

Annual Report
of **PHILANTHROPY**

2011 / 2012

BerkeleyLaw
UNIVERSITY OF CALIFORNIA
Boalt Hall

Contents

The 2011–2012 Annual Report of Philanthropy lists donors who made gifts to Boalt Hall in fiscal year 2012. It can be found online at law.berkeley.edu/102.htm. Every effort has been made to ensure accuracy, and we apologize for any errors or omissions. Please send corrections to:

Boalt Hall Alumni Center
University of California, Berkeley
School of Law
2850 Telegraph Avenue, Suite 500
Berkeley, CA 94705-7220

Or contact us at 510.642.2590 or bhf@law.berkeley.edu. If you would like to make a donation to Boalt Hall, please use the enclosed envelope to make your contribution or visit give.law.berkeley.edu.

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MESSAGE FROM THE DEAN



When we launched the \$125 million Campaign for Boalt Hall in 2005, it raised more than a few eyebrows. Our target, after all, was 10 times larger than the law school's previous record campaign. But given our remarkable community of alumni and friends, and the great possibilities we could see for the school, it seemed to me that a bit of audacity was appropriate.

Sure enough, the many alumni who hold Boalt close to their hearts, and friends who value our mission, have lifted our law school to unprecedented heights. Over the past century our physical complex has never looked better, and the far-reaching research, scholarship, and policy work done here are flat-out astounding—it never fails to impress when I rattle off a list of examples. I am deeply grateful to the donors who have helped us to soar.

With \$14.1 million in contributions during the fiscal year ended June 30—more than 34 percent higher than the year before—we are able to strengthen several core areas that make us the planet's best public law school: financial aid, faculty recruitment and retention, our research centers and "live-client" clinics, and our professional skills programs.

This year, we hope to have a strong finish. As we watch the ball drop on Boalt's first century, the Campaign for Boalt Hall's finish line is also in our sights, less than \$17 million away. And what a Centennial year it's been.

We added two new research centers to our stable of action-oriented think tanks designed to be a two-way bridge between the world of ideas and the world of complex private sector and public sector problems: The California Constitution Center and the Center on Reproductive Rights and Justice. We extended our global reach through broadened curricular and field placement opportunities, partnerships with prominent universities abroad, and expansion of our Professional LL.M. program serving lawyers from 40 countries during the summer. We revised our Loan Repayment Assistance Program to protect participants from negative amortization risks should they leave public interest work before qualifying for full loan forgiveness, which generally takes 10 years of such employment. And we bolstered what were already top national programs in intellectual property, environmental, business, and international law.

Naïve we are not. Continued cuts to our state funding are an ongoing challenge: the average 2012 Boalt graduate owes more than \$112,000 in student loans (plus undergraduate debt), and tuition will continue to be over \$50,000 for both out-of-state and California residents. But I can't find the superlatives to describe how exciting our students are and the excellence of the faculty who lead them in discovering the law. I am fully confident about our future, and we will work hard to convince the past generations who have benefited from this institution to invest in a future of excellence for students and faculty to come.

As we labor in this homestretch of the Campaign for Boalt Hall, I once again extend my deepest thanks for all you've done to get us this far—and for the inspiration and resources you provide to help us fulfill our mission. It is an honor to be your Dean at this time of challenge, accomplishment, and celebration.

A handwritten signature in black ink, appearing to read "Christopher Edley, Jr."

CHRISTOPHER EDLEY, JR.

The Honorable William H. Orrick, Jr. Distinguished Professor and Dean

THE CAMPAIGN FOR BOALT HALL

A Message from the Campaign Co-chairs



Private support plays a vital role in making Boalt one of the nation's top law schools. Thankfully, our inspiring alumni and friends have helped solidify our standing while state funding of higher education continues to plummet.

This special Centennial year provides a unique opportunity to convey our gratitude for all that Boalt has given us. With less than \$17 million left to complete the \$125 million Campaign for Boalt Hall, we hope to finish our first century—and the campaign—with a flourish.

Thank you for supporting our law school.

ELIZABETH CABRASER '78, LEO PIRCHER '57, and PAMELA SAMUELSON
Co-chairs, The Campaign for Boalt Hall

LEADERSHIP GIVING: 2005–2012

\$2,000,000 and above

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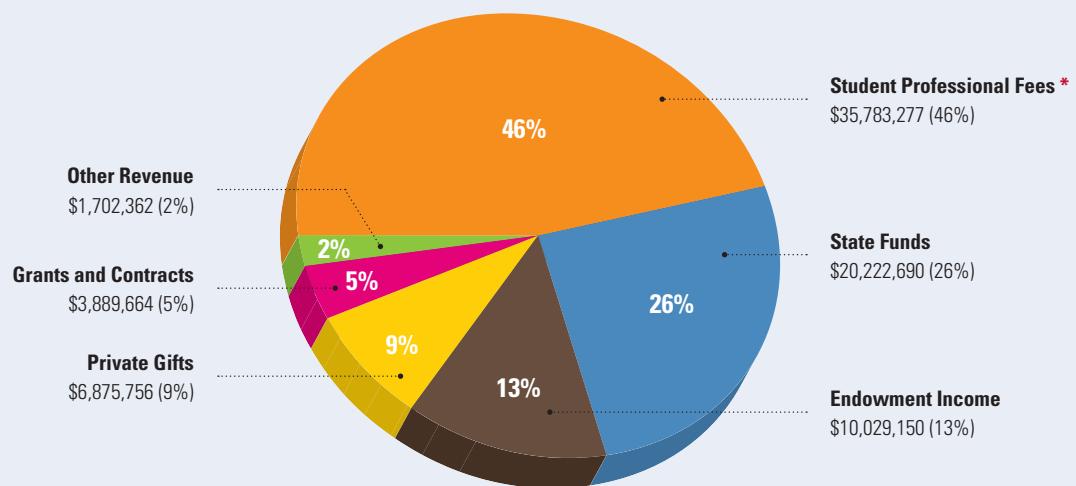
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FINANCIAL SUMMARY

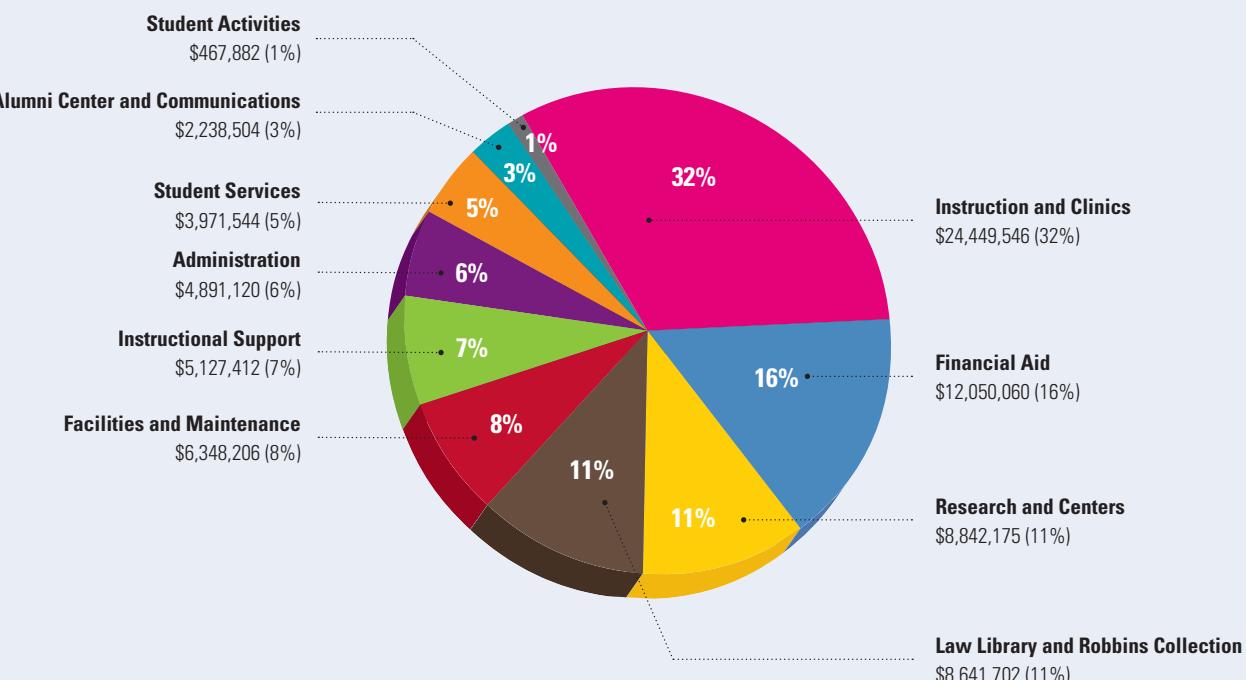
Where the Money Comes From: Boalt Budget Sources - Fiscal Year 2012



Percentages do not equal 100% due to rounding

* The portion of tuition that stays at Boalt for our use

Where the Money Goes: Boalt Budget Allocations - Fiscal Year 2012

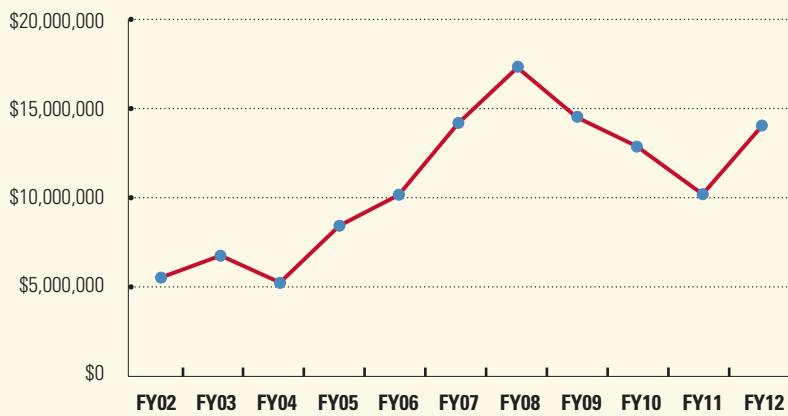


FINANCIAL SUMMARY

Philanthropic Funding FY12

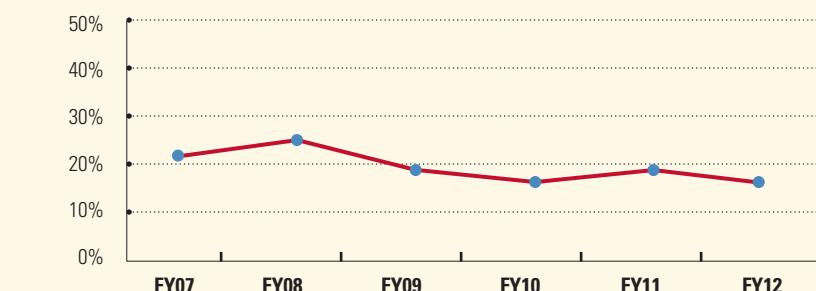
Boalt Hall Funds	\$1,795,561.46	Research Assistants	\$500.00
Building Funds	\$52,845.00	Student Awards	\$10,973.75
Centers & Programs	\$6,787,359.02	Student Loans	\$17,276.00
Clinical Education	\$1,683,962.28	Student Organizations	\$54,328.44
Endowed Chairs	\$1,452,225.20	Student Scholarships	\$1,474,888.40
Faculty Support	\$385,959.00	Summer Fellowships	\$345,585.95
Law Library	\$63,241.00	Unrestricted Endowment	\$3,681.76
Miscellaneous	\$179.94	TOTAL	\$14,128,567.20

Philanthropy Trajectory FY02 - FY12



Fiscal Year	Total Philanthropy
FY02	\$5,531,507
FY03	\$6,758,513
FY04	\$5,242,956
FY05	\$8,439,199
FY06	\$10,170,500
FY07	\$14,192,005
FY08	\$17,336,986
FY09	\$14,727,454
FY10	\$13,577,628
FY11	\$10,523,077
FY12	\$14,128,567

Alumni Participation Rates FY07 - FY12

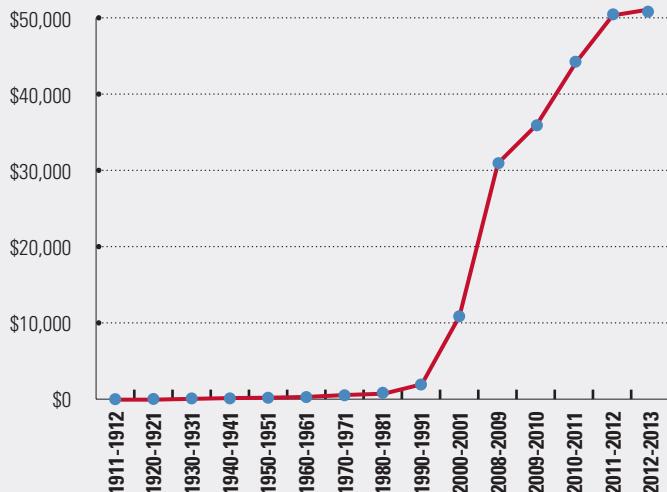


Fiscal Year	Participation Rate
FY07	23%
FY08	25%
FY09	19%
FY10	17%
FY11	19%
FY12	17%

FINANCIAL SUMMARY

Tuition During Boalt's First Century

California Resident Tuition Trajectory

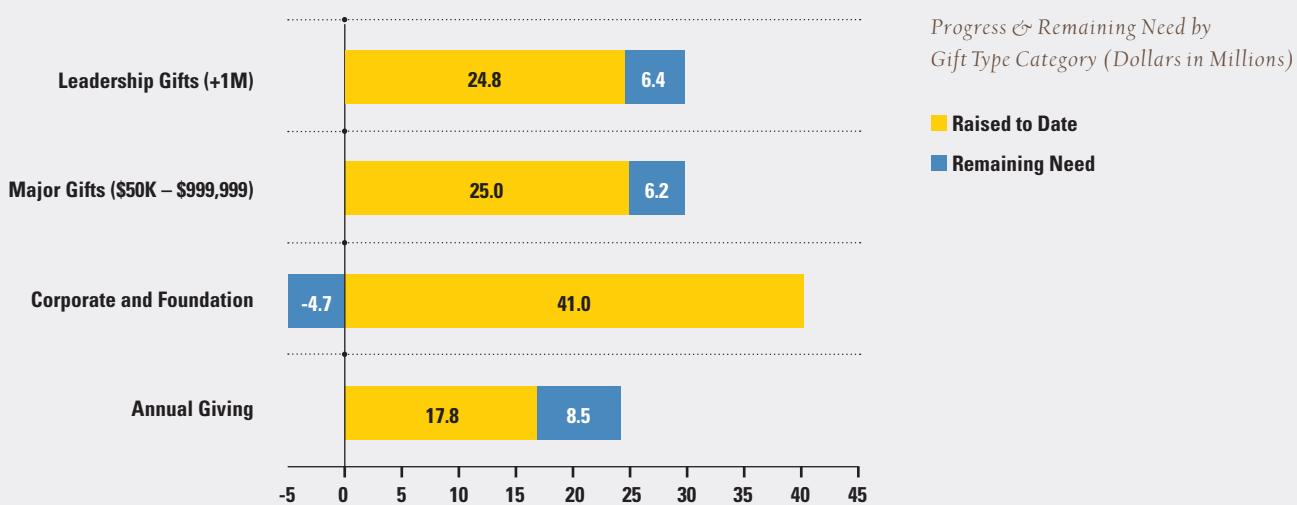


* Total fees include health insurance

Year	California Resident Tuition	Out-of-State Tuition
1911-1912	Free	\$20
1920-1921	\$25	\$45
1930-1931	\$100	\$225
1940-1941	\$105	\$240
1950-1951	\$185	\$370
1960-1961	\$273	\$637
1970-1971	\$511	\$1,711
1980-1981	\$837	\$3,237
1990-1991	\$2,482	\$7,717
2000-2001	\$10,865	\$21,615
2008-2009	\$30,944	\$43,189
2009-2010	\$35,907	\$48,152
2010-2011	\$44,244	\$52,244
2011-2012	\$50,163	\$54,370
2012-2013	\$50,399*	\$54,350*

The Campaign for Boalt Hall

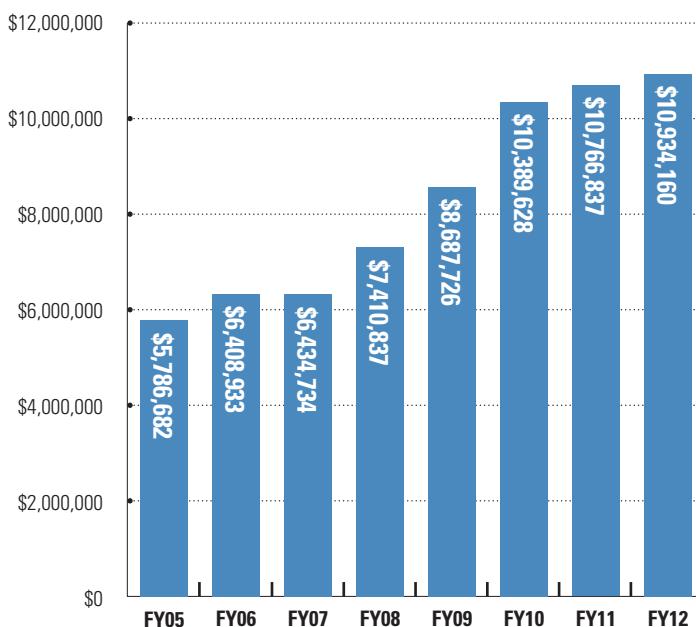
Total Raised through September 30, 2012: \$108.6 Million



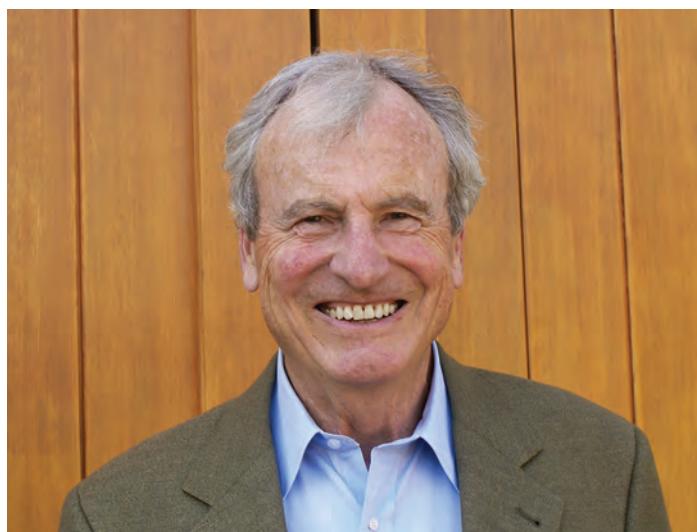
CAMPAIGN PRIORITIES: FINANCIAL AID

Boalt Hall is committed to providing one of the best suites of financial aid programs of any top law school. We help incoming students obtain grants, fellowships, and scholarships based on need and merit, as well as an array of federal and private student loans. Several scholarships and fellowships are also made available to continuing students each year from within and outside of Boalt. In response to tuition hikes, we have increased financial aid expenditures every year since 2005.

Financial Aid Expenditures

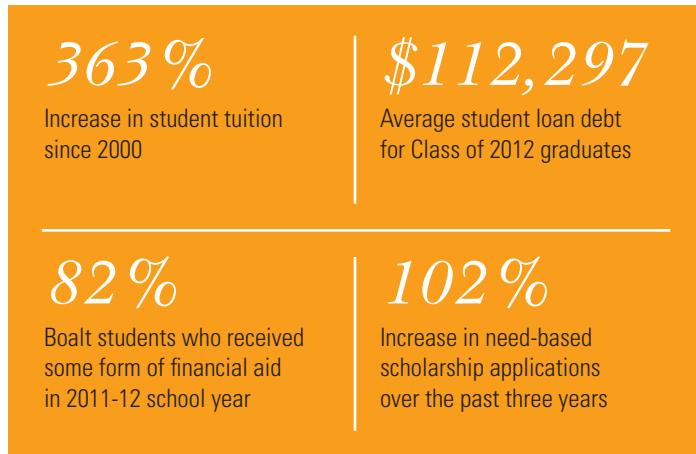


Figures include scholarships, grants, summer fellowships, and post-graduate Bridge Fellowships.



CAM BAKER '61 assisted in his class reunion campaign hoping that personal contact with classmates would make them feel more connected with Boalt after all these years. "Between emails and follow-up phone calls, eventually I was able to contact everyone assigned," Baker says. "You just have to be persistent." A 20-member reunion committee deftly co-chaired by Scott Carey and Tom Klitgaard raised more than \$310,000 for financial aid.

Baker, now managing Larkmead Vineyards in the Napa Valley, received financial aid at Boalt. "Our tuition was so low" he says. "When you look at tuition today and realize just how lucky we were, it's incumbent upon all of us to pay back at least in some small way and help ease the huge financial burden on current students."



Loan Forgiveness

Our loan repayment assistance program, for graduates who pursue public interest work, now protects them from negative amortization if they leave such employment before qualifying for full loan forgiveness. Alumni with a qualifying job at a salary under \$65,000 for 10 years have no student-loan obligation. Those earning up to \$100,000, or who work in public interest for less than 10 years, receive partial support.

Summer Fellowships

Boalt's Summer Fellowship Program provides \$4,000 grants to students who secure unpaid summer internships in public interest, nonprofit, or government sector law. Second-year students completing a second summer of qualifying work may receive an additional \$2,000.

Summer Fellowships 2006-2012

Summer	Total Funding	Number of Recipients
2006	\$451,000	119
2007	\$498,043	132
2008	\$710,000	145
2009	\$751,000	183
2010	\$856,827	224
2011	\$851,788	227
2012	\$731,550	183

CAMPAIGN PRIORITIES: FACULTY RETENTION AND RECRUITMENT

Growing the faculty marked one of Dean Edley's top priorities when he took the reins at Boalt Hall in 2004. Since then, the law school has hired 47 new educators committed to top-tier instruction and legal scholarship.

Contributions to endowed faculty chairs help lower our faculty-student ratio and expand our course offerings. They also help us compete with better-funded law schools to bring in the best new instructors—and to fend off efforts to poach our own star professors.

New Faculty Hires for 2012-13 School Year



ANDREW BRADT

Assistant Professor of Law

Areas of Specialization: Civil Procedure, Conflict of Laws, Remedies

Research focus: How procedural and choice of law systems adapt to large-scale, multi-jurisdictional litigation

Experience: Climenko Fellow and Lecturer at Harvard Law School, two judicial clerkships, litigation attorney at Jones Day in New York and Ropes & Gray in Boston



RACHEL STERN

Assistant Professor of Law and Political Science

Areas of Specialization: The relationship between law, power, social change, and globalization

Research focus: The role courts play in authoritarian states, and the political dynamics surrounding environmental regulation and activism in China

Experience: Junior Fellow at the Harvard University Society of Fellows

FYI: First book, [Environmental Litigation in China: A Study in Political](#)



AMANDA TYLER

Professor of Law

Areas of Specialization: Federal Courts, Constitutional Law, Civil Procedure, Statutory Interpretation

Research focus: The judicial power and habeas corpus

Experience: Professor at George Washington University Law School, two judicial clerkships, attorney at Sidley Austin in Washington, D.C.

FYI: George Leisure Award for Best Oralist in the James Barr Ames Moot



For the **WOLLENBERG FOUNDATION**,

supporting Boalt's faculty is an easy decision. "My father (Roger Wollenberg '42) had a terrific experience there and almost all our donations go toward education," says co-trustee Chris Wollenberg. "He initiated the annual contribution, and we're happy to help Boalt maintain its teaching excellence."

Roger clerked for U.S. Supreme Court Justice William Douglas after World War II and worked for the Justice Department's Antitrust Division. He then went into private practice, helped found Wilmer, Cutler & Pickering in 1962, and became president of the Federal Communications Bar Association as TV and radio began permeating the culture.

Another accomplishment Chris notes with pride: Roger's many years on the Falls Church (VA) School Board, most as chair. "He helped usher in integration in the school system at a time when other Virginia school systems were practicing massive resistance, even to the point of shutting down," Chris says. "Education always meant a great deal to him."

Faculty Hiring Since 2004



CAMPAIGN PRIORITIES: CONSTRUCTION AND RENOVATION

Even before Dean Edley came to Boalt, he heard how the law school's convoluted physical space was "fast becoming the Greyhound bus station of law schools." Eager to change that perception—and reality—he set about upgrading Boalt's largest lecture halls and main library reading room.

In 2008, guided by Associate Dean Kathleen Vanden Heuvel '86, the school ramped up its renovation efforts. Three years later, Boalt put the finishing touches on the glimmering South Addition as well as new classrooms, throughways, study rooms, and student space.

As we celebrate our Centennial this year, these newly-completed projects present unique naming opportunities to become part of Boalt's legacy—and to have the law school recognize impactful contributions for generations to come. To help name our exciting new spaces, please contact Robert Sproul, Assistant Dean of Development, at 510.643.8170 or rsproul@law.berkeley.edu.



When athletic department budget woes put Cal's baseball program on life support last year, **STU GORDON '65** led an inspired fundraising drive that not only revived the team, but helped propel it to the College World Series. "I believe in miracles," he says.

At Boalt Hall, many thought it would take a miracle to transform an antiquated and disjointed physical complex. Last year, the ambitious overhaul finished on time and on budget. "When I was president of our alumni association several years ago, people were impressed with everything Boalt had to offer except its facilities," Gordon says. "It meant a lot to participate in fundraising efforts and contribute my own funds to help change that."

Well-versed in building success—the co-founder of Gordon & Rees has grown his firm from 3 lawyers to more than 550 in 27 offices across the country—Gordon sees Boalt's capital improvements as a winning long-term strategy. "Every time I go by the law school I can't believe how beautiful it looks," he says. "It's something I'm really proud of, and Boalt students deserve it."

55,000

Square feet added by the South Addition

170

Percent of suggested capacity of Boalt's library collection before it moved to the South Addition

5,000

Square feet of energy-efficient radiant heating and cooling systems installed in the floors of Café Zeb and the student lounge

36

Glass walking planks that filter light into the library's offices

12

Boalt student journals housed in the new Student Center

CAMPAIGN PRIORITIES: CENTERS

Boalt has added two new research centers to its stable of action-oriented, policy-driven think tanks.

The California Constitution Center, focusing on California's constitution and state supreme court, will develop scholarship on complex policy issues that arise under the state charter. It offers a moot court for lawyers with cases pending before the court, a California Constitutional Law seminar, a yearly journal, and research fellowships.

The Center on Reproductive Rights and Justice promotes innovative teaching and research to help advance policy and assist marginalized populations. Programming includes an annual seminar, a year-long scholarship workshop, a virtual bibliography, and the first legal reader on reproductive rights and justice with national distribution.

Philanthropy Highlights

A major gift from H.H. "Sam" Wheeler, Jr. launched the Wheeler Institute for Water Law & Policy at the Center for Law, Energy & the Environment (CLEE). Support from Deanna Ruth Rutter '72 advanced the center's student programming and energy and water research.

The Human Rights Center received notable gifts from David and Anita Keller, Greg and Liz Lutz, Nadine Tang and Bruce Smith, and Tom White. Among other projects, that support helped advance the use of forensic technologies in criminal prosecutions and in reuniting forcibly adopted children with their families.

A major gift from the Quattrone Foundation enabled the Warren Institute on Law and Social Policy to produce a cost analysis of wrongful prosecutions in California over the past 30 years. The California Endowment also funded an institute project to reduce violence in high-crime neighborhoods and improve the health of those who live in them.

Donations from Ralph Alpert '55, Bob and Colleen Haas, and Joshua Floum and Margaret O'Donnell helped the Henderson Center for Social Justice assess the impact of restorative justice approaches in reducing racial distrust and division. Six Boalt students went to Greensboro, N.C. to conduct research and collaborate with project partners.

Some Funding Priorities

Henderson Center: The Pauli Murray Annual Lecture Endowment to help more students conduct research related to African American girls and young women; research to develop strategies for addressing the changing geography, demographics, and depth of poverty in the Bay Area.

CLEE: An endowed environmental speaker series for law students; expansion of climate change and cap-and-trade policy research; joint projects with the Haas School of Business or Goldman School of Public Policy.

Warren Institute: Civil rights roundtables on education that seek to drive research-based reforms for all high school students to graduate with the skills needed for a successful transition to college and post-secondary careers.



As a student and early in his legal career, **LUKE ELLIS '75** worked in the public defenders' office representing minors in juvenile court proceedings. "We saw a lot of recidivism, but some kids were reachable," he says. "Guiding them in a different direction was so rewarding." To help current Boalt students engage in similar work, Ellis has funded a major project through the Warren Institute on Law and Social Policy.

Ellis, a prominent personal injury lawyer at Gillin, Jacobson, Ellis, Larsen & Lucey, made his generous donation in honor of professor and former dean Jesse Choper. "Over the course of your life you might remember a couple teachers," Ellis says. "But Jesse was a mentor and an inspiration. His passion for the law, and for how law can help society, has stayed with me."

Human Rights Center: Fellowship program that enables UC students to work in the field on issues such as safer outcomes in maternal and infant care, protecting unaccompanied child immigrants, and assisting battered women and torture survivors.

CAMPAIGN PRIORITIES: CLINICS

Students eager to get some real-world experience while doing some real-world good are the fuel that powers Boalt's clinical programs. Our students handle casework in four faculty-directed clinics, take externships with judges, public agencies, and NGOs, and learn the machinery of government through our Washington-based UCDC Law Program.

Philanthropy Highlights

To commemorate the Death Penalty Clinic's 10th anniversary, 99 percent of clinic alumni contributed to its fellowship program. The Kazan Foundation, Loren Lewallen, and Frank Martin '04 were major donors to the program, which assists understaffed capital defense lawyers in the South. Grants from the Atlantic Philanthropies, the Open Society Foundations, and the Tides Foundation helped fund the Lethal Injection Project, which challenged how the death penalty is administered in more than a dozen jurisdictions. The Vital Projects Foundation and Kenneth and Elizabeth Stevens supported both the fellowship program and Lethal Injection Project.

Support from the Y & H Soda Foundation allowed the East Bay Community Law Center (EBCLC) to expand its Immigration Law Clinic staff. A gift from Quinn Delaney and Wayne Jordan helped launch EBCLC's new Policy Advocacy Clinic, which will assist low-income citizens through bill drafting, negotiation and lobbying, administrative rulemaking, and public education campaigns. The Morrison & Foerster Foundation funded a two-year fellowship to help provide reentry services for juvenile offenders.

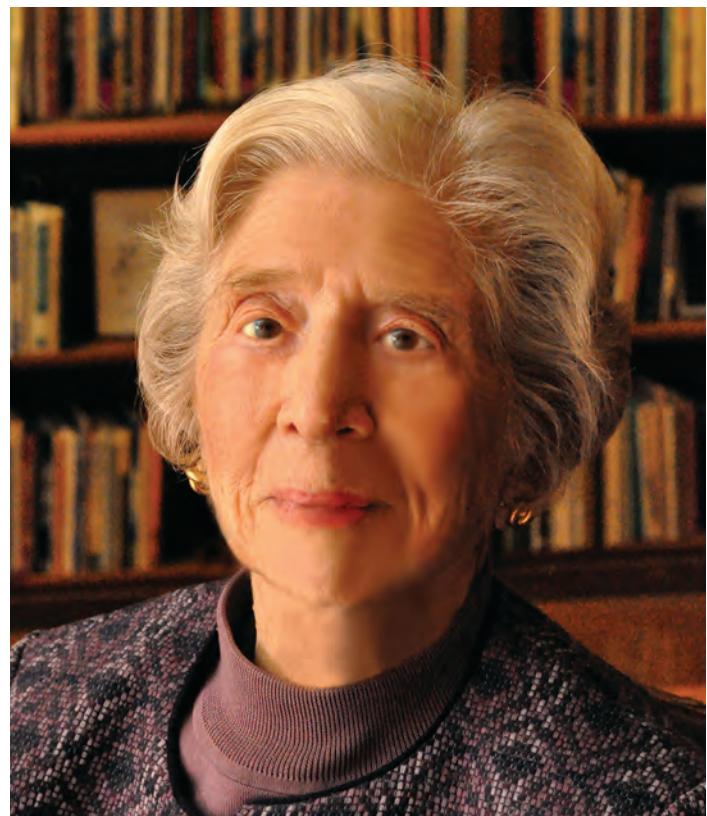
The International Human Rights Law Clinic received significant funding from Werner '53 and Mimi Wolfen and from Greg and Liz Lutz. Their contributions helped the clinic play a lead role in a case that addressed Guatemala's state-sanctioned policy of forced disappearances during its 36-year armed conflict. Clinic students helped prepare experts and witnesses for testimony, drafted cross examination questions and declarations, analyzed reparations options, and researched case law and security force tactics.

The Samuelson Law, Technology & Public Policy Clinic received a generous matching gift from Boalt professor and clinic founder Pamela Samuelson and her husband, UC Berkeley School of Information professor Robert Glushko. That funding enabled the clinic to hire an extra teaching fellow this year. Contributions also helped the clinic work with Privacy Rights Clearinghouse to launch a centralized, interactive online service that lets people share privacy complaints about websites and social networks.

Some Funding Priorities

Death Penalty Clinic: Helping represent clients in cases where courts do not provide ample resources; enhancing the ability to address systemic inequities in how the death penalty is administered.

EBCLC: A two-year, \$1 million campaign to help train emerging lawyers and serve underrepresented clients. The campaign seeks to seed the first six years of a post-graduate fellowship program fund (\$600,000), purchase and outfit a mobile office (\$100,000), lease shared satellite office spaces in Oakland (\$150,000), and invest in enhanced mobile technology (\$150,000).



Alba Witkin

©Peg Skorpinski

During his extraordinary legal career, Bernie Witkin '28 wrote the definitive treatises on California law and influenced countless judges and practitioners as the state Supreme Court's reporter and clerk. Boalt professor and former dean Herma Hill Kay said he "almost single-handedly raised the intellectual standards of the California Bar and judiciary" and helped it "become an example to the nation."

The WITKIN CHARITABLE FOUNDATION

recently honored his memory by supporting Boalt's renovation of workspace and offices for its clinical programs. "I'm pleased to provide this funding in memory of my late husband," says Alba Witkin, Bernie's widow and a longtime philanthropist. "Bernie felt passionately that clinical law experience was of critical importance in preparing students for successful law practice."

International Human Rights Law Clinic: Advocacy and travel funds to expand opportunities for students to work with clients, conduct field investigations, and appear before courts and tribunals.

Samuelson Clinic: Collaborative projects in the areas of digital consumer protection, free expression, privacy, and open access.

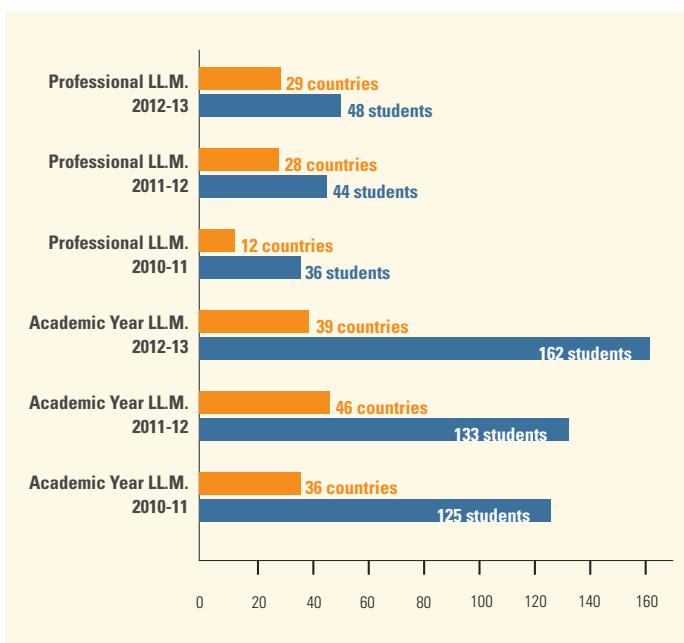
CAMPAIGN PRIORITIES: ACADEMIC PROGRAMS

LL.M. Program

Boalt offers both an academic-year and a professional LL.M. program, which is completed over two consecutive summer semesters. International lawyers learn from prominent full-time faculty, obtain a strong foundation in business law, intellectual property, and core U.S. law courses, and may qualify for the California Bar Exam.

In the academic-year program, students gain knowledge of the U.S. legal system, conduct original research on a specific aspect of law, and enroll in courses also offered to J.D. students. They tailor the program to meet their individual needs, factoring in educational background and career objectives.

In 2009, Boalt introduced its professional LL.M. program—an ideal option for lawyers who prefer not to leave home for a nine-month stretch. As demand grows worldwide for studying and importing American legal culture, Boalt has steadily increased its LL.M. class sizes.



Furthering Boalt's globalization efforts is its International Executive Legal Education program, designed for foreign lawyers, general counsel, corporate executives, government officials, and other professionals. The program also offers training sessions for judges that focus on the U.S. common law and court systems.

The law school continues to strengthen the International Association of Boalt Alumni by increasing membership and networking opportunities. While most members are based in Europe, the organization is extending into China and South America.

Professional Skills Program

In 2008, Boalt's faculty established a coherent program of instruction in professional skills. The program offers an array of simulation courses in areas such as advocacy and litigation, research and writing, negotiation,



JOACHIM ROSENGARTEN '92

says former Boalt professor Richard Buxbaum '53 "made it his passion" to look after LL.M. students. "He taught them in class, gave them advice for life, and respected their foreign culture," Rosengarten says. "He helped them find jobs or funding, and in some cases even helped them find a federal judge so they could get married."

That's why, to commemorate Buxbaum's 50 years of teaching at Boalt, Rosengarten and fellow LL.M. alums Rolf Trittmann '87 and Heribert Hirte '89 created the Richard Buxbaum International Law Students Graduate Fellowship Fund.

A partner at Hengeler Mueller in Frankfurt, Germany, Rosengarten knows full well the value of an LL.M. degree. At his firm, spending one year in an English-speaking country is a pre-condition for being named partner. "With rising tuition, doing that at a top LL.M. program has become more difficult," he says. "I wanted to enable future students to benefit from the Berkeley experience, as I did years ago."

and transactions. Practical training opportunities are provided through practicums, field placements, judicial externships, and pro bono projects.

In 2011-12, professional skills comprised more than 15 percent of Boalt's academic program with a significant portion taught by leading practitioners and judges. The school offered 37 professional skills courses, with 1,749 combined J.D. and LL.M. student enrollments. Other notable figures: 139 students enrolled in externships, 94 in practicums, and 28 in the Judicial Externship Program.

More than 400 Boalt students engage in pro bono practice—often as early as their first semester—through our Student-initiated Legal Services Projects. Strengthened by supervising attorneys and community partnerships, these projects are often led by 2nd- or 3rd-year students.

Unrestricted Giving

The Boalt Hall Fund provides unrestricted support for the law school to strengthen its core programs and address unanticipated opportunities. With the State of California's continued reduction of funding to higher education, we must increasingly rely on the Boalt Hall Fund to bolster our operations and preserve our excellence.

Unrestricted gifts enable the law school to address its most pressing needs in a timely manner. They also allow Boalt to strategize how best to allocate its resources and to get the most out of its education, scholarship, and outreach. In today's rapidly changing legal world, that flexibility is paramount to effectively tackle emerging concerns.

While gifts designated to specific projects are undeniably essential, unrestricted gifts remain vitally important, as they provide an immediate infusion of funds that gives Dean Edley the bandwidth to capitalize on Boalt's highest priorities.

Some examples of where Boalt Hall Fund contributions are allocated include:

- The Field Placement Program, which offers academic credit for working with supervising attorneys in government agencies and public-interest organizations both domestically and internationally
- Need-based scholarships for financial aid recipients
- Collaborative projects with other academic departments both on campus and across the UC system
- Faculty research and scholarship
- Clinical program initiatives that enable students to travel and deliver onsite legal services to clients in need
- Technology enhancements throughout the law school

Planned Giving

A planned gift to Boalt Hall helps satisfy personal financial-planning needs and provides the law school with important long-term support. Such gifts constitute a philanthropic legacy that is part of a larger estate-planning process in which the donor decides how certain assets are distributed.

Some planned gifts provide income for life or a fixed term of years. Others provide an immediate income tax charitable deduction or avoidance of capital gains tax. A gift made through a will generates significant estate tax benefits, and helps Boalt serve its faculty, students, staff, and alumni.

A few planned giving options:

- **Bequests** are provisions in your will or living trust that direct a portion of your estate. A bequest to Boalt qualifies your estate for a charitable deduction that can reduce estate tax liability. Bequests can provide a specific monetary amount, property, or percentage of your estate. Residual and contingent bequests provide first for your family, and then, circumstances permitting, for Boalt.



As Chair of the Boalt Hall Fund and one of its long-term supporters, **EVAN COX '87** doesn't mince words about private philanthropy. "If we want to keep pace with the nation's best law schools and maintain access for qualified students from all walks of life, alumni giving participation rates have to increase," he says. "State funding continues to decline, which means it's up to us to help offset that gap."

Also president of the Boalt Hall Alumni Association, Cox wants the school to continue to expand its programs and impact in an economic environment "where others think of cutting back and lowering goals." The Covington & Burling partner says that requires both financial support and active engagement: "Alumni involvement enriches our community in countless ways. Boalt students should find lasting value from their connection to the school and the wider alumni network, not just while attending but for the rest of their careers."

- **Charitable Gift Annuities** are contracts between an individual and a charitable organization such as Boalt Hall. In exchange for a gift of cash or property to Boalt, you or the person of your choice will receive an annuity that pays a fixed sum for life. Annuity payments can begin immediately or at a later date.
- **Charitable Remainder Trusts (CRTs)** allow you to transfer money or property to the UC Berkeley Foundation, which makes payments to you or your beneficiaries for a lifetime or for any period of time. When these payments end, the trust assets pass to Boalt to be used as you specified. CRTs offer federal income and estate tax deductions for gifts benefitting charities and educational entities. If appreciated assets are used to fund a CRT, the donor avoids capital gains tax.

- **Pooled Income Funds** work like mutual funds. Gifts from a group of Boalt alumni and friends are managed and invested jointly and all income earned by the fund is paid out quarterly in proportionate shares to its participants. Four funds with varied investment objectives are available.
- **Real Estate** gifts entitle the donor to an income tax deduction for the property's full appraised fair market value. Almost any marketable real estate is suitable for a charitable gift, including personal residences, commercial buildings, and forest land. Unencumbered property is preferable and generates the greatest tax benefit.
- **Retirement Assets** often exceed expectations—and increase tax burdens. Taxes, which sometimes exceed 70 percent, can erode assets when left to heirs outright. Making a charitable gift of retirement assets reduces this tax burden.

Those who include Boalt Hall in their estate plans through bequests, pooled income funds, gift annuities, charitable remainder trusts, gifts of life insurance, or gifts of property become members of UC Berkeley's Benjamin Ide Wheeler Society. Member benefits include exclusive invitations to the summer Wheeler Society Tea hosted by the Chancellor, as well as to other campus athletic and cultural events.

If you have any questions about making a planned gift to Boalt, please contact the Alumni Center at 510.643.8170 or email giftplanning@law.berkeley.edu.

Gifts of Cash

Cash gifts may be made by personal check, credit card, and/or a pre-authorized monthly transfer of funds. Donors can also make a pledge, for up to five years, and fulfill their gift over time. Checks should be made payable to Boalt Hall and mailed to:

UC Berkeley School of Law
Boalt Hall Alumni Center
2850 Telegraph Ave., Suite 500
Berkeley, CA 94705-7220

Credit card gifts can be charged to Visa, MasterCard, or American Express at give.law.berkeley.edu. Pledges can also be made online or by calling the Alumni Center at 510.642.2590. To arrange monthly, quarterly, or yearly gifts through an electronic funds transfer between your bank or credit card company and the UC Berkeley Foundation, fill out an authorization form available at www.law.berkeley.edu/files/EFT_authorization_form.pdf and mail it to the address listed above.

Gifts of Securities

Gifts of securities are recorded based on the stock market's mean market value on the date of the gift, which is determined by the date the donor relinquishes control of the stock. Securities can be transferred directly from your brokerage account to the university's account. To donate such gifts, please call toll-free 855.729.1099 or email givesecurities@berkeley.edu.



SAM COLE '63 has a proven knack for turning cost-benefit analyses into savvy decisions. So when the former real estate dealer was deciding how best to support Boalt Hall, he went straight for the win-win option. "Charitable gift annuities benefit everyone," he says. "Giving stock to Boalt greatly reduced the tax burden I would've paid if I sold it, and provided a fixed annual payment for life. For me, it comes out to about a 15 percent return."

Raised near the Appalachian Trail, Cole has long admired the law school's commitment to policy-driven environmental work. "My mom wanted me to be a forest ranger," he says. "Having seen all that's happened to our land over the years, supporting institutions that pursue environmental solutions is important to me."

Matching Gifts

Matching gifts—offered by companies, law firms, and other organizations—multiply the size of a donor's contribution to Boalt. Some employers also match gifts made by retirees or spouses. Donors receive full credit for gifts, plus any resulting corporate match for the purpose of recognition and benefits. For receipt and tax reasons, the gift's matched portion must be documented in the corporation's record.

For information or matching gift forms from your employer, contact your human resources office and send a completed form by mail to the address listed above. If you have questions, contact Catie Cariaga at ccariaga@law.berkeley.edu or 510.643.6542.

DONOR RECOGNITION: 2011-2012

THE BENEFACTORS CIRCLE

Boalt Hall's most prestigious donor society recognizes all who have demonstrated a longstanding commitment to the school by making lifetime cumulative gifts or pledges totaling \$500,000 or more. Benefactors Circle and Dean's Society members receive complimentary tickets to various special dinners and events throughout the school year, plus recognition in the *Annual Report of Philanthropy*.

\$5,000,000 and above

Elizabeth J. Cabraser '78 ♦

\$2,500,000 - \$4,999,999

Anonymous

Robert D. Burch '53 *

The Rosalinde and Arthur Gilbert Foundation ♦

Estate of John B. Hall

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C. William '41 * & Rosalie F. Maxeiner

Pamela Samuelson & Robert Glushko ♦

S. K. Yee Foundation ♦

\$1,000,000 - \$2,499,999

Anonymous

California Endowment

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\$500,000 - \$999,999

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Estate of John B. Hall

Pres '56 & Maurine Hotchkis

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Nokia ♦

Open Society Institute ♦

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Counselor

\$50,000 - \$99,999

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\$25,000 - \$49,999

Anonymous (2)

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Arthur K. Lund '61

Manatt Phelps & Phillips

Frank Martin '04 & Rosa Terrazas ♦

James McManis '67 & Sara Wigh ♦

The Honorable G. William Miller '52 * & Ariadna Miller ♦

DONOR RECOGNITION: 2011-2012

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 Wilson Sonsini Goodrich & Rosati
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 Michael W. Hall '82 ♦

Haynes and Boone ♦
 Jon L. Heberling '70
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Each year, Boalt Hall's festive Citation Award Dinner brings our community together to honor an exceptional graduate, faculty member, and young alum. Benefactors Circle and Dean's Society members receive a special invitation.

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ALDO GUIDOTTI '44 couldn't believe his eyes during a recent tour of Boalt Hall's reconfigured law library inside the South Addition. A student worker in the library seven decades ago, he remembers it as a "crackerbox" with barely enough room to move around. "To see it now is just amazing," he says. "I can't imagine how they were able to build underground and end up with something so impressive."

A longtime supporter of Boalt's Law School Library Fund, Guidotti —now 92—still works three days a week at Guidotti and Lee in Orinda. He mainly handles estate planning and probate matters, sometimes for third-generation clients. "When you lose interest, you lose everything," Guidotti says. "You have to keep active in this world, and I enjoy staying involved and helping people."

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BRUCE S. ROSS '71 created the Carol Ross Scholarship Fund to offset the tuition and fees of a single parent with financial need and exceptional academic capacity. "It's not easy to combine education with parenting and supporting your family," says Ross, the national chair of Holland & Knight's Private Wealth Services Dispute Resolution Group. "I'm happy to help at least one Boalt student meet that challenge."

Ross also plans to invite Boalt students to participate in Holland & Knight's nationwide Mickey Rooney Elder Abuse Pro Bono Project, a firm effort to assist indigent elderly clients threatened by or engulfed in financial abuse. "This project will give law students clinical experience," he says, "and help an underserved elderly population that is only growing larger and more susceptible as it ages to fraud and undue influence."

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As someone who has pretty much done it all—retired Starbucks General Counsel, political advisor, former Army officer and law firm partner, standout musician—**PAULA BOGGS '84** values Boalt's unrelenting push to expand student opportunities: "I give at the level I do because of Dean Edley's leadership and all he's done to raise the school's profile and broaden its reach."

Calling her Boalt experience "a very important ingredient of the person I became," Boggs sees rising tuition making it harder for others to have that same experience—"especially with the State of California supporting its public institutions much less than it used to. That's why it's really important for those who can support Boalt through private philanthropy to do just that."

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LOIS BRADY '86 knew she'd get a top-flight education at Boalt Hall. What she didn't expect was the level of collegiality and flexibility from the school's administration. "We received a lot of individualized attention," Brady recalls. "I had an infant when I went to law school, and got lots of help scheduling my classes to fit within my babysitter's schedule. It was fantastic."

Brady, who worked at McCutcheon, Doyle, Brown & Enersen in San Francisco and at Wendell Rosen in Oakland, has operated her own bankruptcy trustee practice for 17 years. "I believe in supporting the institutions that educated me and enabled me to have a wonderful career," Brady says. "I had a great experience at Boalt, and I'm happy to help the school continue to thrive."

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To accomplished entertainment lawyer **DARREN TRATTNER '94**, serving on the Boalt Hall Alumni Association Board of Directors means conveying the school's narrative—effectively—in as many circles as possible. "Not many people have a real sense of our financial situation," he said. "As the state pulls back funding, Boalt must increasingly rely on contributions from the private sector. We have to get the word out and explain why that support is needed."

The law school has ramped up programming in Trattner's field, and recently launched the *Berkeley Journal of Entertainment and Sports Law*. As for his own success, Trattner sees a clear catalyst: "I wouldn't be where I am today without Boalt. For me, it's an easy decision to give what I can every year."

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Boalt Dean Christopher Edley, Jr. (right) poses a question during September's sold-out Political Roundtable in San Francisco. Edley moderated the event, part of Boalt's Centennial celebration, which featured former California Governor Pete Wilson '62 (left), political strategist Dan Schnur (center), former Michigan Governor Jennifer Granholm, and former U.S. Secretary of Labor Robert Reich.

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