

Office of Gift Planning  
University of California, Berkeley  
1995 University Avenue, Suite 401  
Berkeley, CA 94704

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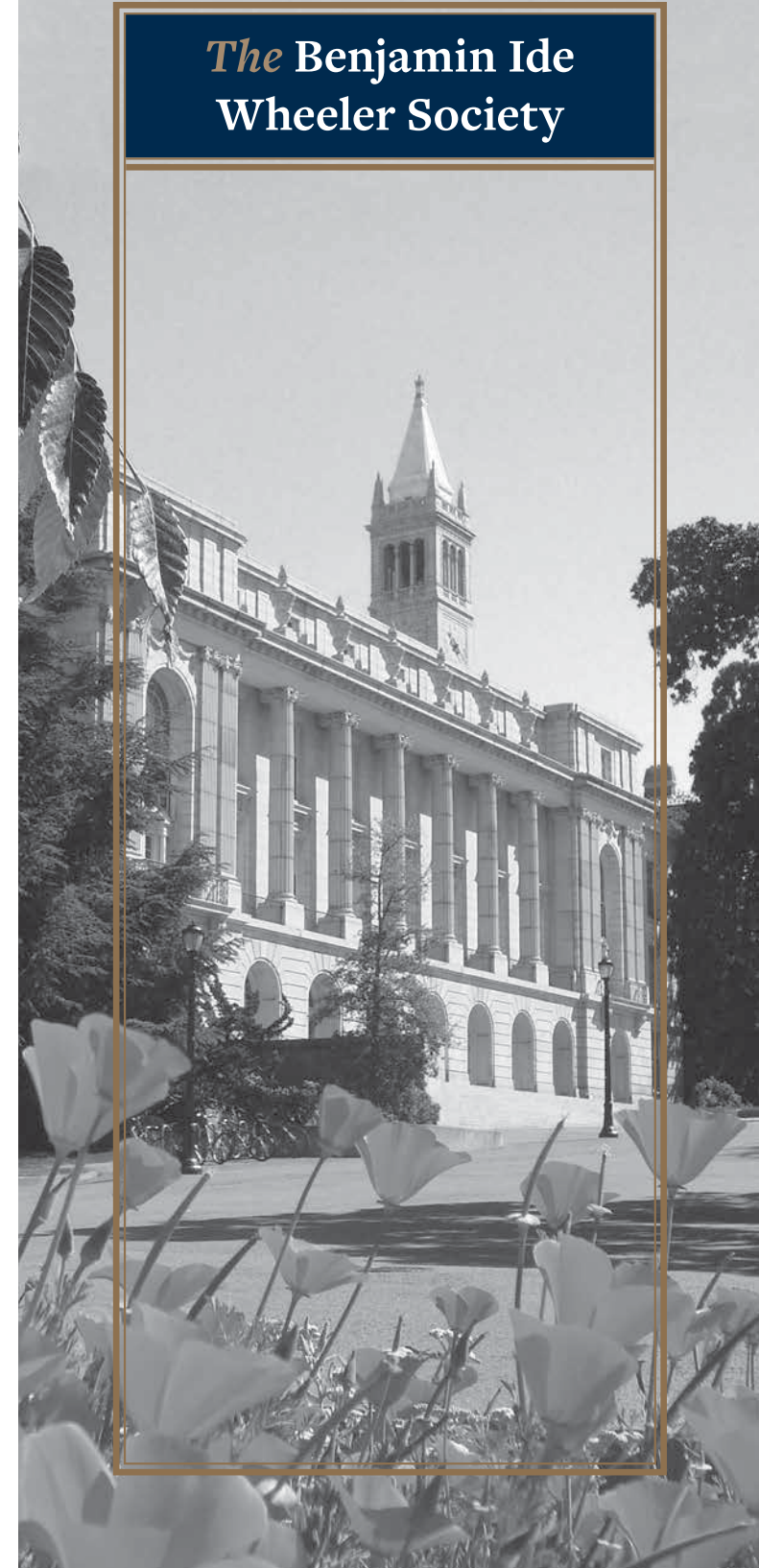
## For more information

510-642-6300

800-200-0575

[ogp@berkeley.edu](mailto:ogp@berkeley.edu)

[planyourlegacy.berkeley.edu](http://planyourlegacy.berkeley.edu)



## *The* Benjamin Ide Wheeler Society



## A strong tradition of charitable support

Planned giving donors provide essential philanthropic support that enables Berkeley to remain one of the world's great universities. The Benjamin Ide Wheeler Society was established in 1987 to recognize and thank these visionary individuals.

Giving options include gifts in wills or living trusts or life income plans such as gift annuities or charitable remainder trusts. They may also include beneficiary designations of retirement plans, brokerage accounts, and life insurance policies. Some outright techniques such as gifts of real estate also make donors eligible for membership in The Wheeler Society. These giving vehicles offer Berkeley supporters creative and flexible strategies to pursue charitable and financial goals while supporting the campus work most important to them.

## Recognizing a devoted leader

The Wheeler Society is named for Benjamin Ide Wheeler, president of the university from 1899 to 1919. President Wheeler transformed Berkeley from a small western public university to one of the most distinguished centers of learning in the nation. 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 built the Campanile.

## Becoming a member

If you are interested in learning how a planned gift can help establish your legacy at Berkeley, please contact our office. Our team of experts will be happy to speak with you. If you have already provided for the university in a planned gift but have not yet informed us, please complete and return the attached response card. The university appreciates receiving information from members of the Wheeler

Society regarding the specific purpose of any planned gift. This allows the university to review your gift language to ensure that your philanthropic intention can be implemented by the campus.

Soon after joining, you will receive The Wheeler Society welcome package, which includes a Wheeler pin to wear to events, a booklet about Benjamin Ide Wheeler, and a special certificate and letter signed by the Chancellor.

You will also receive exclusive member benefits. These include invitations to the spring luncheon in Southern California and the summer luncheon on campus, the Wheeler hospitality lounge during Homecoming, and complimentary admissions to campus cultural venues such as BAMPFA, The Botanical Gardens, The Lawrence Hall of Science, and The Hearst Anthropology Museum. You may also receive ticket discounts to athletic events and Cal Performances.\*

\*All benefits are subject to annual review.

## Thank you

We are very grateful to members of The Wheeler Society for carrying on a vital tradition of support. Please do not hesitate to contact the Office of Gift Planning about joining The Wheeler Society or to learn more about charitable gift planning.



## The Benjamin Ide Wheeler Society

I/We would like information on:

- Wills/Living Trust Gifts
- Life Income Gifts
- I/We have included UC Berkeley in my/our estate plan through a:
  - Will/Living Trust
  - 401(k)/403(b)/IRA/etc.
  - Brokerage Account
  - Life Insurance Policy
  - Charitable Trust (privately managed)
  - Real Estate

I/We choose to have our name(s) listed in The Benjamin Ide Wheeler Society honor roll as follows:

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I/We choose not to have our name(s) listed in the honor roll.

Name(s)

Address

Phone

E-mail

The best time to reach me/us:

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