A deeply personal investment

With all of the types to choose from, legal and tax strategies to navigate, and individual goals to contemplate, making a planned gift can feel overwhelming. Luckily, UC Berkeley offers a friendly, knowledgeable team to help you sort through the issues — and ensure you land on a gift that is practical, powerful, and personal.

**R. J. “Rocky” Gutiérrez Ph.D. ’77 and Holly Brownscombe** both made gifts that are deeply personal. Although Rocky was told he’d never succeed in college, he received a Ph.D. and is an expert on the spotted owl. He and his wife established a charitable gift annuity that will support traditionally underrepresented graduate students who share an affinity for the Museum of Vertebrate Zoology. While Holly didn’t attend Berkeley, she grew up here and still lives nearby. Her deferred charitable gift annuity will support the Campanile — for her a symbol of beauty, history, and her family’s love of bells.

Whatever your financial and giving goals are, you, like Rocky and Holly, can support the campus’s highest priorities or a program or place on campus that holds a huge place in your heart.
Having grown up nearby with several family members who either attended or worked at the university, Holly Brownscombe was destined to give to Berkeley. The conundrum was deciding where to designate her gift. It wasn’t until she toured the Jane K. Sather Tower, aka the Campanile, that her answer rang as clear as the bells.

“Sometimes I get choked up when I hear them,” she says. “Something went through my system that day, and I knew that was it.” Holly created a deferred charitable gift annuity that helps ensure the Campanile will continue to “stand fast, look high,” as UC President Benjamin Ide Wheeler said of the monument at its cornerstone-laying ceremony more than a century ago.

Never just a stone tower, the Campanile is a beautiful landmark, a treasure trove of history, a music box, and familiar friend. Most of all, it is a symbol of Berkeley’s enduring contributions to California and the world.

For Holly, who lives in Berkeley, the bells are also a lovely soundtrack that fills the air and marks time. “It has a nice feeling,” she says, “very centering, balancing, and calming.” But the bells didn’t always hold as much meaning.

Holly recalls frequent fieldtrips to campus as a child with her parents, Bob ’41 and Virginia, and brother, David. They would wander around, listen to concerts at Hertz Hall, attend basketball games, and visit her Aunt Wilma, who worked in the physics department. They often enjoyed lunch in the Faculty Club, which her mother and aunt treated as a special occasion. Holly says she has probably walked by the Campanile a thousand times, and hears it every day, “but now it’s resonating with me. I’m paying more attention to it.”

She learned on the tour she attended, which was hosted by the Office of Gift Planning, that 20 tons of ancient fossils — most of them excavated from tar pits in prehistoric Los Angeles by UC paleontologists in the early 1900s — occupy five floors of the Campanile.

“I also love the old, gnarly trees outside. They’re like characters in a sci-fi movie,” she says, noting the strange dichotomy between when they are trimmed versus when their leaves have filled in.

A family thing

Bob, Holly’s father, studied plant pathology at Berkeley, where he met her mother, Virginia. After graduating, Bob worked in the agriculture business selling fertilizer throughout California. Virginia was a fastidious accountant and worked briefly, among other places, in Berkeley’s School of Public Health. Both of them loved wine and attended wine tastings in Northern California and Europe in the 1970s before they were popular. Bob established two charitable gift annuities to benefit the College of Natural Resources, which inspired Holly to make her own gift.

Holly graduated from UC Riverside in 1970 with degrees in history and English. As a young woman, she worked in an inner city children’s center in LA. She then moved to Seattle, where she earned her teaching credential in special education. But her grandmother’s illness lured her back to California.

“When my grandmother was diagnosed with cancer, she wanted to be at home,” says Holly, who took care of her grandmother during the final months. “She was like my second mom. I’m glad I got to do that for her.”

Education eventually called to Holly again, but instead of being inside of the classroom, she started working outside of it — as a human resources director for the Contra Costa County Office of Education for over 15 years.

Since she retired 10 years ago, Holly has continued to offer her expertise as a consultant and as a volunteer for a virtual retirement village that offers companionship and support to elderly people who want to stay in their homes. She also still frequents the campus — as a longtime season ticket holder for men’s basketball.

In reflecting on why she chose to support the Campanile, Holly made a surprise realization. Her mother, aunt, and uncle, Leon Street ’41, played hand bells in their church choir, passing on to her a love of bells. “It’s a family thing,” she says with a chuckle … as is their deep love for Cal.
Soccer player Alex Morgan is an Olympic and National Women’s Soccer League champion, a U.S. Soccer Female Athlete of the Year, and a member of the U.S. Women’s National Team’s All-Time Best XI squad. She wears the No. 13 as a tribute to her hero Kristine Lilly. After winning gold at the 2012 London Games, she played in the 2016 Rio Games this past summer. As a Golden Bear, Alex finished her career as Cal’s single season-season leading scorer, a four-time all-Pac 10 performer, and a 2010 All-American. Off the field, Alex is one of sports’ most recognizable faces. Yet her best-selling books, written for young girls, are her most meaningful contribution. This empowering, fun-filled series about believing in yourself and working as a team may one day propel the next unknown to the top of the soccer world.

**Found at Berkeley – A welcoming scholarly home**

Growing up in Albuquerque, New Mexico, R. J. “Rocky” Gutiérrez Ph.D. ’77 endured stinging rebukes from nuns in his school that made him doubt his abilities. With his independent streak and outspoken mind, Rocky often ran afoul of strict teachers — and was told he’d never succeed in college. Not only did he eventually receive a Ph.D. from Berkeley, he found an instant academic home in the Museum of Vertebrate Zoology (MVZ) that shaped his career and inspired a recent gift.

Following high school, Rocky headed to the military, where his high IQ scores landed him a four-year stint in Army Intelligence units in the Middle East and Japan. Motivated to dispel those early uncertainties when he got home in 1967, he began pursuing bachelor’s and master’s degrees in wildlife biology and biology, respectively. One day, while finishing his master’s work at the University of New Mexico, Rocky dropped by a recruitment talk where a Cal student was encouraging minority students to consider graduate studies in zoology. While Rocky had not set his sights on either Berkeley or a Ph.D., the prospect of studying at the famed MVZ launched a decades-long relationship that will extend for years to come.

Rocky arrived at the MVZ in 1973. With a world-class collection of 700,000 animal species, the century-old museum is dedicated to research on evolution and conservation. Rocky loved its openness and the free flow of ideas and theoretical approaches that marked its culture. “The general atmosphere, intellectual dynamism, and collegiality all shaped me and allowed me to go in the direction I wanted,” says Rocky, who became a noted wildlife ecologist and professor. “I haven’t seen that type of interaction anywhere else I’ve been.”

For the first time in his academic career, Rocky felt he was treated fairly at the MVZ. Integrative biology professor Howard A. Bern, a caring mentor and staunch advocate for equity and inclusion in the sciences, regularly took Rocky out to lunch — a practice that Rocky carried on with his own graduate students. “When people give you a helping hand, it can make a huge difference in your life,” he says.

To demonstrate gratitude for his MVZ experience, Rocky and KT, his wife, have made a generous planned gift to Berkeley. Their charitable gift annuity, which pays them income for life, will eventually create a fellowship supporting future graduate students who are traditionally underrepresented minorities and preferably share Rocky’s engagement with the MVZ and ornithology-related fields.

**A soaring career takes flight**

Rocky credits the MVZ with another major positive in his life: a 36-year association with the spotted owl. Harnessing theories about evolutionary biology he got from the MVZ, Rocky began studying the shy, brown-eyed owl in 1980 as a new professor at Humboldt State University. Today he is considered a leading expert on the creature that became a national environmental symbol over the effects of logging in the Pacific Northwest. “It was, at the time, the biggest conservation controversy in North America,” he says.

Rocky and his students contributed to the designation in 1990 of the northern spotted owl as threatened

**Continued on next page**

**Answer to “famous alum”**

Alexandra “Alex” Morgan ’14

Soccer player Alex Morgan is an Olympic and National Women’s Soccer League champion, a U.S. Soccer Female Athlete of the Year, and a member of the U.S. Women’s National Team’s All-Time Best XI squad. She wears the No. 13 as a tribute to her hero Kristine Lilly. After winning gold at the 2012 London Games, she played in the 2016 Rio Games this past summer. As a Golden Bear, Alex finished her career as Cal’s single season-season leading scorer, a four-time all-Pac 10 performer, and a 2010 All-American. Off the field, Alex is one of sports’ most recognizable faces. Yet her best-selling books, written for young girls, are her most meaningful contribution. This empowering, fun-filled series about believing in yourself and working as a team may one day propel the next unknown to the top of the soccer world.
under the Endangered Species Act and helped preserve millions of acres of old-growth forest.

“[My students and I] didn’t have nearly the resources available that other people did in terms of grant money and support,” he says. “But we made a hell of an impact on ecology and science.”

Rocky observed spotted owls in dense forests throughout the West. His discoveries — including the finding that the owls’ survival depends on the structure of forests, rather than simply the age of the trees — influenced logging methods designed to help owl populations and the timber industry alike.

The recipient of many accolades, Rocky retired in January as the Gordon Gullion Endowed Chair in Forest Wildlife Research at the University of Minnesota. “I’ve still got lots of science left in me,” he quips.

He and KT, a former medical lab director, now live in the pint-sized town of Fieldbrook on California’s north coast. Rocky keeps busy with research and consulting projects from his home office. Sadly, the northern spotted owl’s future remains precarious — a rival owl that has invaded its territory is threatening its survival.

That development underscores the need to prepare young scientists for the next wave of conservation challenges. And that’s where Rocky and KT’s gift comes in. “It’s an opportunity for people to get their Ph.D. and do bigger and better things for science and, hopefully, conservation,” says Rocky. “There’s a lot of talent that’s yet unrealized among disadvantaged and underrepresented groups.”

**Invest in Berkeley with a charitable gift from your IRA**

IRA rollover gifts are a smart way to give. Not only do you avoid incurring income tax on the withdrawal, you are helping students realize their dream of a Berkeley education today. A gift of $5,000 could finance an annual scholarship for one undergraduate; $50,000 could subsidize the summer research projects of 10 students; and $100,000 could help 1,000 graduate students with writing, teaching, and career preparation. IRA gifts at every level make an impact! Visit planyourlegacy.berkeley.edu for helpful tips on making your gift, or contact us at 800.200.0575 or ogp@berkeley.edu.

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**A Note from the Executive Director**

UC Berkeley has been educating minds for more than 148 years — through 26 U.S. presidents, two world wars, and the invention of the automobile, moving pictures, space exploration, and now iPhones. The university was here when the SF Giants won three World Series and when the Oakland Raiders started, left, and returned. It was here when Silicon Valley was full of orchards and before any bridges connected the East Bay to its San Francisco and North Bay neighbors. It’s the birthplace of the Free Speech Movement, the Disability Rights Movement, and oh so much more, and its students have traveled the world with the Peace Corps in greater numbers than any other U.S. university.

Through all of this, Berkeley perseveres. Correct that — it flourishes. Every year it offers a premier education to thousands of academically qualified students — more than all of the Ivy League schools combined — who come from low-income families. It conducts world-renowned and life-changing research, from altering the genetic code to robotic legs to alternative fuels to the origins of the universe. In August, the Academic Ranking of World Universities placed Berkeley at the very top of public universities globally — and third overall, up one slot from 2015, following Harvard and Stanford.

Berkeley would not be where it is without visionaries who have invested in its future — even during turbulent times. Whether it was philanthropist Jane Sather, who created the first life income gift to Berkeley at the turn of the last century, or the two philanthropists featured in this edition of *Cal Futures*, Berkeley has relied upon tens of thousands of dedicated supporters who made an annual gift from their income, a major gift when called upon, or the ultimate investment through a life income or estate gift.

There are numerous ways you can join the long list of fiercely loyal supporters who have made Cal what it is today. Please do not hesitate to contact our office to explore your options. I promise it won’t be a hard sell. We’re here to help you make your philanthropic vision a reality.

**Fiat Lux!**

Kevin T. Crilly, J.D.

Executive Director, Office of Gift Planning

UC Berkeley

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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.
How to contact the
Office of Gift Planning

call 510.642.6300 or 800.200.0575 (toll free)
email ogp@berkeley.edu
web planyourlegacy.berkeley.edu
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Gifts that take effect at your passing
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☐ Real Estate

☐ I/we have already included Cal in my/our estate plan.

☐ I am/we are not sure which gift plan would work best. Please contact me/us.

___________________________________________ a.m./p.m.

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University of California, Berkeley
Office of Gift Planning
University Development and Alumni Relations
2080 Addison Street #4200
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