



CAL FUTURES

Legacy Giving for Lasting Impact

SPRING 2025 | ISSUE 2



PHOTO BY KEEGAN HOUSER

Do your children have an estate plan?

Upon retirement, we may be concerned about the future financial security of our dependents. We know how critical it is to have a will in place, and we want our adult children to be prepared in case the worst happens prematurely (especially if there are grandchildren). It's important to know that if your children pass without a will (intestate), the division of their assets is determined by state laws rather than their personal wishes.

By encouraging the creation of an estate plan, you help your children:

- ensure financial stability for their dependents.
- prevent unnecessary legal fees, court delays, and government intervention.
- minimize uncertainty and stress during a difficult time.
- establish a legacy by identifying organizations they wish to support with donations.

For more information on how to assist your children in planning their estate (or to get started on your own), please visit planyourlegacy.berkeley.edu/resources. ■

DID YOU KNOW?

The Office of Gift Planning welcomes Deputy Director **Becky Thompson!**

Becky has 28 years of advancement leadership experience — prior to joining our team, she served as executive director of philanthropy at Sutter Health. She currently serves as immediate past president of the Planned Giving Forum of Greater Sacramento and is a member of the Sacramento Estate Planning Council. Becky received her B.A. in journalism from Franklin College of Indiana and holds a certification in planned giving from Long Beach State. She lives in Carmichael, CA with her husband, her two children (and four rescue dogs) and enjoys gardening, hiking along the American River, and reading. Welcome Becky! ■



PHOTO BY RYAN GREENLEAF

What will your legacy be?

Join fellow Bears in downloading our “Your Estate Plan” guide at 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.



Joanna Williams
Silk Road Pioneer

PHOTO COURTESY OF THE ESTATE OF JOANNA WILLIAMS

The late **Joanna Williams** was a pioneer in the study of South and Southeast Asian art and architecture whose deep scholarship and iconoclastic teaching style touched generations of Berkeley scholars. By leaving a gift in her will to establish the Juggernaut Fund, Williams provided a flexible source of support for scholars exploring a vast and varied territory of art, history, religion, and culture. In particular, the fund supports scholars of the trade routes known collectively as the Silk Road, which connected far-flung points from China through India and Central Asia and, by maritime routes, through Japan and Southeast Asia.

In 1967, after completing her dissertation at Harvard, Williams took a joint appointment at Berkeley's

Departments of History of Art and South and Southeast Asian Studies. The political situation at that time prevented her from traveling to Khotan, a site on the Silk Road that had been the focus of her dissertation. Since China opened to the United States in the late 1970s, there has been an upswing in scholarly interest in the Silk Road and the regions it winds through.

"[The Juggernaut Fund] is designed to encompass Indic cultures writ large," says Professor Emerita of Chinese Art Patricia Berger, a former student of Williams who became a friend and colleague. Berger noted that the fund amplifies the impact of Berkeley's Tang Center for Silk Road Studies, which has significantly contributed to the growing academic interest in Central Asia. Like the pathways that connected ancient civilizations and transmitted philosophies along with goods, Williams's estate gift will sustain a breadth of projects. "Joanna was interested in the whole area. She decided the money should be available for faculty and student research as well as public events — that its purpose should be decided by the center's board."

As a teacher, Williams is remembered

for her depth of knowledge and her playfulness. She often invited weavers, musicians, and other artists to visit her classes to demonstrate their craft. She was also deeply connected to the Bay Area arts community, serving as an advisor for exhibitions at the Phoebe A. Hearst Museum, the Berkeley Art Museum/Pacific Film Archive (BAMPFA), the San Francisco Society for Asian Art, and the Society for Art & Cultural Heritage of India (SACHI).

Williams named the fund after the Hindu holiday that she loved and that is reflected in the artifacts she collected. A celebration of the power of a divine presence in the mundane world, Juggernaut is associated with the movement of an unstoppable force. Now, thanks to Joanna Williams's generosity and leadership, coming generations of UC Berkeley scholars will be empowered to move toward their scholarly goals and explore the beauty and complexity to be found along the Silk Road. ■



PHOTO COURTESY OF THE ESTATE OF JOANNA WILLIAMS

PLAN YOUR IMPACT What should I prepare before meeting with an estate planning attorney?

Follow the steps below:

Step 1: Inventory your financial situation by making comprehensive lists of the following:

- ☑ Assets: Include bank, retirement, and brokerage accounts, life insurance policies, and real estate.
- ☑ Liabilities: Include loans, debt, medical bills, and business obligations.

Step 2: Identify beneficiaries and distribution preferences by answering the following questions:

- ☑ Who should inherit your assets?
- ☑ How should the assets be divided? (Equal shares, specific bequests, trusts for minor children)

Step 3: Choose your key decision makers:

- ☑ Executor of the will: This person will handle your estate after you pass.
- ☑ Guardian for minor children: Choose someone you trust to raise your children if necessary.
- ☑ Power of attorney: Someone to make financial and medical decisions if you become incapacitated.

Step 4: Gather important documents:

- ☑ Existing wills or trusts
- ☑ Deeds to real estate properties
- ☑ Life insurance policies
- ☑ Retirement account statements (401(k), IRA, pension)
- ☑ Business agreements (if applicable)
- ☑ Marriage or divorce certificates
- ☑ List of digital accounts and passwords (optional but helpful)

Step 5: Consider additional estate planning documents:

- ☑ Living trust: Helps avoid probate and provides more control over asset distribution.
- ☑ Advance healthcare directive (living will): Outlines medical preferences in case of serious illness.
- ☑ HIPAA authorization: Allows designated individuals to access your medical records.

By completing these steps before your meeting, you'll ensure a smooth estate planning process and a clear, legally binding plan that protects your loved ones and assets. ■

Don't forget to ask:

How can charitable giving optimize estate planning?

Should I set up a trust for my beneficiaries?

How often should I update my estate plan?

What happens if my executor or guardian is unable to serve?



Cal Fact Envelope Answer

In the early 1900s, which article of clothing — the grungier the better — was a status symbol for Berkeley students?

One of the early campus trends was for students to wear top hats known as “plugs,” which they purposely beat up and decorated.



PHOTO COURTESY OF UNIVERSITY ARCHIVES, THE BANCROFT LIBRARY

“Thanks to Joanna Williams’s generosity, coming generations of Berkeley scholars will be empowered to move toward their goals.”

The Benjamin Ide Wheeler Society

We're pleased to share that the 2025 Wheeler Society Benefits Booklets have been distributed to all members. If you haven't received yours yet, please contact our office. Mark your calendars for our signature event: the 2025 Annual Wheeler Society Lecture and Luncheon will be held on Tuesday, July 29. The Office of Gift Planning and Chancellor Lyons are looking forward to seeing Wheeler members this summer! Please be on the lookout for the formal invitation, which will be mailed in June.



PHOTO BY KEEGAN HOUSER

YOUR SUPPORT MAKES IMPACT

Object Lesson: A pass to potential

Ashlie Alvarez Simms '26, a first-generation student studying cognitive science, often compares her experience to that of her sister, who attends an historically Black university in Louisiana. "We grew up in the same house, but we live completely different lives," she says, noting that their unique college experiences have shaped their perspectives and goals in distinctive ways. Even hearing Congresswoman Barbara Lee speak on campus last year was a wow moment.

Deeply involved in the Associated Students of the University of California, Alvarez Simms thrives on supporting her fellow members, such as "promoting office bonding, collaboration, and civic engagement" and helping them successfully execute their ideas. Besides "making a big, lasting impact on the campus," she says, working in student government means she is "changing the status quo of what it means to be first-generation."

Thanks to a scholarship and acceptance into Cal in the Capital, Alvarez Simms interned last summer at a nonprofit consumer advocacy

organization in Washington, D.C. While her communication skills grew, she says the D.C. environment "did not provide the supportive and inclusive experience I had hoped for." She now feels drawn to nonprofits, where she can build a more direct and "special relationship to the community."

Even though politics are not for her, the pass she received touring the House of Representatives signifies her potential. "If you told me that I was going to be spending a summer in D.C., I would have said, 'No way,'" she says. "Berkeley has given me so many opportunities that I hadn't even dreamed of." ■

By Amy Cranch. Originally appeared in the fall/winter 2024 issue of *California* magazine.

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. © 2025 by The Regents of the University of California.

ogp@berkeley.edu | planyourlegacy.berkeley.edu | 510.642.6300

Office of Gift Planning, University of California, Berkeley

Have you considered making a gift to Berkeley in your will or living trust?

Discover the benefits that await you when you help ensure Cal's future.

Visit gobears.me/CFinfo to request more information.