

33rd ANNUAL HERITAGE CLUB LUNCHEON

Earl Damitz, Paul Didier and Sally Walker were each honored at the 2018 Heritage Club Luncheon for their unique contributions to establishing our planned giving program in the early 80s, when few people or charities knew anything about planned giving.

In the late 1970s, Board Member, Earl Damitz proposed the establishment of a planned giving program. A seasoned participant in almost every phase of United Way's organization, Earl's enthusiasm, interest and dedication were clear. Earl was also an expert on the tax economics of charitable giving as well as long range financial planning. Earl became the founding planned giving/endowment committee chair. Our current planned giving program is the direct result of volunteer extraordinaire, Earl Damitz.



Earl & Merrilyn Damitz

Paul Didier served as President and CEO of United Way of Santa Barbara County (UWSBC) from 1974 to 2016. In his early years at the helm, Paul challenged the Board of Directors to see a future for United Way with stronger financial stability as well as fundraising beyond the annual campaign. Earl and Paul spent years reinforcing that the way to financial stability was to start a planned giving program with a financial planning approach to charitable giving. By 1982, the board was ready to move to the next step - hiring a staff member dedicated to planned giving.



Planned Giving Committee Chair, Diane Doiron and Paul Didier



In 1982, Sally Walker became our first Director of Endowment & Planned Giving. Sally was part-time, but she was busy! Her first three years were full of firsts for UWSBC: our first pooled income fund gift, our first endowment drive, our first life insurance planned gift, our first charitable remainder annuity trust commitment, our first charitable gift annuity and our first IRA beneficiary designation!

Planned Giving Committee Chair, Diane Doiron and Sally Walker

Earl Damitz, Paul Didier and Sally Walker, we thank you each for your unique contributions to establishing our planned giving program.

Visit the Heritage Club page on our website unitedwaysbgift.org/HeritageClub for event photos and more.



Kayne Anderson Rudnick
Wealth Advisors

2018 Heritage Club Luncheon Sponsor

Kayne Anderson Rudnick was our luncheon sponsor and also manages the United Way endowment funds. Kayne Anderson Rudnick is regularly listed as one of the top 10 Independent Financial Advisors nationwide.

2018 Heritage Club Luncheon Photos

More event photos are at unitedwaysbgift.org/HeritageClub.



Jennifer and Michael Bergquist



Amber and Steve Ortiz



Lucille Owens



Ruth Intorre and Richard Long



Jeanne Brown and Shanna Taylor



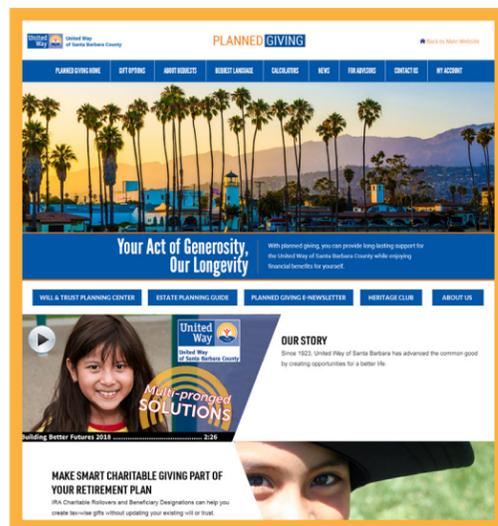
Penny Rowan and Paul Didler



VISIT OUR NEW PLANNED GIVING WEBSITE

We are excited to unveil our new planned giving website where we can share with you the latest news, personal planning tools, Heritage Club news, gift stories, finance news, timely articles and our free 2018 Wills & Trusts Guide.

Visit us at unitedwaysbgift.org.



PLANNED GIVING COMMITTEE



Michael Bergquist, Shanna Taylor, Dennis Forster, Diane Doiron, Joe Lanza, Suzi Schomer, Joseph Green, Marilyn Anticouni

CHAIR

Diane Doiron, CLU

MEMBERS

Marilyn Anticouni, Esq.
Michael Bergquist, JD, CFP
Dennis Forster, CFP
Joseph Green, Esq.
Joe Lanza, CPA
Suzi Schomer

Since 1982, under the guidance of this premier group of volunteer estate and financial planning professionals, United Way has offered a variety of techniques which are individually tailored to meet the philanthropic desires of our donors. These gifts provide perpetual support for United Way of Santa Barbara County's unique and innovative programs and improve the lives of children, families, and seniors in our community. Learn more about our committee at unitedwaysbgift.org/Committee.

CONTACT US AT UNITED WAY OF SANTA BARBARA COUNTY

320 E. Gutierrez Street
Santa Barbara, CA 93101

unitedwaysbgift.org

Shanna Wasson Taylor
Gift Planning Services Officer
1-805-882-0502

staylor@unitedwaysb.org



HERITAGE CLUB NEWSLETTER

FALL 2018

Building Better Futures Together



HERITAGE CLUB CELEBRATES LEGACY GIVING

33rd Annual
Heritage Club
Luncheon

PAGES 2 - 3

2018 Heritage
Club Photos

PAGE 3

New Planned
Giving Website

Planned Giving
Committee

PAGE 4

INSERT

2018
Planning Brief



Tom & Barbara Brashears – 2018 Heritage Club Luncheon

The Heritage Club was established in 1982 as one of the first United Way planned giving societies in the country. The Heritage Club honors forward-thinking individuals choosing to improve the lives of children, families, and seniors in our community by including United Way in their estate plans.

The highlight of the year is the annual Heritage Club Luncheon, hosted by United Way of Santa Barbara County. Members gather to celebrate each other and the work their gifts make possible. This year, we enjoyed the spectacular view at The Harbor Restaurant on Stearns Wharf. Members reminisced, reconnected with old friends, heard from CEO, Steve Ortiz and enjoyed a delightful lunch sponsored by Kayne Anderson Rudnick.

Thank you Heritage Club members for long-lasting support that will continue to improve the lives of children, families and seniors in our community for years to come.



Heritage Club