He is pleased to report that he can now enjoy his retirement knowing that his gift has been well received by the University. The University, through the efforts of the Office of Planned Giving, has been able to take the gift and create a charitable remainder trust. This trust will provide income to the University for the remainder of the Alums’ lifetimes, and at their death, the remainder of the assets will go to a designated charity. The Alums have been able to receive income tax charitable deductions for a portion of their gift, and they are now able to enjoy their retirement with the knowledge that their gift will be appreciated by the University.

Questions?

Contact the Office of Planned Giving

The planned giving vehicles described above, as well as others not mentioned, offer a variety of tax and income benefits to those who care about supporting UC Berkeley. The vehicles at your disposal can be used individually or in combination to meet your needs. We encourage you to consult with a trusted professional advisor, such as a tax attorney, accountant, or insurance professional, to determine which vehicles are best suited to your situation.

Pooled Income Fund

A pooled income fund is a trust fund that holds the assets of many individuals and is managed by the University. Typically, the charity — UC Berkeley, for example — manages the fund. Like charitable remainder trusts, pooled income funds are designed to pay increasing amounts in later years as the assets grow in value. Unlike most charitable remainder trusts, however, the payments from a pooled income fund are not limited by the actual amount received by the trust, rather than being a fixed percentage of the pool. Because the gifts of many donors are pooled into one fund, the minimum contribution at UC Berkeley is currently $300,000. This gift, which can be bequest or stock, entitles you to an income charitable deduction. As this is true for all planned gifts, you can designate the level or program that will receive your portion of the pooled fund at the time of your death.

 toll-free at 800.200.0575, by fax at 510.643.4066, or by e-mail at unex@berkeley.edu.
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Frank Hamilton at his Belvedere, California home, 1998; Photographs, clockwise from top of opposite page:
untitled sculpture (1960).
works — ceramic vase (1950), untitled painting (1960s), works — ceramic vase (1950), untitled painting (1960s)

Frank Hamilton, theimpulsive, the resilient, the doer, the one who "did the best he could," is a man who has always lived by example. His life is a testament to the power of art and the importance of education. It is also a story of the power of philanthropy, the giving of time and treasure to benefit others.

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Cal Futures

Art and Social Conscience

Frank Hamilton

Frank Hamilton spent his childhood in a world of social divisions — and divisiveness. But the view he developed was a very different one, distilled from the examples of quiet, everyday heroism he observed in his family and community. Most influential was his altruistic grandmother, who prepared food baskets and delivered them to townspeople struggling to survive during the Depression. He also admired the local physician who, bristling at any disrespect shown to his patients, earned his respect for his commitment to providing quality care.

But his strong belief in equal opportunity and social responsibility has always guided his life — including his efforts to support the arts. As he reflects on his career, he notes that his gift to Cal will accomplish both of these goals.

After growing up in a world of social divisions, Frank Hamilton went on to serve his country in World War II. While in favor of the Allied effort, Frank came away sobered by the personal and social costs of war. He learned that the G.I. Bill “is for bright people who want to go back to being farmers” and that “they didn’t have to. They could become doctors, lawyers, or something else.”

After the war, Frank earned a B.A. in political science from Stanford University. He planned to join the State Department, where he thought he might “make a difference.” As it turned out, he didn’t take that route. Instead, he worked briefly as an art forger for the San Francisco Chronicle and then settled into a career as a commercial real estate developer. In the meantime, he also devoted much of his energy to afield of art that had been deep interest of his since childhood — art.

Frank’s high regard for Berkeley— particularly for its role it continues to play in art education and furthering the cause of contemporary California art — was the primary reason he decided to support the University. Frank Hamilton learned much from the studios and seeing what was being produced. “I was unbelievably getting into the studios and seeing what was being produced.”

At the same time, he collected works with the intention of giving them to the San Francisco Museum of Modern Art. His larger goal was to nurture the careers of today’s and tomorrow’s artists and share the value of the work of California artists.

He also values Cal’s commitment to providing an affordable education. “Most of my contemporaries” he explains, “particularly those who received a college education thanks to the GI Bill, gave to public universities. They know firsthand the important role public support for education. They also know that at public institutions they can educate more people for less.”

In all of his reasons for giving to Cal, Frank is honoring the tradition of philanthropy he has observed throughout his life, beginning with his grandmother and her food baskets. “There is a value in your life,” his grandmother would say, “that you have to do for others.” Yet, he’s quick to add, “I think of philanthropy as a privilege, not a duty.”

After consulting with Counsel Hal Abrams, Frank decided he would support Cal’s Department of Art Practice by contributing assets to a series of charitable gift annuities. After his lifetime, the high payment rates from his annuities (all pay more than 8% of his contribution) enable Frank to meet his financial needs as well as continue to support the community through philanthropy. Because he has established his charitable gift annuity with cash, he therefore also values the benefits society. And he remains committed to ensuring that UC Berkeley will continue to nurture the careers of today’s and tomorrow’s artists and share the work of California artists with the world. He is confident that his gift to Cal will accomplish both of these goals.
A Season to Think about Planned Gifts

For Gifts of IRAs to Charities like Cal

The University of California Berkeley Foundation requires a minimum annual payment to cover administrative expenses of 5% of the account balance. Any remaining balance will be used to fund scholarships and other programs at the University.

For more information, please visit the Office of Planned Giving at ucop.edu/plannedgiving or contact the Office of Planned Giving at 510.643.4848.