



24th Annual Heritage Club Appreciation Luncheon



Susan Frazier, CPA, MST &
Jeff Restivo of
MacFarlane Faletti & Co., LLP

Emilio's Ristorante hosted United Way's 24th Annual Heritage Club Appreciation Luncheon on Wednesday, June 10, 2009. Twenty-seven Heritage Club members and their guests were treated to a very intimate luncheon where these legacy supporters of United Way of Santa Barbara County were honored.

A delectable lunch of Slow Roasted Pork, Grilled Salmon or Crunchy Vegetable Roll was served as honorees shared their stories and personal commitments to the ongoing success of United Way's unique programs and the local people they serve. **Chef Pete Clements'** famous Tiramisu completed the festivities. Accolades were given to all the staff at Emilio's for making this a very memorable event. We want to extend a special thanks to the CPA firm of **MacFarlane Faletti & Co., LLP** for generously underwriting this luncheon.

Many thanks to our event underwriter, MacFarlane Faletti & Co., LLP

Improving the lives of Children, Seniors and their Families

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 which is a perpetual plaque located in the main conference room of the Stuart Taylor Community Center.



Paul Didier & Tim Gamble



Marilyn Anticouni &
Michael Bergquist

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 of Santa Barbara County's unique and innovative programs which are improving the lives for children, families, and seniors in our community.

To learn more about the Heritage Club, please contact Judy Goodbody, CFRE, IAR, CRTP Gift Planning Services Officer, at (805) 965-8591 ext.120, or log on to our website at www.unitedwaysb.org/giftplanning

The Powerful Heritage Club Legacy



Diane Doiron, Ursula Henderson
& Karen Knight

In her opening comments, **Diane Doiron**, Endowment and Gift Planning Services Committee Chair, welcomed United Way's Heritage Club members to the 24th annual gathering. She spoke of her personal commitment to United Way as a volunteer and as a Heritage Club member. Diane announced the recipient of the 2009 Legacy Supporter Award, **Earl Damitz** who founded United Way's Endowment program. Heritage Club members celebrated with **Frank Kelly**, a Heritage Club member since 1989, as he turned 95.

Producing Meaningful Results In Our Community

Paul Didier, United Way's President and CEO spoke about the education focus area where United Way is involved in a number of partnerships.

Home Play Learning Kits are games created in both English and Spanish for children to take home to play with their parents or siblings as part of the learning criteria for their pre-school or early grade levels.

Pre-Kindergarten Institutes condenses a year's worth of pre-school into the four weeks before the start of kindergarten, teaching children their primary colors, letters, and social behaviors. Last year, there was a 40% improvement in the 198 participating children.

Character Counts program recognizes and rewards children for their academic and social behavior relating to the six pillars; Citizenship, Caring, Fairness, Responsibility, Respect, Trustworthiness. This United Way partnership has been successfully implemented in elementary and junior high schools from Carpinteria to Goleta.



Karen Knight, Frank Kelly
& Judy Goodbody



Judy Goodbody & Eric Boehm

Jeopardy Games were developed by two retired engineers from our community who believe that when children are having fun, they learn better and faster. Dos Pueblos High students in the ROP program are taught electronic and precision soldering assembly skills to build these learning machines for elementary and junior high school students in the Santa Barbara School District. One third of the young people in the ROP program are accepted to four-year colleges in engineering programs.

Youth Educator + Parent Pages (YEP) is an on-line directory of all agencies and services available to parents, teachers and caregivers of children from kindergarten to 12th grade.

Volunteer Income Tax Assistance (VITA) is a partnership with Santa Barbara High School and others to train students to prepare tax returns for low income families.

Fun in the Sun will deliver education enrichment to 364 low income children this summer at four sites from Goleta to Carpinteria.

Power of Partnership Initiative came to a consensus with the input of nearly 5,400 community members participating in over 70 different community forums and meetings. The question was, "What do we as a community want to provide for our children, our seniors and their families during the next 10 years?"

~ **Seniors stay independent and live safely in their homes as long as possible.**

~ **Children enter Kindergarten ready to learn and succeed.**

Carpinteria Unified School District has embraced the opportunity to partner with United Way and 14 other organizations to develop best practices for children in our community to produce results that reach these lofty goals. To learn more about United Way's unique partnerships please go to www.unitedwaysb.org

HERITAGE HIGHLIGHT NEWS

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of Santa Barbara County



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The Power of Partnership at Work