

## Painting the Town Red!

On Saturday, October 13, 2007 two hundred and fifty patrons arrived in their finest red and black formal attire for United Way's 11th Annual Red Feather Ball. Actually,



Red Feather Ball Co-Chairs Bob & Val Montgomery

they pulled up to the 'Red Feather Club' where the ballrooms of Fess Parker's Doubletree were transformed into a glamorous 1930's dance club complete with music and dancers from the era. The band, Stew and the Crew were a great hit as guests danced through-out the dinner when not being entertained by the professional dance troupe that performed Tap, Charleston and the Lindy Hop.

Master of Ceremonies, **Debby Davison** started the evening with the announcement that United Way's Board of Directors unanimously voted **Katherine Abercrombie, "Honorary Chair in Perpetuity"**. Unfortunately, Katherine was taken with a cold and not able to attend at the last moment. But, we owe a debt of gratitude to Katherine for a decade of support to this event.

The 2007 recipients of the Abercrombie Award for Community Excellence, **Bob & Chris Emmons** and the firm of **Damitz, Brooks, Nightingale, Turner & Morrisset** were honored for decades of community service and philanthropic contributions in speech by Board Chair, **Tom Thomas** and song as the **Musical Mischief Production** of "That's Philanthropic! The Sequel" brought the audience to their feet.



The Emmons, our 2007 Honorees; Chris watching Bob accept their Abercrombie Award

Red Feather Ball Co-Chairs, **Bob and Val Montgomery** were so instrumental in the success of that event. They held a pre-event VIP Reception for present and past recipients at their Montecito home on September 25th. This event was attended by over 60 people including our Alexis de Tocqueville Society members and Red Feather Ball Sponsors. They contributed their Napa Valley



Rick Nightingale having a good time accepting the 2007 Abercrombie Award on behalf of Damitz, Brooks, Nightingale, Turner & Morrisset while presenter Tom Thomas look on.

Vineyard home for a live auction item and they were among our most generous sponsors and supporters. Thank you, Bob & Val!


Thanks to the generosity

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## Red Feather Ball, cont.

of time, talent and treasure of our Honorees, Chairs and Women's Committee and Patrons the Red Feather Ball continues to surprise and delight as one of Santa Barbara's most enjoyable and successful non-profit parties of the calendar. Always held on the second Saturday of October please Save the Date for October 11, 2008. 

### *Sponsors for 2007 Red Feather Ball include:*

Bob and Chris Emmons  
Perri Harcourt  
Bob and Val Montgomery  
Lady Leslie Ridley-Tree  
Harold and Annette Simmons  
Montecito Bank & Trust  
The Mosher Foundation  
Santa Barbara Bank & Trust  
James and Mary Beth Volgelzang  
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Turner & Morrisset  
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Ca'Dario  
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Four Seasons Biltmore  
Fresco at the Beach  
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Glamour House Intimate Apparel  
Glen Annie Golf Club  
Harbor View Inn  
Hotel Santa Barbara  
In Bloom  
James Paul Brown  
Jaqua  
Kawasaki of Santa Barbara  
Karen Knight  
Las Vegas Embassy Suites  
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John & Susan Lee  
Robert Light  
Magellan's  
Ryan Martin  
Marymount School  
Metropolitan Theater Corporation  
Montecito Country Club  
Neuvie  
Ojai Valley Inn & Spa



Red Feather Ball sponsor Lady Leslie Ridley Tree, flanked by good United Way friends Andy Chou & Janet Garufis

Paveloff Vision Center  
Fess Parker  
Quantum  
Robert John Russo Gallery  
Salon Mango  
Sal's Pizza  
San Ysidro Ranch  
Santa Barbara Ballet Center  
Santa Barbara Chamber Orchestra  
Santa Barbara Sailing Center  
Santa Barbara YMCA  
Santa Barbara Yoga Center  
Santa Barbara Zoological Gardens  
Santa Barbara City College  
Sea Landing  
Segway of Santa Barbara  
Sharon Bolton Scents  
Simpatico Pilates  
Simpson House Inn  
Stephanie Baker Child Photography  
Sunstone Vineyards & Winery  
Suzanne's Cuisine  
Sylvester Vineyards & Winery  
Tetsu & Kathy Tanimoto  
Tecolote Book Shop  
The Asheville Renaissance Hotel  
The Brewhouse  
The Brown Pelican  
The Ensemble Theatre Company  
The Stationary Collection  
The Upham Hotel and Country House  
The University Club  
The Waterfall Resort  
John & Laurie Tilson  
Ty Warner Sea Center  
Venoco  
Vina Robles  
Jim & Marcia Wolfe  
Zelo Restaurant  
Zodo's Bowling & Beyond

# Day of Caring 2007

On Saturday, September 15, 2007 **United Way of Santa Barbara County** kicked off its Community Campaign to raise pledges to support a local network of health, human, and community building services at the 16th Annual **Day of Caring**. Volunteers helped local non-profit agencies with "hands-on" work assignments from 9 a.m. to 1 p.m.

A breakfast, which was generously donated by **Albertson's**, kicked off the annual event, which was held at the Ben Page Youth Center in Goleta. Volunteers proceeded from the breakfast to community service assignments such as landscape work and plantings, painting, habitat restoration, office work and more in Carpinteria, Santa Barbara, Goleta, and Santa Ynez. Over 1,200 volunteers participated, including young people from local schools, families, church, and community service groups.

Other major sponsors for Day of Caring included **Cox Communications** and **Santa Barbara Bank & Trust**. 



Volunteer working hard at Day of Caring beautifying Dos Pueblos High School



Group of volunteers from Wells Fargo Bank, SBCC, SB City Schools at Santa Barbara Trust for Historical Preservation



The Prichard Family volunteering at Friendship Adult Day Care Center

## Sponsors for 2007 Day of Caring

### Kickoff Sponsors:

Albertson's  
Cox Business Services  
Santa Barbara Bank & Trust

### Cornerstone Sponsors:

Ben Page Youth Center  
CKE Restaurants  
Pacific Coast Business Times  
Wells Fargo Bank

### Pillar Sponsors:

Clear Channel Radio  
Cottage Health System  
Home Improvement Center  
L3 MariPro Communications  
Lockheed Martin  
Pacific Scientific  
Raytheon Company  
Santa Barbara Daily Sound  
Santa Barbara Independent  
sbparent.com

### Building Block Sponsors:

A.G. Edwards and Sons, Inc.  
Alternative Copy Shop  
Community West Bank  
Goleta Coffee Company  
Investec Management Corporation  
La Arcada Investment Corporation  
Santa Barbara News-Press  
The Towbes Group, Inc.

## Day of Caring Volunteers & Teams

A.G. Edwards and Sons, Inc.  
AAA Auto Club  
ABC-CLIO  
AGIA Insurance Services  
AmeriCorps  
Amy Chong  
Bank of America  
Bednarczyk Family  
Business First National Bank  
Call Wave  
City of Santa Barbara  
CKE Restaurants  
Community West Bank  
Cooper Family  
Cottage Health System  
County of Santa Barbara



Scott Missman of Rotary Club of Goleta painting walls at Casa Serena

Cox Business Services  
Damitz, Brooks, Nightingale,  
Turner and Morrisset  
Elaine Rymills  
eMentis  
Fess Parker's DoubleTree Resort  
Gail Bunting  
GE Fanuc  
Gerry Palacio  
Gloria Torres  
Goleta Lions  
Grayeberg Family  
Hanrahan Family  
Helen Wong  
Investec Management Corporation  
Iris Li

Jacquemoud Family  
Jeld-Wen  
Kate Foerner  
Karl Storz Imaging  
Kids in Philanthropy  
Lawyers Title Co  
Light and Life Goleta  
Lockheed Martin  
Los Prietos Boys Camp  
MacFarlane, Faletti and  
Company  
Marino Family  
McGowan Guntermann  
Marika Davidek  
McKoy Family  
McCoy-Lawson Family  
Medtronic  
Melissa Burke  
Melanie Williams  
Montecito Bank and Trust  
Mrs. Brown's Boys and Girls  
Munroe Family  
Nancy Evans  
Noreen Lyons  
Nordstrom  
Northern Trust  
Nostrand Family  
O'Shea Family



Ann & Brian Sarvis, volunteer chair for United Way's Community Campaign and Superintendent of Schools for Santa Barbara City Schools



Group of volunteers beautifying Dos Pueblos High School

Pacific Scientific  
Platinum Insurance Marketing  
Raytheon  
Real Santa Barbara Soccer Club  
Robby Sinick  
Robert Gronendyke  
Rotary Club of Goleta  
Santa Barbara Bank and Trust  
Santa Barbara City College  
Santa Barbara Church of Christ  
Santa Barbara County Air  
Pollution Control District  
Santa Barbara Peace Corps  
Association  
Santa Barbara Regional Health  
Authority  
Sarvis Family  
Signe Drury  
Steven Garcia  
Steve Gerston  
The Church of Jesus Christ of  
Latter-Day Saints  
Tracy Family  
Tricia Mautone  
The Bay Crew  
The Towbes Group  
UCSB  
Wells Fargo  
Westmont College  
Wolfe and Associates  
Women Making a Difference  
Yardi Systems  
Yengle Family

## CHARACTER COUNTS

October is CHARACTER COUNTS!™ month and the students at La Cumbre Junior High School celebrated in style! Principal Jo Ann Caines and lead teacher Laura Baker championed an essay contest for 7th and 8th graders by asking them to write about their personal connection to the Six Pillars of Character™ – Trustworthiness, Respect, Responsibility, Fairness, Caring, and Citizenship.

Students were also given the opportunity to write about their experience with assets such as personal motivation. A total of 450 essays were submitted and from these essays 6 winners were chosen – 3 from 7th grade and 3 from 8th grade. At a special assembly on October 26th, the names of the winners were announced.

Each of these students read their wonderful essays aloud to an auditorium filled with very proud fellow students, parents, and special guests. United Way presented each of the winners with a special plaque to commemorate

their accomplishments. Essay contest winners also received gift certificates and refurbished laptop computers from their school. All students attending the assembly were treated to an outstanding video produced by students in the La Cumbre Junior High School television and video production summer class entitled “The Quest for the Missing Pillars.”

Congratulations to all La Cumbre Junior High School students who participated in the essay contest, with special congratulations to each of the winners! You are helping to build a positive future for everyone in your community! ☆☆☆



Character Counts Essay winners after receiving their awards



Two girls participating in the Born Learning program

## BORN LEARNING

Imagine if every child had five years of education before kindergarten. That is what United Way and its partners are promoting with Born Learning. We know what happens in a child’s early years matters – for success in life and for school readiness. Yet, many parents and caregivers do not know exactly what actions to take to prepare young children for school, or feel like they do not have time to do what is needed. The reality is that children are learning constantly, right from birth. What they learn during those first five years depends on the experiences they have each and every day. This is our greatest challenge and our greatest opportunity.

Born Learning is built on three cornerstones: awareness, education, and action. It is necessary for parents and caregivers to realize the opportunities available each day to teach their children valuable lessons, without having to change their routine. Born Learning takes early learning research and translates it into activities and educational tools for parents and caregivers.

The educational materials for Born Learning are user-friendly and designed to help parents and caregivers understand how to prepare their children for school. They have been reviewed by experts with the American Academy of Pediatrics. To access these materials in English and Spanish, please visit our website at [www.unitedwaysb.org/bornlearning](http://www.unitedwaysb.org/bornlearning) or [www.bornlearning.org](http://www.bornlearning.org). ☆☆☆



## Fun in the Sun 2007 SUCCESS STORY


Edwin\* is an eleven year old Hispanic boy that is heading into sixth grade. Edwin lives with his parents and an older sister. Although it seems that Edwin has a wonderful and supportive family life, he was exceedingly aloof with everyone at the Fun in the Sun (FITS) program. When he was asked to participate in activities his answer was always the same: "no thank you." Edwin has a severe weight problem. Edwin's mindset was that if he did not participate in any of the activities then he would not fail and be made fun of by the other students. We soon discovered that he was being made fun of by two other children.



Fun in the Sun participant enjoying a book

The family advocate and Director of FITS Carpinteria brought the two boys that were giving Edwin a hard time and had an extensive meeting with all three boys. Edwin was given the opportunity to explain to the other two boys how deeply their negative words were affecting him. His convincing words brought tears to their eyes. At the end of the meeting, the two boys gave their word that things would change.

Before they had Edwin go back to class the Director explained why it was important for Edwin to become more actively involved with other children and activities. Edwin seemed even more eager than ever to participate in the program. We called in the parents and explained what had transpired. They were delighted and relieved. From that day on, Edwin not only participated in most athletic activities, but Edwin also initiated many classroom activities for himself and his classmates.

This experience prompted the family advocate and the Director to teach all of the parents the importance of proper nutrition. They put together an invitation for an evening gathering with a nutritional doctor, an event that would allow all families to come learn and ask questions concerning nutrition. Edwin's family was very pleased to see the vast attendance. At the end of the program, many parents made it clear that they wanted to be kept informed of any future discussions. 

\*Name has been changed to protect confidentiality.

**CHECK US OUT  
ONLINE!**  
[www.unitedwaysb.org](http://www.unitedwaysb.org)

In an effort to cut down the cost of postage, you can now receive newsletters, invitations, and special announcements online, as well as RSVP and prepay. If you would like to be added to our e-mail list, please send your name, address, and e-mail address to: [bblessing@unitedwaysb.org](mailto:bblessing@unitedwaysb.org).



### 2007-2008 BOARD OF DIRECTORS

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Services Officer,  
United Way of Santa  
Barbara County

## Tax & Estate Planning: Three Things That May Surprise You

**First**, have you checked your financial worth lately? Chances are you'll be pleasantly surprised. Retirement funds have grown; real estate values have increased; investments have multiplied; insurance policies have expanded; things of value have accumulated over the years.

**Second**, if you find yourself above the \$2,000,000 level, another surprise may await you – the high estate taxes due after you die.

*For example*, if you have assets worth \$2.5 million, it is possible your estate will have to pay taxes of nearly \$156,000. If part of your estate includes a qualified retirement fund and the named beneficiary is someone other than your spouse, that recipient will have to pay the IRS the deferred income tax on that entire retirement account. And, yes, this is in addition to the estate tax.

For estates in excess of \$4,000,000, the estate tax rate is 45 percent, and the generation skipping tax is another 45 percent. Consequently, it's not unusual for a person with a larger estate to discover, sadly, that more than half of his or her hard-earned money will eventually wind up in the hands of Uncle Sam – even though the person had previously paid income tax on much of this wealth.

Now here's the **third** surprise: a little planning can make an enormous difference. For example, you can redirect money that is headed for Uncle Sam by earmarking it to a charity of your choice. Did you know that estate gifts to qualified charities are 100 percent deductible?

Gift and estate planning are well worth the investment of your time – even if your estate is modest and taxes are not an issue. Planning allows you to make the decisions about your estate, not the government.

We strongly urge you to locate a good estate planning attorney and make an appointment soon. Do it now while you are healthy and mentally sharp. You'll not only be amazed at the benefits of

prudent planning, you'll be surprised at how good you feel taking care of this crucial area of your life.

**IMPORTANT NOTE:** The IRA Charitable Rollover is set to end on December 31, 2007. Last year congress opened a window of opportunity for generous individuals to direct an amount straight from an IRA to a charity. Because an individual never actually "takes" the money out of the account, the amount directed to a charity from the IRA is excluded from the individual's income for federal tax purposes. There are some limits – the donor must be at least 70½ for starters – but also great advantages to be gained, all while supporting the unique programs that United Way of Santa Barbara County brings to the people of this community.

For more information about estate and tax planning, please contact us for a free Taxpayer's Home Companion for 2007. Feel free to call our gift planning services officer Judy Goodbody, CFRE and Certified Tax Specialist at 965-8591 ext.120 or email [jgoodbody@unitedwaysb.org](mailto:jgoodbody@unitedwaysb.org). She can confidentially assist you with gift planning options available to you.

 Clip & Mail

**Dear Judy**  
(Gift Planning Officer at United Way of Santa Barbara County):

Please send me free literature about Gift Planning: (check all applicable)

- Gift Annuities    Charitable Remainder Trusts    Gifts of your IRA  
 Gifts of Stock    Gifts of Real Estate    Other \_\_\_\_\_  
 Please contact me about a personal visit or other assistance.  
 I have already included United Way of Santa Barbara County in my estate plan. Please tell me how to qualify as a member of the Heritage Club.

Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

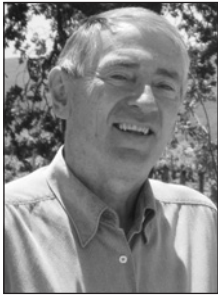
Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

E-mail: \_\_\_\_\_

Mail this form in the enclosed return envelope, attention Judy Goodbody, CFRE, IAR, CRTP, Gift Planning Services Officer, or mail to: United Way of Santa Barbara County, 320 E. Gutierrez Street, Santa Barbara, CA 93101-1736, or fax to 962-3461.

## SPECIAL PEOPLE



Jim Wolfe

**Occupation:** I am currently retired from a career in marketing and sales. My most recent position was President & CEO of the Balance Bar Company.

**Involvement:** I have been involved with United Way for 9 years. I have been on the Board for 7 years and have chaired the Leadership Committee for 5 years. Recently I became co-chair of the newly-formed Alexis de Tocqueville Committee with my wife, Marcia. The reason I became involved with United Way initially is because of the excellent job UW does in identifying the needs of the community and how they partner with other organizations to solve those needs.

**Other Involvement in Santa Barbara:** I am a former board

member of Girl Scouts and the Nuclear Age Peace Foundation. Currently, I'm on the board of Hillside House. I also chair the Advisory Committee for Fighting Back Mentor Program. My business volunteer activities include SCORE (Service of Retired Executives) locally and the IESC (International Executive Service Corps) overseas.

**Personal Information:** I grew up in Buffalo, New York, the sixth of nine children. My wife, Marcia, and I have four married children and seven grandchildren. We moved to Santa Barbara 24 years ago. My hobbies include: tennis, hiking, travel, Broadway musicals, and opera.

**Thoughts on United Way:** Involvement in UW is a great way of giving time, talent and treasure in order to make a difference in our great community. We have confidence that our gifts will be used effectively.



## Dates to Remember

### ANNUAL AWARDS

May 13th  
6:00 - 10:00 p.m.  
Four Seasons Biltmore  
Loggia Room

Please call 965-8591  
for more information  
or to RSVP for events.  
You may also RSVP  
on our website -  
[www.unitedwaysb.org](http://www.unitedwaysb.org)

### Want to Donate your Vehicle?

If you are in the Santa Barbara area and would like to donate your vehicle, please call 805-988-8899 (nationally call 800-531-6560), and ask that the proceeds benefit United Way of Santa Barbara County.



Please remember United Way of Santa Barbara County in your will or estate plans and tell us when you do.

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of Santa Barbara County



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