

James C. Whitney (BS '64)



'THERE'S NO PLACE BETTER' ALUM'S GIFTS SUPPORT INQUIRY AND OPPORTUNITY

In their junior year of high school, James C. Whitney (BS '64) and his classmates began thinking about where they might go to college. Knowing his interest in science, a friend suggested that Whitney consider Caltech, "a temple of science in the distant west that built the Palomar telescope."



"Of course everyone knew about the Palomar telescope—it was probably the most famous scientific instrument in the world at that time," says Whitney. "I had heard about that, but I had never heard of Caltech."

Although the library at their suburban New York prep school featured a large array of college catalogs, Caltech's was not among them. Whitney placed an inquiry with the librarian who, after consulting the card catalog, climbed a rickety flight of stairs to the dusty archives. He returned a few moments later with a copy of *Time* magazine from three years prior. On its cover was a drawing of Lee DuBridge, then-president of Caltech, and the Hale telescope.

"I would never have been able to go to Caltech without scholarship support ..."

"I sat there and read the whole thing," Whitney continues, "and I said: 'That's it. That's where I'm going. No other story is allowed.'"

More than 50 years later, after earning success as both an engineer and an entrepreneur, Whitney is establishing the James C. Whitney Endowed Undergraduate Scholarship Fund to make sure that other students can tell their own Caltech stories. His inspiration was simple.

"I would never have been able to go to Caltech without scholarship support," he says. "My mother was a widow with three teenagers." Grateful for the four years of generous financial assistance he received, Whitney wants to give back and provide the same kind of support to other students.

While he prepared to offer the scholarship endowment as a 50-year reunion gift, Whitney was also looking to create trusts for both his son, age 50, and daughter, age 40. He considered working with a bank or investment company, but decided that on top of being expensive and complicated, such institutions would not provide the level of attention he sought for his finances.

Whitney consulted with Caltech's Office of Gift Planning, where staff explained the benefits of different gift plans. Ultimately, he chose two charitable remainder unitrusts, one for each of his children.

CALTECH LEGACIES

If you were a Caltech athlete within the last 50 years, he knew your stats. He was at your meets and games, yelling your name from the bleachers or a folding chair.

A fan and friend of thousands of students, Bob Townsend was a groundskeeper for Caltech Athletics from 1964 to 2003, rising to the rank of super lead—a title created in his honor. Often showing up at dawn, he striped and maintained the track, baseball diamond, and fields. Even after retiring, he visited the campus every few days.



Bob Townsend

"He was always saying he'd do something special for Caltech—he talked about it for years," says Vince Riley, Townsend's close friend and successor as super lead. "This was like his family, his home."

But no one expected the remarkable gift that came to Caltech on Townsend's passing in 2013.

"I literally just got this angel," says athletics director Betsy Mitchell, who had been trying to locate funds to cover two important expenses when she learned that Townsend had named Caltech the beneficiary of two annuities.

Mitchell's plan to build a climbing wall for students had stalled because she needed a match for a grant. Additionally, the baseball field was overdue for laser leveling, rebuilding of the mound, and installation of new sod. Now, thanks to Townsend, the climbing wall is complete and the field renewal is under way.

Caltech athletes will no longer hear his cheers, but Townsend is still their champion.

ALL IN THE FAMILY, AND THE FAMILY'S ALL IN



Kay and Boyd Levet

For Boyd Levet, a fifth-generation Southern Californian, supporting Caltech is a family affair.

His father, Melvin "Mel" Levet (BS '39, MS '40)—the family's sole Caltech alumnus—studied geology, in part to learn how to find oil. (At the time, the railroad companies that brought the family west were becoming oil companies.)

Mel Levet found more than he anticipated at Caltech. His studies did prepare him for an oil-industry career, culminating in three decades as a research geologist with Standard Oil of California (now Chevron). But his student years also left a lasting imprint.

"Caltech was an extraordinarily meaningful part of his life when he was there, and it has been ever since," says Boyd Levet. "The spirit of Caltech, when it comes to scientific research and discovery, has lived in Dad all of his life. And it's infectious! It's contagious."

"We think it has kept him young," says Kay Levet, Boyd's wife. "He has a mind that constantly is asking 'why.' He has a scientist's inquiring mind."

"For someone who's 97, it's amazing," she continues. "He can talk until you are done about rocks and where they've come from and how they were created. It's been that many years since he was at Caltech, and he's still sharing that knowledge with his family."

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THERE'S NO BETTER PLACE

"It just makes sense," says Whitney. "I was thinking about making a sizable gift to Caltech. At the same time, I wanted to provide for my children; create mini-retirement plans for them once they turned 60 and generate a little income along the way."

"Caltech is on the same side of the table as I am. Being the eventual recipient of the funds, Caltech cares about growing the principal. I have great confidence they are going to do it right."

Choosing to link his legacy to Caltech was easy.

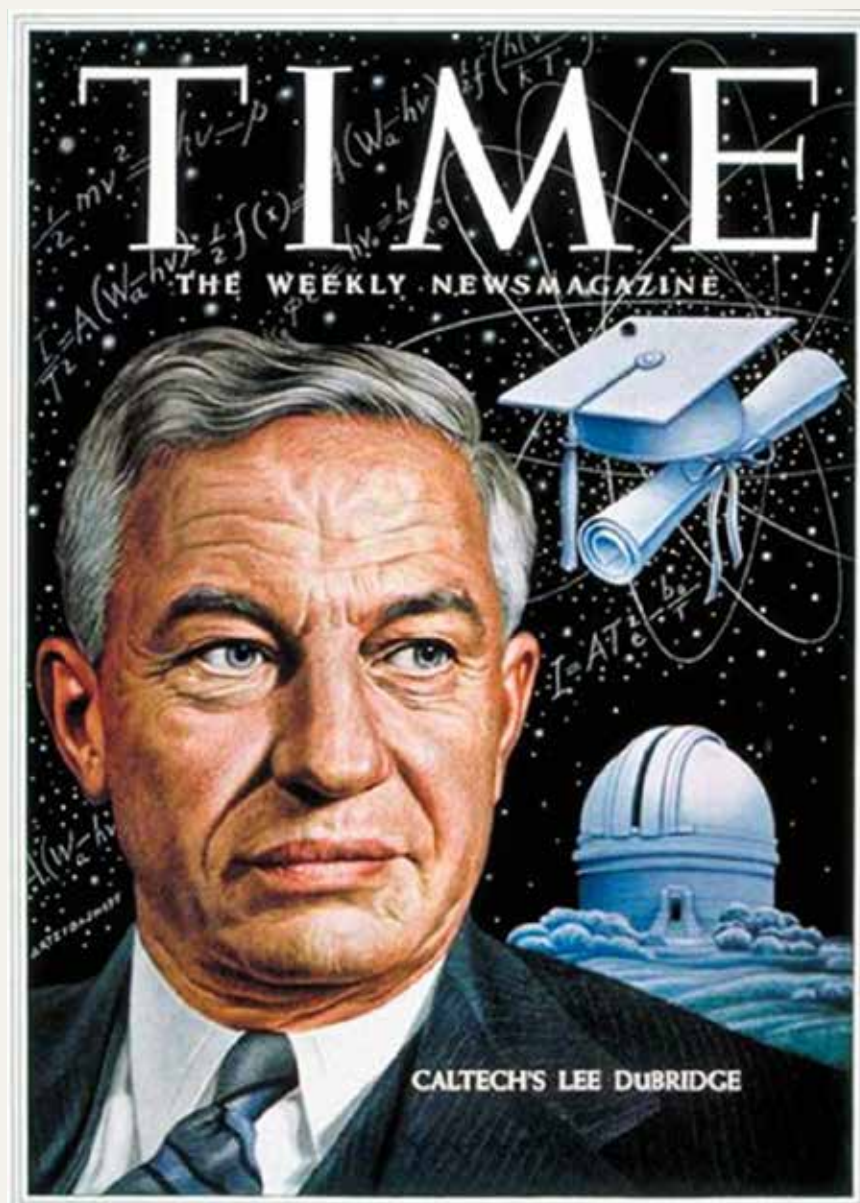
"It's the pride you get from having been there and knowing that there's no place better—you carry that for the rest of your life," Whitney says. "The fact is that Caltech is small, elite, and there are no second-rate people there. None."

The *Time* article that introduced Whitney to Caltech still resonates with him today. Its title, "The Purists," refers to the Institute's unfettered commitment to furthering inquiry for its own sake. The essay examined some of the trailblazing work made possible by this approach.

"That magazine article was written almost 60 years ago," Whitney points out, "and as far as I can see, Caltech hasn't changed."

Whitney's trusts will provide Caltech with flexible, reliable funding, which will help ensure that the Institute continues to foster pioneering research. And his scholarship endowment will help students for years to come.

"I'm really going to try to build the scholarship fund up over the coming years and make other bequests," Whitney says. He adds with a laugh, "Because they will add up to something, even after I've departed this world and gone to the great classroom in the sky."



Time, May 16, 1955

RECOGNIZE THIS ALUMNUS?



An indelible moment in his career found him at the table of engineers charged with making sure the Apollo 13 astronauts returned home safely. (They did; there's a movie about it.) He gives credit to Caltech for setting him on his path in aerospace.

"At Caltech, they gave me the fundamentals," he says. "It opened the doors for me everywhere. Everywhere."

His technical bent manifested early, when he worked as a machinist while taking a double course load at North Hollywood High. Later, his facility with machines served him well in the Navy, where he was a radar technician during World War II. GI Bill funding made it possible for him to finish his degree.

At Caltech, "the Guffer" was known for his gift of gab and good humor. An athlete, he practiced with the basketball team and earned a letter in football playing single-wing guard and halfback.

The lessons he learned from his professors—in particular Francis Maxstadt and Theodore von Kármán—stuck with him. Although he was a reluctant student when it came to chemistry, Linus Pauling's lectures gave him an appreciation for the subject. Likewise, he traces his lifelong love of history to a course taught by Wallace Sterling.

In 1950, he took "this redheaded girl" on their third date, to a Caltech football game and a poorly attended dance at Dabney Hall. That same night he and the then-Nancy Shepperd

decided they were meant to be together. And together they stayed until her death 40 years later.

He began working at Hughes Aircraft before graduation, and stayed on until 1956. A standout memory there was his part in a historic first—equipping an airplane with a digital computer that served as its autopilot unit. After a few years with the RAND Corp., he joined Garrett AiResearch (now known as Honeywell), where he worked from 1961 until 1985.

Today, he and Dorothy, his longtime friend and wife of 19 years, enjoy world travel. They delight in their collective nine children, 18 grandchildren, and three great-grandchildren. They also treasure their connection to Caltech and have chosen to support the Institute through a charitable remainder unitrust.

Says William Rumer (BS '49, MS '50):
"When you see something that's worthy, you've got to support it. It's a unique school. The people there care, they really do. I know they'll spend the money well."



CREATE A GIFT THAT BENEFITS CALTECH, YOUR LOVED ONES, AND YOURSELF

When you establish a charitable remainder unitrust with Caltech, you ensure a meaningful long-term benefit to the Institute while also providing income for your lifetime and/or the lifetimes of others.

This plan allows you to transfer unique assets to fund your gift. You receive a charitable income tax deduction, and, as an added benefit, you earn capital gains tax savings on gifts of appreciated assets.

Features of this gift plan include:

- The unitrust pays out a fixed percentage—minimum 5 percent—of the unitrust assets' net fair market value, as revalued annually.
- You claim an immediate income tax deduction for the present value of Caltech's remainder interest in the unitrust.
- You may fund a unitrust with a gift of cash, securities, real estate, or other assets.
- You can make additions to the trust in future years, thereby increasing your annual income while also receiving additional tax deductions.
- The unitrust is irrevocable and cannot be changed.

At the end of the trust term, the remaining funds support Caltech in general or the specific program you may have designated. Your planned gift helps ensure that Caltech continues to foster world-changing science and engineering—today and into the future.



Torchbearer

In recent months, 21 new members have joined the Torchbearers of Caltech.

HONOR ROLL:

Trudy L. Bergen (BS '74)

Elizabeth S. Bowles

Dale and Suzanne Burger (BS '53)

Hugh Dubb (BS '56)

Thomas and Doris Everhart

Dundas Flaherty and Sandra Kulli

Laurel W. Furumoto

K. Reed Gleason (BS '67)

Steven W. Hashimoto (MS '80)

Donald B. Hicks (BS '46)

Douglas Wade Hill (BS '64)

Peter and Gladys Howell (BS '50)

Kent and Joyce Kresa

Carter (Warner) Leedy (BS '07)

Boyd and Kay Levet

Deedee Rechten

David C. Rosenblum (BS '76)

Warren and Katharine Schlinger (BS '44)

John and Gwen Taber (BS '46)

James C. Whitney (BS '64)

Anders Yang

ESTATE GIFTS

The generosity and foresight of alumni and friends are crucial to Caltech's success. Below are just a few of the many individuals who have supported Caltech through estate gifts.

Frank Dore (BS '45) named the Institute as a beneficiary of his family trust, which distributed a gift of \$30,000 that will support the Center for Teaching, Learning, and Outreach, as well as the Hixon Writing Center.

Helen Keeley provided for Caltech through an unrestricted bequest of \$100,000.

From the estate of Elise Marvin, Caltech has received an unrestricted bequest of more than \$2 million to date.

ALL IN THE FAMILY

Mel Levett's spirit of inquiry was indeed infectious. He kindled a passion for astronomy in his young son by bringing him to Caltech's Palomar Observatory and taking the family on camping trips to the Sierra. Today, Boyd Levett takes out his own telescopes to lead sidewalk astronomy classes in his family's new home in Sisters, Oregon, where the night skies are almost white with stars.

When Boyd and Kay Levett recently received an inheritance, they immediately saw a special opportunity and called the Office of Gift Planning at Caltech.

Kay Levett, who had been a planned giving officer for more than two decades, knew they could establish a trust that would benefit both family and Caltech.

"Caltech looks out for the donor's needs as much as the university's needs, and that is extremely important," she says. "It really goes hand in hand."

The Levetts' trust will benefit two family members before the remainder is used to build up the Melvin N. and Perle I. Levett Family Endowment for Geological and Planetary Sciences.

"We love Caltech, Mel loves Caltech, and we want to show our enthusiasm for the endowment he set up," says Kay Levett. "The whole family is very happy about it."

Her husband agrees: "This extends Dad's own legacy of involvement with, and support of, Caltech beyond his lifetime and certainly beyond our own, so it's a very logical thing. It's a family thing. Caltech is a part of the family."

NEWS FROM YOUR GIFT PLANNING TEAM

The Office of Gift Planning is pleased to announce that our new website has launched. Please visit <http://plannedgiving.caltech.edu>.

We hope that you find our new site easy to navigate and the tools useful. We would love to hear your opinions on our new website and the new design of *Techniques*.

Give us a call or send us an e-mail with your thoughts.

CONTACT US

Techniques is published by Caltech's Office of Gift Planning. For more information about the stories featured in this issue or if you have questions about deferred gifts, please contact the Office of Gift Planning:

Allyson Simpson
Director

Phone
(626) 395-2927

Jim Ehlers
Deputy Director and Senior Gift Planning Officer

E-mail
giftplanning@caltech.edu

Oliver Mueller
Senior Gift Planning Officer

Web
plannedgiving.caltech.edu

Natalie Piega
Manager, Trusts and Bequests

Caltech

Office of Gift Planning
Mail Code 5-32
Pasadena, CA 91125



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RECOGNIZE THIS ALUMNUS?

This alumnus had the nickname of "the Guffer." He played basketball and football. He received an electrical engineering degree and worked at Hughes Aircraft.

See inside for more.

CLASS OF
'49



TECHNIQUES

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