Which Berkeley president oversaw construction of the Campanile?

Answer inside.
A Note from the Executive Director

Welcome to the redesigned Cal Futures! This issue highlights a gift planning option that allows Cal donors to support the university while also enjoying financial benefits — charitable remainder trusts (CRTs).

Take donor Emily Risberg, profiled in this issue. Her CRT demonstrates this flexible gift’s benefits in action. The income generated from her trust will not only support Cal women’s field hockey well into the future, but it will also provide Emily with income now — along with valuable tax benefits.

CRTs like Emily’s have been helping Berkeley for years, even during uncertain times. Just before the 2008 financial market crash, Gilbert Rankin created a CRT to support faculty. After the crash, Nancy Kelso created a CRT to support the College of Natural Resources. While neither knew what the economy would be like when their gifts came to fruition, they knew Cal would still be flourishing and their gifts would be used as intended. You’ll see the remainder values of these gifts, along with many many others, in the graph highlighting the past decade’s matured life income gifts of $82 million (see back page). They are a tremendous source of support for the university — from scholarships and research to the evolving needs of the campus — and for that, we’re grateful.

If you’d like to know more about CRTs, please contact us at (800) 200-0575 or ogp@berkeley.edu. We would enjoy hearing from you.

Fiat Lux!

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

Lift While You Climb

Field hockey alumna honors former coach through scholarship gift

In 2015, Cal women’s field hockey adopted a motivational mantra to get through tough times: “Lift while you climb.” In other words, help others while you help yourself, and everybody wins. Former Berkeley field hockey star Emily Risberg ’81 reflects this same spirit of compassionate play in her lifestyle and actions, and she credits former Cal coach Donna Fong ’61 (1976–94) for helping to instill that ethos.

“She opened up my world in a way that I’m still benefitting from today,” says Emily, who is honoring Donna’s gift of guidance by establishing a field hockey scholarship in her name. “Donna’s belief in me was my seat of confidence. I admired her coaching style. She had this calmness about her, and her technical knowledge was off the charts. She brought out the best in her players.”

Emily, who now coaches field hockey herself at Saint Francis High School in Mountain View, first met Donna during a summer sports camp when she was a teenager. It was a challenging time in Emily’s life; she was dealing with the devastating loss of her 11-year-old brother, who died of leukemia when she was 14. Sports provided distraction and respite from the trauma of losing the person she called her best friend.

“He was my buddy. My first true love. We did everything together. I had to work out a lot of issues. Sports helped me find my Zen.”
Around that time, Title IX — a game-changing congressional amendment to the Education Act that prohibits sex discrimination in federally funded educational programs — had just passed, and collegiate women’s sports blossomed across the nation. Emily’s spirit did too the summer that Donna taught her how to play field hockey. At the confluence of these watershed moments, Emily’s future was borne aloft. She was inspired to apply for sports scholarships, and Cal was there with open arms.

“I had no idea when I first met Donna that she would one day be my coach, but once I got to Berkeley, she really helped me grow — in self-reliance, confidence, leadership. I was not ready for college . . . I was scared to let go. She believed in me.”

Senior year, Emily met teammate and longtime friend Shellie Onstead ’83 — who today wears the Cal field hockey coaching mantle — and the two helped make sports history under Donna’s even-keeled leadership.

“Donna took our team from ‘raw’ to second in the nation — in four years!” recalls Emily. “That’s amazing.”

Today, Emily continues her role as a valuable team player. With husband Jeff, their gifts to the university include the Donna Fong Scholarship and the funding of a charitable remainder trust. These gifts will not only earn her family income, they will also help support Coach Onstead’s limited operating budget.

“Emily’s gift reflects her passion for the program, and the perspective of appreciation that I think we all acquire over time,” says Coach Onstead, who’s in her twenty-second year of coaching. “She sets an amazing example for everyone.”

How Does a Charitable Remainder Trust Work?

1. Donor makes a gift of cash, securities, or real estate into a trust
2. Trust pays fixed % to donor or beneficiary
3. Remainder passes to Berkeley at trust termination

Answer to “Who oversaw construction of the Campanile?”

Benjamin Ide Wheeler (1899–1919)

During his 20-year tenure, Benjamin Ide Wheeler transformed Cal from a small college campus to a world-class university and left an architectural legacy. Partnering with some of Berkeley’s greatest philanthropists, he commissioned 11 iconic buildings, including the Campanile. The latter was funded by a life income gift from Jane K. Sather, the university’s first charitable trust. Today, The Benjamin Ide Wheeler Society honors this past president’s vision and the generosity of Berkeley’s planned-giving donors, both past and present. See recent photos of the society’s July luncheon at Wheeler’s Corner on the next page.
Wheeler’s Corner

Highlights from the 30th Annual Wheeler Society Luncheon

The annual Wheeler Society Luncheon offers members the opportunity to connect with old friends and new, mingle with campus leaders, and hear from an esteemed faculty member or the current chancellor. Close to 400 members attended this year’s event, a record gathering. Left photo: newly appointed Chancellor Carol Christ (center) with Carol Jackson Upshaw (left) and Windy Carole Margerum ’21, from the College of Natural Resources (right). Right photo: alumni and friends from the School of Optometry (left to right, first row: Karen Simmons, Lawrence Thal, Esther Thal; back row: Curtis Simmons ’82, Dawn Block, Michael Harris ’65, Roselyn Eng, Chancellor Carol Christ, Weylin Eng ’65, Charmaine Eng ’63, Doris Chun, and Stephen Chun ’70.

Life Income Gifts at Work!

Over the last decade, life income gifts to Berkeley have generated $81,904,967 — providing critical resources for our students, faculty, academics, and infrastructure. We are deeply grateful to our donors for their generosity and support.

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GO BEARS, GO GREEN!

Sign up at calfutures.berkeley.edu to receive Cal Futures electronically. You can also view, download, and share past issues.

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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How will you make a difference?

Discover the benefits that await you when you help ensure Cal’s future. Return this form for more information.
Please contact me about:

**Gifts Cal can use today**
- [ ] Cash/Securities/Mutual Funds
- [ ] Real Estate ($250,000 net minimum)
- [ ] IRA Charitable Rollover

**Gifts that pay you income**
- [ ] Cash/Securities/Mutual Funds ($20,000 minimum)
- [ ] Real Estate ($250,000 net minimum)

**Gifts that take effect at your passing**
- [ ] Retirement Plans — IRA/401(k)/403(b)/other
- [ ] Will/Living Trust Gifts
- [ ] Brokerage Accounts
- [ ] Life Insurance
- [ ] Real Estate

☐ I have already included Cal in my estate plan.

☐ I am not sure which gift plan would work best.

Please contact me.

Name __________________________________________
Address _________________________________________
_______________________________________________
Phone _________________________________________
Email __________________________________________
The best time to reach me ________________________