESTED



Zuckerberg San Francisco General Hospital and Trauma Center:

The new research and academic building will provide state-of-the-art research space for more than 800 UCSF physician-scientists, trainees and staff at the ZSFG campus.



(Building a Healthy Future, continued from page 2)

ZUCKERBERG SAN FRANCISCO GENERAL HOSPITAL AND TRAUMA CENTER

The new \$188 million research and academic building at Zuckerberg San Francisco General Hospital and Trauma Center (ZSFG) will provide state-of-the-art research space for more than 800 UCSF physician-scientists, trainees and staff who work at ZSFG and are currently dispersed among several outdated buildings on the campus. The new building will be paid for by UCSF at no cost to city taxpayers.

The on-site presence of its robust research program is essential to maintaining top-quality patient care at ZSFG and to retaining and recruiting the world-class physicians who choose to work at ZSFG because of its public mission. One of the nation's premier community hospitals, ZSFG is San Francisco's only Level 1 Trauma Center, a rank reserved by the American College of Surgeons for only the most comprehensive trauma treatment centers. ZSFG trauma specialists each year treat more than 4,000 patients with critical injuries. ■