



United Way  
of Santa Barbara County

# HERITAGE HIGHLIGHT NEWS



## 22nd Annual Heritage Club Appreciation Luncheon



Karen Anne Platt, Rick Nightingale & Karen Knight

The **Santa Barbara Yacht Club** was the setting for United Way's 22nd Annual Heritage Club Appreciation Luncheon. Thirty-five Heritage Club members and guests were honored for leaving their legacy to this community, as they dined overlooking one of the most spectacular views of our harbor on Wednesday, June 6, 2007. Accolades were given to Craig Wilberg and his staff at the Yacht Club for making this a memorable event, and a special thanks to the **Filippini Financial Group** for generously underwriting this luncheon.

A delightful lunch of Medallions of Beef Tenderloins or Atlantic Salmon was served as honorees shared their stories and personal commitments to the ongoing success of United Way of Santa Barbara County. It was a lovely setting in which to meet the newest members of the Heritage Club, and to reminisce with those who have been members for many years.

**Many thanks to our event underwriter, Filippini Financial Group, Inc.**

### Creating innovative solutions for real and lasting change.

The **Heritage Club** was established in 1982 to honor those forward-thinking individuals who have made provisions to leave their legacy to this community as part of their overall estate plan. Through wisely planned gifts, they have extended their United Way support for generations to come. Their gifts come in many forms, including Charitable Remainder Trusts, Gift Annuities, Donor Advised Funds, Pooled Income Funds, Bequests, and gifts of Retirement Accounts or Life Insurance Policies. Heritage Club members are recognized on the Wall of Honor, a perpetual plaque located in the main conference room of the Stuart Taylor Community Center.



Jeanne Brown & Judy Goodbody



Tim Gamble

**United Way's Endowment and Gift Planning Services Program**, under the guidance of a premier group of volunteer estate and financial planning professionals, offers a variety of techniques which are individually tailored to meet the philanthropic desires of our donors. These gifts are invested in at least one of six Endowment Funds, which provide a solid foundation of perpetual support for United Way. These endowments insure the future of United Way of Santa Barbara County's unique and innovative programs which benefit children, families, and seniors in our community.

**To learn more about the Heritage Club, please contact Judy Goodbody, CFRE, RIA, CRTP, Gift Planning Services Officer, at (805) 965-8591 ext.120, or log on to our website at [www.unitedwaysb.org/endowment.html](http://www.unitedwaysb.org/endowment.html)**

## The Powerful Heritage Club Legacy



Judy Goodbody & Diane Doiron

In her opening comments, **Diane Doiron**, Endowment and Gift Planning Services Committee Chair, welcomed United Way's Heritage Club members to the 22nd Annual Appreciation Luncheon. She spoke about her many years of personal commitment to United Way as a volunteer and as a Heritage Club member. Diane introduced Jeanne Brown, one of our newest Heritage Club members, and encouraged others to tell their stories. Those who wished to do so, introduced themselves and told of their United Way involvement and what led them to become Heritage Club members.

A camaraderie exists which bonds these unique and like minded people together, bringing them back to celebrate their membership in the Heritage Club year after year.

### **VISION: In our community, everyone has a hopeful future.**

**Paul Didier**, United Way's President and CEO spoke about the new direction for the organization and how your dollars are being invested in the future of our community. Through the many hours of dedicated efforts on the parts of both United Way staff and volunteers, the Power of Partnership vision is coming to fruition as we continue with the Strategic Planning process.



Marilyn Anticouni & Paul Dider

To reflect the new direction of United Way of Santa Barbara County, Paul read a press release that could be published in the year 2014. This press release describes the remarkable results that will be achieved over the next seven years by children receiving innovative services through United Way's Power of Partnership...services delivered by local community based nonprofits in partnership with educators, business, government leaders, and community volunteers.



Myles Limburg & Penny Rowan

Children in the Power of Partnership program will see a 94% average gain on reading tests, and experience an 81% decrease in school disciplinary actions. When these children reach high school, 45% of the participants are more likely to achieve a "B" average or higher, 39% more likely to exhibit leadership behaviors with peers, 61% more likely to maintain their own good health, 42% less likely to be involved in problem alcohol use, 56% less likely to be involved in violence related actions, and 21% less likely to be involved in early sexual activity.

This extrapolated data comes from an initial partnership with La Cumbre Junior High School, La Colina Junior High School, and Carpinteria Middle School, Orfalea Fund, and United Way of Santa Barbara County, as well as several years of measuring reading and behavior results at United Way's Fun In The Sun Program. Students first become involved in a planned succession of early childhood services that create unprecedented seeds for future greatness, beginning with Success by 6. Paul thanked the Heritage Club members for making the commitment to provide the long-term resources required to make the services involved in the Power of Partnership study available to so many more students in the future.

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320 East Gutierrez Street  
Santa Barbara, CA 93101  
Tel: (805) 965-8591x120  
Fax: (805) 962-3461



For more information call:  
**Judy Goodbody, CFRE, RIA, CRTP,**  
Gift Planning Officer  
Email: [jgoodbody@unitedwaysb.org](mailto:jgoodbody@unitedwaysb.org)

## The Power of Partnership at Work