Cal's alumni and friends enable the University to fulfill its mission of excellence in research, teaching, and public service and its commitment to educating students from all backgrounds and talents.

In these times of diminished state funding, Berkeley's supporters — whether they attended Cal or not — recognize the value of this institution to California and far beyond. They give to core academic needs, including scholarships for undergraduates who might be the first in their families to attend college, fellowships for promising graduate students, and endowed chairs for remarkable faculty members who cultivate the next generation of scholars.

Our donors also fuel the many programs that enliven this leading public university: a world-class library system; the art and culture of Cal Performances, the Berkeley Art Museum/Pacific Film Archive, and the Phoebe Hearst Museum of Anthropology; nature and abundance at the Botanical Garden; Berkeley spirit through intercollegiate and intramural athletics; groundbreaking research from the biosciences to the social sciences — and so much more.

In this issue of Cal Futures, we share two stories of donors who give to what moves them most and, in so doing, support Cal's incredible bounty of people and programs.
With a clutch of emotion in her voice, Elaine Ove ’56 explains how she and her husband, Wayne ’57, designated their generous planned gifts to Cal — to the Botanical Garden, location of their first date, where Wayne first showed off his vast knowledge of flora; to the library where both spent long hours studying and where Wayne memorized stanzas of Byron, Keats, and Shelley for fun; to the International House, where Elaine lived her senior year, enjoying the diversity and scholarship of its residents.

UC Berkeley, says Elaine, is a cherished institution that brought a farm girl from San Ramon together with a brainy Oregonian in a Cal Spanish class in 1956 and employed Wayne for more than three decades.

“Cal has played an important role in our lives,” says Elaine, explaining why she and her husband donated a Bay Area property in 2004 to support these beloved Berkeley programs. “Our children were in favor of it knowing how important the University is to us.”

Coming to Cal

Elaine grew up on a sheep ranch in the rolling hills of the San Ramon Valley, when the population was in the hundreds, not tens of thousands. The daughter of French-Basque immigrants, Elaine was educated in a two-room schoolhouse, except for the year when her parents sent her to live with an aunt and uncle in San Francisco on weekdays to attend a French school.

“The nuns were patient with me — I would get up and wander around like we would in the country schools,” recalls Elaine, noting that she wound up on the honor roll and learned to love education.

When it came time for college, she and her friends were decisive. “We farm girls were quite serious students. We weren’t bobby soxers,” laughs Elaine. “There was no question about where to go. It was Berkeley.”

Unlike Elaine, who had financial help from home, Wayne had to earn living expenses by working for a Berkeley landlord. “While the rest of us were in the stadium enjoying football, Wayne was painting houses,” says Elaine.

Both Latin American Studies majors — she interested in politics and he in economics — they met in an advanced Spanish class. Elaine, who considered herself a fluent speaker and an excellent student, was curious who had scored highest on one of the exams and flipped through the results. Lo and behold, she says, it was Wayne.

Later, when Wayne asked her to study with him, she refused. A fierce competitor, she was not about to share her limited time in “the RBR” (Reserve Book Room).

Ultimately, the Oves’ common interests brought them together and they married shortly after graduating. Possessing a keen eye for efficiency, Wayne was hired as a buyer in UC Berkeley’s purchasing department, was later promoted to head of purchasing for UC Santa Cruz, and then put in charge of purchasing for the entire UC system. He retired as UC’s emeritus director of material management.

Fruits of the land

Before their first child, the Oves purchased a parcel of 20 acres in Soquel, California — an orchard that boasted Pippin and Winter Banana apples. “My father feared Wayne would kill himself on the back of the tractor, cultivating the hillside,” recalls Elaine, who drove a tractor as a girl. “By the time we left, Wayne not only could drive the tractor, he could repair it.”

The Oves built a new home on the land, enjoying 17 harvests while raising three daughters and a bevy of farm animals. When UC’s Office of the President invited Wayne back to work in Oakland after years of service at Santa Cruz, officials offered to help with the move. “Do they know we have two horses, six chickens, and a couple of tractors?” asked Elaine.

A meaningful gift

Today, Elaine lives in Walnut Creek. She spends time adoring her 11-year-old grandson and visiting the Oakland Museum, where she was a docent.

Elaine spent much of these past months caring for her husband who experienced a rare and devastating disease called Shy-Dregar’s Syndrome. Sometimes she would sit at Wayne’s bedside reading the poetry he loved.

Sadly, after a lengthy illness, Wayne recently passed away.

Elaine says her husband was proud of the legacy the family is leaving to Cal — especially at a time of financial stress for the University.

She emphasizes that gifts do not have to be sheer altruism because donors can include the University in a charitable remainder trust and continue to receive income from the sale of a donated property.

“There are so many graduates — it’s a pool of people who need to be made aware of the opportunities to give,” says Elaine. “Cal is a leader and because of finances, it runs the risk of losing good personnel. The stature that Cal has built over the years should never be sacrificed because of money.”
Tending his gardens

Warwick May's journey to the United States began on a low-budget charter flight from London to New York in the mid-1980s. After boarding, the flight attendant announced: "Welcome to your flight to Delhi," prompting Warwick and his fellow passengers to jump up and shout until the error was corrected.

Warwick and a friend arrived in New York with little more than enough money to buy a used Pontiac Grand Safari that would take them on a momentous road trip across the country. The pair used the address book of Warwick's mom to chart their course, announcing visits from a pay phone before landing on their host's doorstep. Warwick says they encountered everyone from hippies to Vegas politicians and found an astonishing amount of American generosity along the way.

When Warwick stopped in the Bay Area, he knew he had found a new home. He posted a job announcement in the San Francisco Chronicle: "Young Englishman will do anything legal for money." From 16 offers, he selected a job working for a couple who needed him to care for their stables and grounds in the Oakland hills.

“They became like parents to me,” says Warwick, who is now a successful real estate agent in Berkeley. “They didn’t have a garden. I said, ‘wealthy people all have gardens — you need a garden.’”

Warwick, who had learned something about gardening from his British grandfather, cultivated a lush English garden for the couple — installing waterfalls and ponds on the expansive property.

He later adored his own south Berkeley garden that contained hundreds of plants and a pond with koi that were three feet long. (He noted that his fish were bigger than his cat, which was bigger than his dog.) The garden — with 25 maples, dogwoods, and other flowering trees and plants — suffered an almost devastating blow a few years ago when a wayward caretaker failed to water it for weeks while Warwick was away.

Although Warwick had lived in Berkeley for decades, he did not know about the UC Botanical Garden at Berkeley until a friend of a friend told him he must become a member.

“The more I saw the Botanical Garden, the more incredible I felt it was,” says Warwick, choking up. “I thought I should be a part of it.”

The Botanical Garden cultivates 13,000 plants, including many that are rare or endangered. Some of the garden’s most famous residents include the Titan arum, which lets off a rare and horrible stink when it blooms once a year, and the brilliant 15-foot, lime green Puya chilensis, native to Chile. Established in 1890, the garden, which is open to the public year-round, is cultivated over 34 acres in the Berkeley hills.

Warwick is now a Botanical Garden board member and among its biggest proponents. With a planned gift, he is joining other generous friends of the garden to ensure that the treasure of biodiversity will continue to thrive.

Although not an alumnus himself, he has a deep appreciation for the garden as well as the campus as a whole. “I have lived in Berkeley a long time,” Warwick says. “It’s a remarkable place and largely because of the University.”

Answer to “Famous Alum”

From the spirited and pesky Ramona Quimby to the plucky mouse on a motorcycle, author Beverly Cleary ’38 (née Bunn) created scores of characters that spoke to children. Cleary, who is from the Pacific Northwest, transferred to Cal after two years at a junior college and majored in English. “I spent the first day or two of that first semester hurrying up and down hills, campus map in hand, inhaling the smell of tomato catsup, which someone had explained came from a cannery ‘down in the flats,’” she recalls in a reflection about Cal.

After UC Berkeley, Cleary earned a library science degree at the University of Washington. She married Clarence Cleary in 1940 and after the birth of her twins, Marrienne Elizabeth and Malcolm James, she started writing children’s classics such as Henry and Beezus, Ramona the Pest, and Runaway Ralph. Critics say Cleary’s unique ability to use humor to tap into universal themes makes her books — written over the past 50 years — timeless and endearing. Now living in Carmel, California, Cleary is still publishing new work.
New tax law: big changes and opportunities

An important new tax law — The Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010 — signed by the president last December, positively affected estate planning and charitable giving.

First, the law extends the IRA charitable rollover provision that allows donors to make charitable gifts directly from their IRA accounts to UC Berkeley without incurring federal or California state income tax on the withdrawal. Unless renewed, this extension lasts only until December 31, 2011.

The law stipulates that you must be age 70 and a half or older at the time of the gift; charitable distributions can total up to $100,000 per person per year; and distributions can satisfy your Required Minimum Distribution (RMD). Rollovers are not subject to the 50-percent deductibility ceiling and, they can be used to satisfy a pledge. (The campus cannot provide any benefits as a result of these contributions, however.)

Second, the law increases to $5 million the amount of money — estate- and gift-tax free — that individuals may transfer to non-charitable beneficiaries. Married couples can transfer a total of $10 million. The new top tax rate for transfers above this amount is 35 percent. This increased exemption and lower top tax rate are in effect until the end of 2012, unless extended by further legislation.

If you have already fully used the former $1 million gift-tax exemption, you currently can give up to $4 million more. If you are contemplating gifts — including life income gifts — for a non-federally recognized spouse or partner, household employee, or friend, now may be the time to “lock in” the increased exemption amount should the law change again. Additionally, because of all-time-low interest rates, it might be a good time to consider creating charitable lead trusts that give income to UC Berkeley now and return the remaining principal of the trust to your family after a period of years.

Third, the Tax Relief Act suspended for two additional years (until the end of 2012) the 3-percent reduction of federal itemized deductions for higher-income earners. This allows higher-income earners to make larger outright gifts without having to reduce the amount of the deduction.

Finally, until December 31, 2011, a relatively unknown part of the law includes a provision allowing S-corporation shareholders to take into account their pro rata share of charitable deductions even if such deductions would exceed the shareholder’s adjusted basis in the S corporation.

The law is complex. We advise you to speak to your estate planning advisors if you have not done so since the law’s passage. We will be happy to work with you or them to include a charitable gift to UC Berkeley in your plan.

To learn more, contact the Office of Gift Planning at 510.642.6300 or ogp@berkeley.edu. Or you can find up-to-date information at your convenience at planyourlegacy.berkeley.edu.

Director’s Column

When I speak with alumni and friends about their Cal memories, I am always struck by the unique ways this great University has touched people’s lives.

In this issue we share the stories of how our Cal donors — Wayne ’57 and Elaine ’56 Ove and Warwick May — generously contribute to critical Berkeley programs. The Oves are providing valuable support to the library, International House, and so much more through their charitable remainder unitrust, while Warwick May directs his generosity to the Botanical Garden via a bequest.

UC Berkeley offers many ways for you to support the campus programs you love with a planned gift.

Your gift can be made as a bequest through your will or living trust, through a beneficiary designation in your IRA (or an outright IRA rollover gift if you are at least 70 and a half years old), or through designating Cal as a beneficiary of a life insurance policy. You may make an outright gift of a complex asset such as real estate, privately held securities, or partnership interests. Or you may make a life income gift such as a charitable gift annuity or a charitable remainder trust.

UC Berkeley’s expert staff can knowledgeably explain any of these possibilities and can work with you and your advisors to help you attain your philanthropic, financial, and estate planning goals.

To learn more about how you can support Cal’s core academic mission or its many diverse programs, please contact the Office of Gift Planning at 510.642.6300 or ogp@berkeley.edu. You may also learn more about these different gifts at planyourlegacy.berkeley.edu.

Fiat Lux!

Kevin T. Crilly, J.D.
Director, Office of Gift Planning

Cal Futures is now offered in digital format. If you would like to go paperless, please sign up at calfutures.berkeley.edu and receive your spring ’12 issue electronically. At this site, you can view, download, save, and share the latest or past issues of Cal Futures.
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☐ Cash/Securities/Mutual Funds
☐ Real Estate

Gifts that pay you income
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Gifts that take effect at your passing
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☐ I/We have already included Cal in my/our estate plan.
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Name(s)

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