

TECHNIQUES

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Legacy Society
Appreciation
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CLASS OF
'72

Caltech



Gerry (PhD '66) and Sally Schwartz

A Distinguished Alumnus Gives Back

Out of appreciation for an education that prepared him for a notable career, Gerry Schwartz (PhD '66) has created a charitable remainder unitrust to support Caltech.

When Schwartz joined the engineering firm Sverdrup in 1966, he was something of a novelty.

“I was the first environmental engineer they’d ever heard of,” he says.

With his Caltech preparation, Schwartz began a career overseeing large-scale public works projects that would earn him the Institute’s Distinguished Alumni Award. He recently chose to contribute to his alma mater out of gratitude.

INTERDISCIPLINARY EDUCATION

As a student, Schwartz embraced the challenge of late nights in the lab and balanced that workload with athletic pursuits such as competing on the varsity soccer team. He remains impressed by how Caltech faculty members, many of whom were leaders in their respective fields, were so accessible. The mentorship of his adviser, environmental scientist/engineer Jim Morgan, was particularly meaningful. And Schwartz fondly remembers the camaraderie of his classmates, some of whom went on to become prominent professors in their own right.

To Schwartz, Caltech is “an extraordinary collection of brainpower in a small community that makes it possible, and indeed necessary, for students and faculty to work across disciplines.” While he studied environmental engineering, he also was exposed to fluid dynamics, earthquake engineering, advanced

mathematics, and physical and organic chemistry and biochemistry.

His years at Caltech were memorable for personal reasons, as well. Schwartz and his wife, Sally, had their two sons while he was at the Institute. Sally’s partnership and support, then and now, have helped drive his success.

A LEADER IN HIS FIELD

Largely through Schwartz’s efforts, Sverdrup built a thriving business in environmental engineering during his nearly 40-year tenure with the company. Ultimately, he became president and, later, chair of the subsidiary Sverdrup/Jacobs Civil. He led major water-related programs in San Diego, Jacksonville, and Detroit, among many other communities. Schwartz notes that the credit for these successful programs really goes to the many engineers and support staff who always sought new and better ways to design and build the facilities.

“Engineering is a team sport,” he says. “Maybe that’s why I liked athletics. I like team sports.”

A leader in his field, Schwartz was elected to membership in the National Academy of Engineering in 1997. During his term as president of what is now the Water Environment Federation, he founded the organization’s research arm. He later served as president of the American Society of Civil

Engineers, where he advocated for raising the field's educational standards.

Now retired, Schwartz remains active in environmental engineering through his involvement in efforts to determine how society can adapt to climate change. He currently serves on a National Academy of Sciences advisory committee to the U.S. government.

CALTECH'S ENDURING INFLUENCE

In recognition of what Caltech has meant to his career and his life, Schwartz has established a charitable remainder unitrust to fund investigations in civil and environmental engineering.

"I like the charitable remainder trust," says Schwartz, who also supports the Institute as a member of the Caltech Associates. "It allows me to ensure that, on my and my wife's passing, I will provide for an organization I cherish, while giving us income during our lifetime."

Helping to perpetuate research and education at Caltech makes perfect sense to him, because he believes the Institute helped set him up for success.

"Caltech taught me how to think, how to question," he says. "The things I learned, how to attack problems, have helped me all my life. This is a way to say, 'Thank you—and keep doing it for the next generation, and the next.'"

Torchbearers

HONOR ROLL

In recent months, the following people have joined Caltech's Torchbearers Legacy Society.

Irwin (MS '63, PhD '67) and Lana Alber

William Bridges and Linda McManus

Celia Cable

Gary Clinard (BS '65, MS '66)

Chip Fairchild

Jim (BS '67) and Jenelle Fishbein

Lynn Heronen

Donald Lieberman (BS '77) and Pat Long

Allan Markowitz

Kevin Monahan (BS '70)

Thomas Neenan and Robin Guyett-Neenan

Park Nobel (MS '63)

Craig Sarazin (BS '72) and Mirtill Magyar

Richard Small (BS '56) and Elizabeth Hewitt

Donald (BS '71, MS '72) and Andree Smith

Caroline Woodruff

ESTATE GIFTS

From the estate of **Edward Bennett** (PhD '49), Caltech received more than \$20,000 in unrestricted support.

From the estate of **David Lincoln** (BS '46, MS '47), Caltech received \$100,000 in unrestricted support.

From the estate of **Shoshana Riesenfeld**, Caltech received \$50,000 for the Einstein Papers Project and \$50,000 for the Palomar Observatory.



*Joseph (BS '41) and
Anne Lewis*

A Legacy of Devotion to Service and Caltech

The late Joseph Walters Lewis Jr. (BS '41) used to recall ambling down Caltech's Olive Walk as a child, hand-in-hand with his father. His dad told him, "This is where you're going to school, and you're going to be an engineer." And so it was to be.

The younger Lewis studied mechanical engineering at the Institute, where his student leadership foreshadowed his future commitment to serving his community. Decades later, he and his wife, Anne, gave to Caltech through a charitable remainder unitrust.

"Dad just loved Caltech, and Mom supported him in everything," says Katharine Lewis, the couple's daughter. "They wanted to leave the world in better shape than when they entered it."

Joe Lewis's years at Caltech were marked by avid involvement in athletics and student government, including playing tennis and serving as senior class president. Early in his career, he began working closely with another Caltech alumnus, Arnold Beckman (PhD '28), inventor of the pH meter. Lewis

managed two of Beckman's companies, and he later ran his own electronics business for 35 years. At various times, Lewis was president of the Caltech Alumni Association, president of the San Marino school board, and vice-mayor of San Marino.

Joe and Anne Lewis were a study in contrasts: He was the straight arrow, methodical and staid, while she was colorful and unorthodox. But they shared an abiding love and a deep dedication to public service. In just one example, the San Marino Rotary Club honored the Lewises in 1995 for four decades of "service above self."

Their influence even extends beyond Earth: Joe Lewis's company made parts that went to the moon with the Apollo 11 Lunar Module in 1969, and an astronomer friend

The Choice Is Yours with a Charitable Remainder Trust

There are many variables to factor in when creating a planned gift. Fortunately, the charitable remainder trust is a particularly versatile way to give, enabling you to support the students and faculty of Caltech while also lowering your tax burden and securing regular income for you or a loved one.

There are two types:

- **Charitable remainder annuity trusts** distribute a fixed amount of income every year.
- **Charitable remainder unitrusts** provide distributions that are recalculated each year based on the investment's performance.

With either option, you can choose to be the sole income beneficiary, or you can direct

payments to a family member, a friend, or anyone else you choose.

Trusts enable you to take a partial charitable deduction on your income taxes. Additionally, because they are tax-exempt, trusts can reduce capital gains tax on a variety of assets, including

- real estate,
- stocks and other securities, and
- business interests.

Because of its flexibility, the charitable remainder trust is a powerful tool for making gifts that benefit Caltech—and you, too.

To learn more about how you can give to Caltech with a charitable remainder trust, call (626) 395-2927 or email giftplanning@caltech.edu.

named an asteroid she discovered “(4796) Lewis” in the couple’s honor.

When the Lewises entered a retirement community in 1995, they made a gift of their San Marino home to Caltech through a charitable remainder unitrust. The gift ensured that they would have payments for life and also reduced their tax burden.

“They were able to lower their estate taxes while supporting Caltech,” Katharine says. “I think they jumped at the chance.”

As members of the Caltech Associates, the Lewises enjoyed travel in their later years, including trips to Hawaii, New Zealand, and Australia. Joe died in 2013, and Anne in early 2019. Their legacy—whether floating around the cosmos or supporting Caltech people—continues on.



MEET

Rick Robertson

Rick Robertson joined Caltech as a senior gift planning officer in 2018, after a national search. He

brings with him nearly two decades of experience in development and gift planning, with previous stints at Baylor (his alma mater), Georgetown, and George Washington universities as well as Cedars-Sinai Medical Center.

He says: “I welcome the opportunity to help alumni and friends benefit Caltech in creative ways while also creating their own legacy.”

To speak with Rick Robertson about planning your gift, call (626) 395-1758 or email Rick.Robertson@caltech.edu.



Recognize This Alumnus?

This alumnus was a loyal Flem during the Orange Wars, when Fleming and Dabney residents lofted fallen citrus back and forth between the courtyards of their houses. He took karate lessons from master Tsutomu Ohshima, who had founded the oldest American university karate club at Caltech in 1957. On the way to a biology degree cum laude, this alumnus added an unofficial minor in the humanities. In particular, he cites Professor Charles Bures’s teachings in philosophy and psychology as a lasting influence.

After commencement, this alumnus moved east to Massachusetts, where he took a year off from his studies and married his longtime, and formerly long-distance, girlfriend. He went on to earn a doctorate in psychology at Clark University but soon shifted his focus to software engineering.

His career in computing included 15 years at the medical equipment maker Hologic. Much of his work there focused on a scanning machine used to calculate bone density. He recalls converting two core modules of the software from DOS to Windows, “which more or less involved turning the program inside out.” Among many other additions to the software for this machine, he developed code to

generate pictures that showed the distribution of bones, muscle, and fat in different colors. These images were put on display in Times Square.

Since he retired in 2013, this alumnus has been developing an app that is “a form of brain training designed to make people happier.” He is active in his church, and, as of press time, he and his wife have built on a 20-year hobby to become co-presidents of their square-dancing club. They also spend time with their four grandchildren, who live close by.

Torchbearer **George Rappolt** (BS '72) has elected to provide for Caltech in his estate plans. He feels good about linking his legacy to the Institute’s main products—innovative research and extraordinary alumni. He notes, “The world needs more Techers.”



*George Rappolt (BS '72)
and Tabby Rappolt*



Torchbearers Legacy Society Appreciation Luncheon

April 6, 2019

Nearly 100 people attended the 2019 Torchbearers Legacy Society Appreciation Luncheon, which was hosted by President Thomas F. Rosenbaum and Professor Katherine T. Faber at their residence.

Maxwell Robb, Caltech assistant professor of chemistry, offered an inside view of his research on new types of polymers that have special properties, such as changing color in response to stress. Potential applications include helmets that could immediately indicate the severity of impacts to the head.



Luncheon speaker Elizabeth Eiden (second from left), an undergraduate studying geophysics at Caltech, and fellow Caltech women's basketball team members Madeline Schemel and Lauren Suezaki share a smile with Torchbearers. Eiden participates in research at Caltech's Seismological Laboratory with the mentorship of Mark Simons, the John W. and Herberta M. Miles Professor of Geophysics and chief scientist at JPL.



Caltech President Thomas F. Rosenbaum, Sonja and William Davidow Presidential Chair and professor of physics (left), enjoys a conversation with (from left) Gary Clinard (BS '65, MS '66), Gayle Rogers, and Douglas Josephson (BS '65). Clinard recently made a gift to establish an innovation fund in engineering and applied science.



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