



# CAL FUTURES

Legacy Giving for Lasting Impact

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## Maximize Your Legacy: A Simple Way to Give Back

Beneficiary designations are a simple and straightforward way to have a future impact at UC Berkeley by gifting assets from your estate like retirement plans, life insurance proceeds, brokerage and bank accounts, and donor-advised funds. This powerful gift planning strategy offers maximum flexibility during your lifetime — and potential tax savings for your loved ones and/or your estate.

### Key Advantages of Designating UC Berkeley

**Simplicity and Flexibility.** Changing your beneficiaries is as easy as filling out a new form with your plan administrator — there's no need for an attorney to revise legal documents. You maintain full control over the assets during your lifetime.

**Tax Efficiency.** Retirement accounts, in particular, can be heavily taxed if left to someone other than a surviving spouse. By designating a charity like UC Berkeley, the funds pass to the university completely tax-free, allowing your loved ones to inherit other, less-taxed assets.

**Lasting Impact.** A beneficiary designation ensures that your commitment to UC Berkeley continues, allowing us to sustain our enduring mission to deliver exceptional education and research opportunities to our students and faculty for years to come.

### What Are My Options?

- Retirement accounts
- Life insurance that is no longer needed
- Brokerage and bank accounts
- Donor-advised funds

**Maintaining Your Designations.** Be sure to review your beneficiary designations periodically as part of your overall estate planning. This ensures your assets will be distributed according to your wishes.

**Take the Next Step.** UC Berkeley's Office of Gift Planning charitable planning professionals can work with you and your financial advisers to explore charitable giving strategies that support your family and financial goals now and in the future. ■

### DID YOU KNOW?

#### Taking Tax Considerations Into Account

Gifting a traditional IRA to a charity is often more tax-efficient than leaving it to your adult children. Why? **Tax efficiency.** When children inherit an IRA, they pay income tax at their own rate. Charities, however, are tax exempt — meaning that 100 percent of the funds benefit the cause.

**Best strategy?** Leave heavily taxed assets like IRAs to charity, and tax-advantaged assets like real estate or stocks to adult children, which receive a "step-up in basis" to current market value.

To learn more, please contact the Office of Gift Planning at [ogp@berkeley.edu](mailto:ogp@berkeley.edu) or 510.642.6300. ■

## Have you considered

making a gift to Berkeley now  
that allows you to maintain  
control of your assets?

Join fellow Bears in downloading our "Your Estate Plan" guide at [planyourlegacy.berkeley.edu/resources](https://planyourlegacy.berkeley.edu/resources). There you will find clear steps on making a designated or unrestricted gift to Berkeley via your will or living trust.

# Robert Bergman

## A Lifetime of Curiosity, Teaching, and Giving Back

By Jonah Charney-Sirott

When **Robert “Bob” Bergman** arrived at UC Berkeley in the summer of 1977, he was already a full professor at Caltech with a landmark discovery to his name. But while his research group was growing fast, his lab space was not, and an enticing offer promised to change both. Berkeley promised to double his lab space, recruit a fellow organometallic chemist alongside him, and offer proximity to the Lawrence Berkeley National Laboratory. He and his wife, Wendy, spent time traveling in Northern California before making the decision together.

**That joint decision launched what would become nearly five decades at Berkeley**, a career defined not only by groundbreaking research but by a deep commitment to teaching, mentorship, and public service. Born in Chicago and educated at Carleton College in Minnesota, Bergman earned his Ph.D. at the University of Wisconsin before a postdoctoral fellowship at Columbia and his rapid rise through the ranks at Caltech.

By the time Berkeley came calling, he and his graduate student coworker Richard Jones had already discovered the thermal cyclization of enediynes. More than a decade later, researchers at a pharmaceutical company discovered



PHOTO COURTESY OF ROBERT BERGMAN

that the same transformation played a crucial role in DNA cleavage, and it is now the basis for a class of anti-cancer drugs. The scientific community has come to know this process as the Bergman cyclization.

“I think any time a scientist thinks up something, and then it actually turns out to work, that’s where a lot of the satisfaction of being a scientist comes from,” Bergman reflects. That satisfaction deepened at Berkeley, where his research expanded into organometallic chemistry and catalysis. Using compounds that combine organic molecules with metals, Bergman’s group discovered a way to transform simple hydrocarbons, the cheap and abundant molecules found in petroleum and natural gas, into organometallic compounds by cleaving their carbon-hydrogen bonds. This allowed Bergman and others to turn these compounds into valuable substances like pharmaceuticals. More recently, others have applied the same reactions in reverse, breaking complex molecules back down into reusable components. “This is a contribution to what is now being called sustainable chemistry,” Bergman explains, “because you don’t want to just throw things away when you’re done with them.”

For all his achievements in the laboratory, **Bergman is equally passionate about what happens in the classroom**. He has received teaching awards from both Caltech and Berkeley, and he speaks about communication with the conviction of someone who has spent a lifetime refining it. “There are professors who just stand in front of a blackboard or a computer screen and never make eye contact with the classroom,” he says. “That’s not really teaching.”



PHOTO COURTESY OF ROBERT BERGMAN

When Bergman transitioned to emeritus status in 2016, he had no intention of disappearing. He continued attending a colleague’s group meetings at the students’ request, writing recommendation letters, and supporting BASIS (Bay Area Scientists Inspiring Students), the community outreach program he helped launch in the late 1990s. That program has grown to include some 700 to 800 graduate students making presentations in elementary and secondary school classrooms.

### He and Wendy had long talked about what they wanted to leave behind.

Both had benefited from institutions that took chances on them, and both believed in returning what they could. Together, the Bergmans decided to split their estate equally between their family and the educational institutions that shaped their lives: Carleton, Wisconsin, and Berkeley. “We both felt that we owed something to the educational institutions that helped us learn what we needed to learn and do what we wanted to do,” Bergman says. “Wendy was always a dedicated teacher, and I felt that way, too.”

Wendy passed away in September 2024 at the age of 81, after nearly 60 years of marriage. The Wendy S. Bergman Fund for the Department of Chemistry, established at Berkeley through a beneficiary designation, will support

teaching and research in organic, organometallic, and inorganic chemistry. It is both a tribute to her and an expression of a belief they carried together throughout their lives.

Bergman is frank about why he believes more people should consider legacy giving. “It doesn’t require any present cost,” he says. “And it lets you keep supporting the things you care about long after you’re gone.” He points to the steady decline in state funding for public universities and the ever-growing demands placed on institutions like Berkeley. “It seems to me that any intelligent person would understand why private giving to places like Berkeley is really important,” he says. For Bergman, the logic is simple, the obligation clear, and the legacy, like the reactions that bear his name, designed to keep working long after the initial spark. ■

*“We both felt that we owed something to the educational institutions that helped us...”*

### PLAN YOUR IMPACT

## Incapacity Planning: Why Should You Plan for It?

Most people think of estate planning as arranging for the disposition of their assets when they die. Not true. American life expectancy has increased by 21 years in the past century, rising from 57–59 years old in the 1920s to 79 years old as of 2025. This is due in part to declines in infectious disease, improved medical technology, and reduced child mortality.

As we grow older, we face the reality that before we die, we may become mentally or physically incompetent for some time. If your health deteriorates and you are unable to make financial or medical decisions, another adult must have legal authority to make these choices for you.

There are a couple of ways to deal with this possibility: 1) do nothing, or 2) create legal documents controlling how your affairs should be handled should you become incapacitated.

If you do nothing, a judge will appoint a conservator or guardian to make decisions for you. This process is expensive and time-consuming. Alternatively, you can save time and money by taking the time to create an **advanced health care directive** that provides binding instructions regarding your medical treatment. And with a **durable power of attorney** for finances, you can authorize someone to manage your financial affairs. Both of these documents can be completed in as little as one hour and can save you time, money, and aggravation — while providing peace of mind.

For more information, please contact the Office of Gift Planning. ■

# The Benjamin Ide Wheeler Society

## What will your legacy be?

The **Benjamin Ide Wheeler Society** is UC Berkeley's distinguished community of visionary alumni, friends, and supporters who choose to see beyond the present and invest in the future of the university. By naming Berkeley as a beneficiary of a will, living trust, retirement plan, or life insurance policy — or by setting up a life income gift — you leave a lasting legacy that helps advance Berkeley's mission of teaching, research, innovation, public service, and societal impact.

Founded in 1987, the Wheeler Society is named for Benjamin Ide Wheeler, who served as president of the university from 1899 to 1919. He transformed Berkeley from a small western public university to one of the most distinguished centers of learning in the nation and world. He was also responsible for arranging the first life income gift to the University of California — a charitable trust from Jane K. Sather, the remainder of which was used to build the Campanile.

To learn how a gift through your estate can help establish your legacy at Berkeley, please contact our office. If you have already included Berkeley as a beneficiary of your estate but have not yet informed us, please let us know so that we can recognize your generosity and ensure your gift is used as you intend. We can be reached at 510.642.6300 or by email at [ogp@berkeley.edu](mailto:ogp@berkeley.edu).

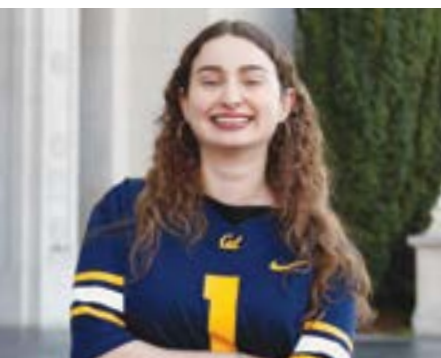


PHOTO: STANLEY LUO/UC BERKELEY

## YOUR SUPPORT MAKES IMPACT

### Victoria Hernandez Padilla: A Student's Story

By *Yesenia Ochoa*

Growing up in Sonoma, California, **Victoria Hernandez Padilla** always felt like she was too much. Too curious, too loud, too bold. She was always asking questions. As a toddler before she'd learned

English, she'd spend hours arranging bright magnetic letters on the fridge, asking her mom again and again if it spelled a word.

Victoria's parents met in Jalisco, Mexico, and later immigrated to Sonoma. They worked long hours in restaurants and other service jobs, and although they did the best they could, Victoria felt isolated. She and her twin sister and younger brother were mostly left to support themselves and their future plans.

But she did have the support of her community. "Looking back, I jokingly call it 'A community project: getting Vicky into a good school,'" she laughs. Teachers, counselors, volunteer tutors — they all saw her spark, her desire to learn. They gave her rides to the SATs, helped her apply

to college, and accompanied her to participate in the UC Berkeley Regents' Overnight Host Program.

Now a second-year student at Berkeley, Victoria is majoring in political economy and sociology. She's passionate about addressing systematic inequalities that her family and community face, like disproportionate academic advantages, and is learning how to take meaningful action.

She's also a Regents' and Chancellor's Scholar, one of a handful of students chosen for Berkeley's most prestigious scholarship awarded to undergraduates. The scholarship connects recipients to a network of students and faculty who support their professional development. As a coordinator of the Regents' overnight program, she shows low-income high school students what Berkeley has to offer and connects them to a community "that believes in their academic potential," she says.

At Berkeley, Victoria feels supported and challenged in a way she hasn't before. "Berkeley not only embraces my curiosity, but it pushes me to be even louder with my questions," she says. "Being at Berkeley makes me believe that I can truly be someone, and grow into the person I want to be." ■

*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. © 2026 by The Regents of the University of California.*

[ogp@berkeley.edu](mailto:ogp@berkeley.edu) | [planyourlegacy.berkeley.edu](http://planyourlegacy.berkeley.edu) | 510.642.6300

Office of Gift Planning, University of California, Berkeley

**Have you considered designating UC Berkeley as a beneficiary of your retirement plan, will, or living trust?**

**Discover the benefits that await you when you help ensure UC Berkeley's future.**

**Visit [gobears.me/CFinfo](https://gobears.me/CFinfo) to request more information.**