

LIGHT THE WAY
THE CAMPAIGN FOR BERKELEY

CAL FUTURES

PHILANTHROPIC, FINANCIAL, AND ESTATE PLANNING NEWS
FOR UC BERKELEY ALUMNI AND FRIENDS

SPRING 2023

**GO BEARS,
GO GREEN!**

To receive *Cal Futures* electronically, sign up at calfutures.berkeley.edu.



How did the Morrison
Library get its name?

Answer inside.

Photo: Keegan Houser

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Office of Gift Planning
1995 University of California, Berkeley
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A Note from the Co-Executive Directors

Welcome to the Spring 2023 issue of *Cal Futures*! As we enter the final year of Light the Way: The Campaign for Berkeley, we reflect with gratitude on the support of our donor community.

Last November, Berkeley reached its ambitious \$6 billion campaign goal. The campaign launched publicly in February 2020. And just two weeks later, COVID-19 changed everything — except your steadfast support! The incredible success of the campaign is demonstrative of our community’s collective power to realize a common vision for our future. Thank you!

While we have surpassed our overall monetary goal, several vital campaign objectives have not yet been fully met: growing our faculty, increasing undergraduate and graduate support, and funding certain capital projects. We will pay special attention to those goals in the remaining months of the campaign, and we encourage you to visit light.berkeley.edu to learn more about how you can invest in these key priorities.

Planned giving donors are an invaluable part of the campaign’s success. In this issue of *Cal Futures*, we highlight a powerful way Berkeley supporters like you can help expand the campaign’s success, leave a legacy at Cal, and maintain financial security. By making a gift through your revocable (living) trust or will, you can support the programs you love on campus without reducing your assets or affecting your cash flow during your lifetime. Julia Klee, a law school alum, did just that when she included a bequest gift in her estate plan to support Berkeley Law and the Rausser College of Natural Resources.

To learn more about gifts through your living trust or will, please contact us at (510) 642-6300 or ogp@berkeley.edu. Fiat Lux!

Rachelle Regan and Rebecca De Kalb
Interim Co-Executive Directors
Office of Gift Planning

The Life Trajectory of Julia Klee

Alum’s estate plan supports law and the environment



Julia Klee '80 honors her love of nature with her support of Berkeley.

By Dana Enfinger

You couldn't have planned the life trajectory of Julia Klee '80 even if you tried.

“Opportunities just presented themselves,” Julia recalls. “I never thought about making a fortune. I thought about making a contribution. As a refugee I thought, ‘Why am I alive when so many people died?’ That question drove me.”

Julia was just a toddler when her family left Lithuania toward the end of World War II as Soviet troops were returning. Her family fled to the West. After the war in Europe ended, her family was assigned to a displaced

persons’ camp in the U.S. controlled sector of post-war Germany. They applied for entry to live in the United States when this became a possibility. In 1949, her family moved to the Chicago area. Julia graduated from the University of Illinois Urbana-Champaign with a degree in chemistry.

But the West Coast beckoned, and Julia found herself in San Francisco in 1969. She volunteered for the Peace Corps in Kenya in the early 1970s. When she came back to California, she worked in environmental compliance for the Bay Area Air Quality Management District.

Julia decided to study law when she noticed how lawyers seemed to be present in the inner workings of many environmental issues at the district.

“I thought I could make more of an impact on environmental issues if I studied law,” Julia says. “I could combine my background in science with law. It just fit.”

That brought her to Berkeley Law. After Berkeley, Julia worked for a law firm in the Bay Area and Washington, D.C., in its environmental business division. At that time — in the early 1980s — it was one of the few law firms in the country that had such a practice.

Julia also worked for the Office of Environment, Health & Safety at UC Berkeley where she made connections with faculty members at Rausser College of Natural Resources (RCNR) and the Energy & Resources Group. Those connections would eventually influence her philanthropy.

WILL/LIVING TRUST

How it works



Cash



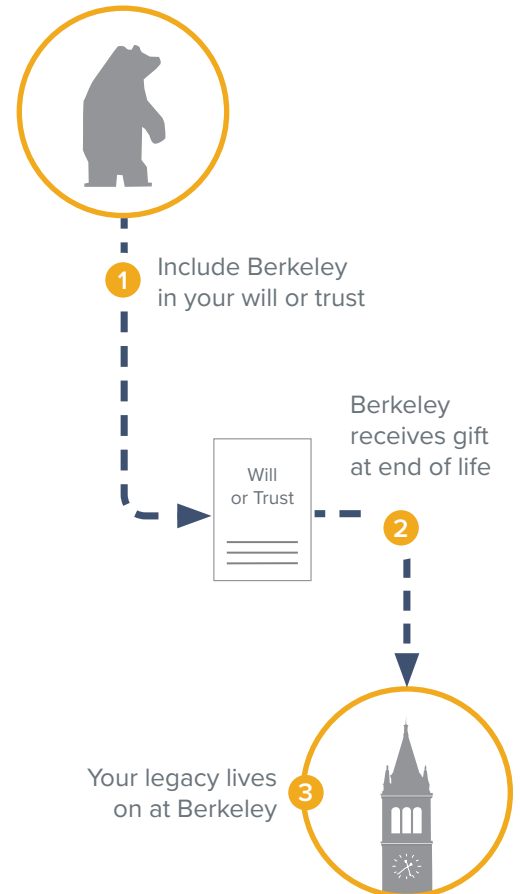
Stocks
and/or Bonds



Real Estate



Tangible
Property



Julia Klee '80 and husband Howard now live in Bend, Oregon.

Julia met husband Howard in D.C. before his job moved them to Beijing. After a short stint back in Chicago, the war refugee found herself working for the United Nations in Geneva, specifically for the United Nations Compensation Commission with a focus on environmental issues. The commission was created to deal with numerous claims following Iraq's invasion and occupation of Kuwait. Julia and Howard would live in Switzerland for 22 years. They returned to live permanently in the United States in February 2022.

"I had to come back to the West Coast that I love so much," Julia says from her home in Bend, Oregon. "We love the trees, hiking possibilities, and the clean air — except for the forest fires."

Julia's forward momentum continues: **She has made a bequest commitment to create the Julia Epley Klee Fund, a 10-year endowment** to support teaching and research in the areas of environmental law and international and comparative law. Julia has also committed to supporting the Center for Law, Energy & the Environment — known as CLEE, which coincidentally is pronounced just like Julia's last name — as well as the school's Human Rights Center. Additionally, she is including RCNR in her estate plans.

Julia says her contributions to the law school in part honor her dear friend Berkeley Law professor emeritus David Caron who passed away in 2018.

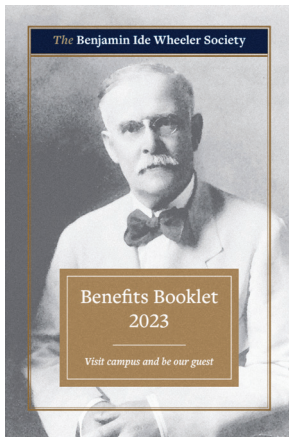
"I wish my resources were as great as the number of things I'd like to support," Julia says. "I think about the departments of architecture and music and the Library. **The university has so much strength across disciplines. But I'm showing support in areas that mean a lot to me since Berkeley has been such a tremendous influence on my life's path.**" ■



How did the Morrison Library get its name?

May Treat Morrison left a legacy in honor of her husband, Alexander, when she donated their 15,000-volume library in 1921. The couple went to Berkeley, and both graduated in 1878. The Morrison Library within Doe Memorial Library has been one of the most beloved spots on campus ever since. It serves as a haven for students and is open to the public. In addition, Mrs. Morrison left UC Berkeley funds that were used to construct Morrison Hall for the Department of Music. ■

The Benjamin Ide Wheeler Society



We hope that all 2,900-plus Wheeler members received their 2023 Wheeler Society Benefits Booklets in the mail. If you have not, please be in touch with our office. The booklet is a treasure trove of passes and discounts to campus museums, exhibits, and activities.

Meanwhile, Chancellor Christ and the Office of Gift Planning are looking forward to seeing Wheeler members on campus in July! We have set a new date for the 2023 Annual Wheeler Lecture and Luncheon: Friday, July 21, 11 a.m. to 1:30 p.m. Please be on the lookout for the formal invitation that will be sent out in June. ■

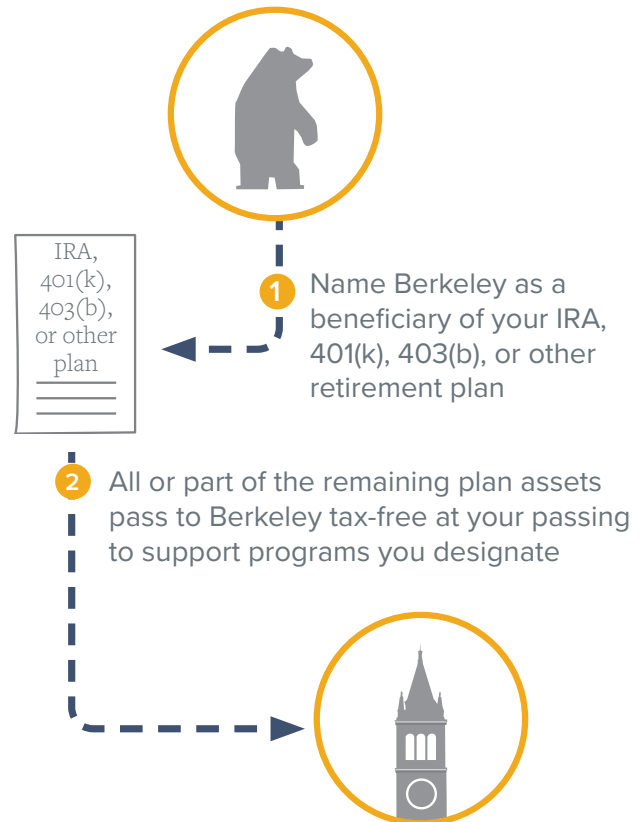
A Tax-Smart Way to Support Berkeley

Consider an IRA beneficiary designation gift. When you name the University of California, Berkeley Foundation as a beneficiary of your IRA:

- You, your heirs, and your estate will not pay income tax on the distribution of the assets to Berkeley
- The value of your retirement fund assets directed to Berkeley will be available, undiminished by taxes, to support the program(s) you designate
- You can divide your IRA assets among Berkeley and heirs as you wish

You can also name the University of California, Berkeley Foundation as the beneficiary of your Donor Advised Fund or a brokerage account. Contact our office to learn more. ■

How Does a Beneficiary Designation Gift Work?



This newsletter offers only general gift planning information. We urge you to seek the advice of an attorney in developing your personal estate plan, as the Office of Gift Planning may not render tax or legal advice to friends and alumni of the university. If you would like more information concerning charitable giving as a component of estate planning, we would be happy to provide you with more specific ideas.

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Office of Gift Planning, University of California, Berkeley

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I have already included Berkeley in my estate plan.

I am not sure which gift plan would work best.

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How will you Light the Way?

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