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**INSIGHTS & OPTIONS**

**LATEST UCLA PROJECTS AND ACHIEVEMENTS**

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What a Will Can Do

Through your will, you can accomplish much more than the distribution of your property. You also can:

- Provide for property management after your lifetime.
- Reduce the need for complex accounting and reports.
- Recommend guardians of minor children.
- Include a bequest to UCLA and others and create a meaningful legacy that fulfills your philanthropic goals, while preserving financial security.
- Choose to endow a scholarship in your name or to honor a loved one, support specific research efforts, an educational, art, or health care program, or endow a chair in a field that is meaningful to you.

Summer is prime time for long-range planning

Summer is upon us and for many, this means a chance to relax a bit and think through long-term plans and goals. Fall 2012 will bring a busy election season, and a number of federal tax law changes are scheduled to occur in the coming year. Now is a good time to think through and update your estate and financial plans. You may want to consider the following actions this summer and early fall:

- Note any changes in the value of your assets and the income they produce.
- Define your goals for the management and future distribution of those assets.
- Review the needs of loved ones and consider any changes that may be needed in your plans.

Reflect changes

Your will, living trust, or other estate planning documents should be reviewed periodically and updated to reflect changes in your life: births, deaths, changes in marital status, financial gains and losses, a move to another state, or changes in your personal goals which may have occurred since your plans were last revised.

Routine reviews of your long-range estate and financial plans are the best way to make certain your arrangements for the future disposition of your property are up to date and meet your current needs and goals. Let us know if we can provide more information to you or your advisors as you consider the philanthropic component of your plans.

Looking to the future

Thanks to legislation enacted by Congress in recent years, many Americans now find they can give more to loved ones, free of estate and gift taxes. As a result, it may actually be possible to increase the amount devoted to charitable purposes through your will or other long-range plans without reducing gifts to loved ones.

Many alumni and other friends choose to include UCLA in their will or estate plans, thus ensuring our ability to provide life-changing education and research in the future.

Charitable gift annuities: give and receive

- Create a reliable source of additional income for life.
- Provide financial assistance to a parent, sibling, child, or other loved one.
- Reduce, delay, or eliminate gift, estate, capital gains, and/or income taxes.
- Reduce the expense and delays of estate settlement.

You can do all these things by establishing a charitable gift annuity. For more information, call us at 1-800-737-8252 or visit www.legacy.ucla.edu

Preserving music that bridges time and space

I met Walter at a party,” Yvonne Jurmann remembers fondly. “He was playing the piano, and I went up to him and said, ‘You’re playing all the music I like!’” The charming and elegant man Yvonne met that day, whom she later wed, was Walter Jurmann, the composer behind many famous songs of the turbulent 20s and 30s in Europe and in the U.S. Like many artists, Walter Jurmann left Germany in the 1930s, first making his way to Paris and then to Hollywood, with a long-term contract from MGM.

There, he made his mark composing for a variety of pictures: From exotic European-style comedies featuring, among others, the sentimental You’re All I Need (written for the film Escapade) to the zaniness of the Marx Brothers’ film A Night at the Opera (for which he composed the Italianate standard Cosi Cosa) or to dramatic pictures like Mutiny on the Bounty, starring Clark Gable, in which he evoked the tropics with Love Song of Tahiti.

Jurmann died unexpectedly of a heart attack during a trip with his wife to her hometown of Budapest in 1971. “After Walter passed away, I had to start a new life on my own. I went to a UCLA function with a friend of mine and there we met Professor Thomas Harmon and other faculty members who thought Walter was a very important composer and asked me if I could share his papers and compositions so they could be added to the music library. This became the very first collection of American popular music to be established at the Library, and I am particularly happy about this.”

It was with intense dedication to the preservation and sharing of her husband’s music that Yvonne Jurmann decided to provide for a gift through her estate to fund the Walter Jurmann Endowment at UCLA’s Department of Music, fulfilling one of Jurmann’s own mottoes, “a composer lives on through his music.”

The endowment will stipends to faculty and students in honor of Walter Jurmann’s work, introduce his timeless music to new generations of musicians and audiences, and award scholarships and fellowships to vocal students who win the annual Walter Jurmann Award competition. It also will support collaborative activities between UCLA and the Walter Jurmann Societies in Berlin and Vienna.

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Walter Jurmann

“Walter believed that his music would survive on its own merit and hoped that it would ‘always bring joy to people in all walks of life.’ The gift I made to UCLA is to introduce his music to young people. Walter was very interested in talented young people. He liked to encourage them to work hard to become successful and achieve their dreams, and this gift very much matches his spirit.”

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