

TECHNIQUES

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Evelyn & Alan (BS '72) Breakstone

As a student at Caltech, Alan learned about a lot of things—elementary particle physics, experimental high-energy physics, and, on Senior Ditch Day, the physics of a brute-force stack: “As part of our stack, we poured concrete and made my dorm room impenetrable,” he remembers. “But the underclassmen found their way in, and unfortunately my room was practically unlivable for weeks after that.”

His Caltech experience also prepared Alan for further studies in physics and a career in academia, software engineering, and management. Sweetest of all, however, his Caltech connections led him to his wife, Evelyn. One of his undergraduate professors played a key role in hiring Alan as a postdoc, during which time he worked at CERN (European Organization for Nuclear Research) in Geneva. There he attended a Fourth of July party hosted by Evelyn, who was in Switzerland to open the new world headquarters of accounting firm Arthur Andersen.

“I owe a lot to Caltech,” Alan says. “It made a huge impression on me when I was young—and it has affected all aspects of my life in a positive way.”

Over the years, Alan and Evelyn have continued to carry forward the lessons learned at Caltech.

Avid travelers who are especially interested in educational trips, the Breakstones have explored volcanoes and the W. M. Keck Observatory in Hawaii, visited the giant tortoises of the Galapagos Islands, and hiked in the Canadian Rockies—all made possible through their membership in the Caltech Associates. (Alan sits on the board of the Associates' Northern California chapter.) And whenever Institute professors venture to Northern California to share their research with alumni and friends, chances are Alan and Evelyn will be in attendance.

“I'm very impressed by the work that's going on at Caltech and with the speakers who come to tell us about what they're doing,” Evelyn says. “The research is extremely valuable, and the people are down to earth and really quite wonderful.”

AN APPETITE FOR LEARNING—AND GIVING BACK

“What you learn at Caltech is how to learn,” says Alan Breakstone (BS '72). “It's not what you know but what you're capable of learning and doing—quickly, efficiently, and while making as few mistakes as possible.”



CALTECH LEGACIES

Mechanical engineer Mark Bohn (MS '73, PhD '76) just kept studying after he graduated from Caltech. He went on to publish a textbook on heat transfer and articles on a host of topics ranging from liquid fuel production to optics to solar thermal energy.

Ultimately, he applied his expertise to cofound and serve as vice president of Rentech, a company that transforms natural resources into products such as fuels and fertilizers.

Upon his retirement in 2005, Bohn immersed himself in some of his favorite outdoor activities—hiking, skiing, and cycling—amid the majestic Colorado Rockies.

Even as he enjoyed retirement, though, Bohn planned one more major step to advance his chosen field. He decided to establish a professorship at Caltech. Before his passing, he worked with his attorney and Caltech's gift planning staff to create an endowment funded by his retirement accounts and other assets.

Now, the Mose and Lillian S. Bohn Endowed Professorship in Engineering and Applied Science—named to honor Mark Bohn's parents—will support distinguished faculty members at Caltech far into the future. Thanks to his foresight, engineering research and teaching will flourish at Caltech under the Bohn name for generations to come.

HERE'S TO GOOD HEALTH



Linda & Thomas (BS '60) Tebben

Within minutes of joining a table of young Flems for a Reunion Weekend dinner, Thomas “Tom” Tebben (BS '60) and his wife, Linda, were commiserating and laughing with the undergraduates about life as a Caltech student. “I think,” jokes Tom, “that those young men and women were glad to talk with us and were probably thinking, ‘Hey, this guy made it through Caltech, and he looks OK now!’”

HOW TO AVOID BEQUEST BLOOPERS AND BENEFICIARY BLUNDERS

Small wording errors can lead to big problems when it comes to your will and beneficiary designations. The good news is that you can easily avoid these mistakes.

Staff members in Caltech's Office of Gift Planning are a phone call or e-mail away and can help you navigate the process.

Working with financial advisers and estate-planning attorneys is an essential first step, but gift planners such as those of us on the Caltech team are generally more up to date on all aspects of charitable giving and attuned to potential pitfalls. We have a complementary expertise, and we work regularly with financial advisers and attorneys to help their clients achieve their goals.

We can offer you recommendations on charitable giving through wills, trusts, and retirement policies, as well as other kinds of gift options. Every discussion is confidential.

Caltech has been managing planned gifts for more than 95 years. If you choose to create a gift to the Institute through your will or beneficiary designations, we can help you make certain that your preferences are expressed clearly, ensuring that Caltech can fulfill your vision for your gift.

The biggest concerns of today's Techers are the same as they were 50 years ago, Tom observes. Namely: Am I going to get through this place? What comes next?

“I didn't think I had a prayer of graduating,” laughs Tom. “But over time, I dared to think that it was somewhat conceivable that I might make it.”

Tom made it. He earned his bachelor's in chemistry and even served as student body vice president along the way. After graduation—thanks in part to encouragement and a strong endorsement from Caltech's then-dean of students, Paul Eaton—he attended the University of Chicago Graduate School of Business (now the University of Chicago Booth School of Business) for his MBA.

Through the long and fruitful career in analytics and consulting that followed, Tom found himself approaching life's challenges with the scientific, analytical methodologies he had learned as an undergraduate. His appreciation for his time at Caltech and its rigorous coursework remained with him; building on a proud family tradition of supporting the Institute that began with Linda's father, Raymond Peterson (BS '31, PhD '35), Tom and Linda have been members of the Caltech Associates for many years.

Tom says: “My sense of Caltech as being a place that makes things happen only grew over time. Then the thought came to me: ‘If we throw some money in the pot, we can really be a part of that.’”

Thus inspired, the Tebbens established a fund at Caltech to address a concern that touches everyone's life. Tom notes with solemnity and mirth, “When you get four people of my age together, it takes about three minutes to get on the topic of health.”

And health solutions “start with basic research,” Tom explains. “The purpose of the Thomas and Linda Tebben Endowed Research Fund for Human Health is to support the fundamental science that will be useful for that next tier of applied science.”

Caltech's Office of Gift Planning helped ensure that the Tebbens' gift would be designated as flexible funding to support innovative health research across academic divisions. Gift planning officers also made sure that the couple's generous contribution, which included retirement plan assets, would provide optimal tax savings.

Tom and Linda's congenial and candid conversation with present-day students strengthened both their desire to give back and their confidence that their support would make a difference.

“I can't think of very many places where you can make a gift that has the kind of leverage that a gift to Caltech has,” Tom says. “I have ultimate confidence that it's planting seeds that will grow into other meaningful gifts.”

RECOGNIZE THESE ALUMNI?



These alumni attended Caltech as transfer students in the early 1970s. Raised on the East Coast by a single mom of modest means, he was able to enroll at the Institute thanks to generous financial aid. She attended high school in Virginia and became one of the trailblazing young women who broke the gender barrier as the Institute's first female undergraduates.

He studied mathematics. She pursued physics.

They became fast friends who loved to talk about their studies but also had a mischievous streak—they even sneaked into Baxter Hall while it was under construction. They avoided trouble thanks to a lenient security guard who literally looked the other way as they escaped. He also introduced her to his childhood friend Norm Berube, who became her life partner.

After graduation they continued to stay in touch while earning graduate degrees at different institutions. Eventually, they both landed jobs in Northern California, some 35 miles apart.

A voracious reader who loved learning languages, he worked as an applied mathematician but yearned to devote more time to math, writing, and reading. After making his last mortgage payment, he quickly switched to part-time employment.

She worked as a telecommunications engineer and stayed actively involved with her alma mater, becoming a member of the Caltech Associates and serving as president of the Alumni Association. Now, she volunteers for the American Red Cross, helping people when the unthinkable enters their lives, be it a natural disaster or a house fire.

Over time, their friendship evolved into something different. They were not just friends but family—a family of their choosing, without the labels of siblings or cousins. They spent holidays together, just as family members would, and traveled with Berube to Pasadena for Seminar Day.

When he was diagnosed with cancer and given months to live, the boy from Boston reached out once again to his Caltech friend. He asked her to serve as executrix of his estate. Naturally, she said yes.

It was then that she discovered just how much Caltech meant to her friend. He donated his most cherished belongings—more than 6,000 books—to the library. He also bequeathed his house to the Institute.

"There were three times when he smiled and looked happy," she said, referring to the period after his diagnosis. "The first time was after I had talked to Caltech and the library and they agreed to take his books. His face lit up. It was a pretty special moment."

More than 40 years after they first met at Caltech, Richard "Rip" Pelletier said goodbye to his friend and de facto sister Stephanie Charles, knowing his wishes had been fulfilled.



Norm Berube & Stephanie Charles (BS '73)



Torchbearer

In recent months, several new members have joined the Torchbearers of Caltech. Five members wish to remain anonymous.

HONOR ROLL:

*Glenn S. Orton (PhD '75) and
Linda R. Brown*

Arthur E. Bryson (MS '49)

Philomena Chun

Alfred F. Gort (MS '62)

Herbert Jubin (BS '68)

Hugh Kendrick (MS '62)

Daniel King (BS '49)

Janet Lindholm

*William E. (MS '71, PhD '76) and
Joan Jordan Moore*

Garnett (BS '60) and Janet Pessel

Richard Rosenberg

Ralph G. Schinnerer (BS '58)

Geneviève Ségol

Richard Teague (MS '65, PhD '68)

Samuel B. Trotter (BS '60)

Liming W. and John F. Williams (BS '69)

*Cavour (BS '57, MS '58, PhD '62) and
Evelyn Yeh*

Louise G. Young (PhD '63)

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.

Peter Kafitz (BS '42) provided for Caltech through an unrestricted bequest of more than \$550,000.

From the estate of Henry Jex (MS '53), Caltech has received \$100,000 to support undergraduate scholarships.

Ruth Stasneck named the Institute as a beneficiary of her family trust, which distributed over \$1,900,000 and established the endowed Edward R. and Ruth N. Stasneck Scholarship Fund.

AN APPETITE FOR LEARNING

Alan's active involvement as an alumnus began in the 1980s, when he joined a small group that was instrumental in reinvigorating the Bay Area chapter of the Caltech Alumni Association. He served as the association's president for three years and also volunteered for the Caltech Fund.

The Breakstones have been Torchbearers since 1992. For years, they planned someday to make a deferred gift to augment their bequest intention, but when they received unexpected news in 2014, "someday" became "right now." When a U.S. company in which they owned stock merged with a foreign company, and inverted in the process, investors such as the Breakstones would have incurred significant tax liability.

"We decided it was the right time for us to make a planned gift," Evelyn says. The Breakstones worked closely with staff members in the Office of Gift Planning to establish a charitable remainder unitrust as a way to make a gift while mitigating negative tax consequences.

"This is a great vehicle for those with highly appreciated stock," Alan says, "because both the donor and Caltech benefit."

Evelyn adds: "We see our investment as best used by people who have societal goals in mind and who are looking toward the future for the betterment of mankind. Caltech has exceptional students, professors, and administrators, and the Institute really stands behind those people to help them accomplish their goals."

With their generous commitment, the Breakstones are empowering those exceptional minds to continue learning—and doing.

NEWS FROM YOUR GIFT PLANNING TEAM

The Office of Gift Planning is pleased to announce that **Michael Conover** has recently joined our team as Assistant Manager of Trusts and Bequests. Mike comes to the Office of Gift Planning with a 13-year tenure in Caltech's development records and gift administration department. Over the years, Mike has amassed a great deal of experience and expertise working with the administration of planned and deferred gifts. In his new role, Mike will work with Natalie Piega to oversee and manage Caltech's life income gift portfolio as well as to administer matured bequests and open estates.

Congratulations and welcome, Mike!

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RECOGNIZE THESE ALUMNI?

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See inside for more.

CLASS OF
'71 & '73

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