

### 34<sup>th</sup> ANNUAL HERITAGE CLUB LUNCHEON *continued from page 1*



UWSBC presented its 2019 Legacy Supporter of the Year Award to Maryan Schall, who began her relationship with United Way of Santa Barbara County soon after moving to the community with her husband Dick in 1989. Maryan Schall earned two masters and a doctorate in various areas of communication and became a consultant specializing in women in the workplace. Dick Schall had a distinguished business career. "When United Way made the shift to not only funding other charities, but also providing direct, life-changing, research-based services to children and adults, the fit between the Schalls and United Way became stronger, particularly around their common interest in early childhood education, particularly for Maryan," said Diane

Doiron, UWSBC planned giving committee chair, while introducing Maryan.

Following Dick's death in 2015, Maryan increased her engagement with UWSBC, which included joining the Board of Directors and becoming a founding member of Women United. Dick and Maryan Schall made plans to include UWSBC in their estate plans years ago.

UWSBC also presented its 2018 Legacy Supporter of the Year Award to Earl Damitz, who was unable to attend last year's ceremony. A retired expert on the tax economics of charitable giving and long-range financial planning, Damitz is UWSBC's founding planned giving committee chair and has been committed to United Way's mission since 1953.



Damitz and his wife Merrilyn are three-time Heritage Club donors, having committed gifts both personally and through

Damitz, Brooks, Nightingale, Turner & Morrisset.

For more Heritage Club News, visit the Heritage Club page on our website [www.unitedwaysbgift.org/HeritageClub](http://www.unitedwaysbgift.org/HeritageClub).

### MULTI-PRONGED SOLUTIONS CREATE BRIGHTER FUTURES THANKS TO HERITAGE CLUB



Since 1923, United Way of Santa Barbara County has advanced the common good by creating opportunities for a better life. You first knew United Way as Santa Barbara's community fundraiser. Today United Way is that and so much more.

Today United Way also provides direct life-changing research-based services to 25,000 children and adults annually. UWSBC strives to address local needs like literacy. 59% of 3rd graders in Santa Barbara County read below grade level.

Reading deficits are at all socioeconomic levels and contribute to high dropout rates, absenteeism and low achievement.

United Way donors make the critical difference for children and families to begin building better futures.



*continued on page 4*

# MULTI-PRONGED SOLUTIONS CREATE BRIGHTER FUTURES THANKS TO HERITAGE CLUB continued from page 3

United for Literacy's multi-pronged strategy improves reading abilities every day, creating a community of life-long readers prepared for success. Over 7,000 students improve reading skills daily. Many students move from below grade level reading to above grade level reading in a single school year or summer. 13,000 books are distributed annually to toddlers with limited access to age appropriate books. Annually, 200 children with no preschool experience learn pre-reading and classroom skills.



Multi-pronged solutions to big issues like literacy require financial stability.

Our legacy society, the Heritage Club, was established in 1982 to create that stability. Through wisely planned gifts, members change lives for generations to come. Under the guidance of a premier group of volunteer estate and financial planning professionals, United Way offers a variety of techniques which are individually tailored to meet the philanthropic desires of our donors. Gifts come in many forms: Bequests, Retirement Account, Life Insurance, Charitable Gift Annuities and more.



UWSBC Planned Giving Committee

Thank you Heritage Club members, for your commitment to creating brighter futures.

## CONTACT UNITED WAY OF SANTA BARBARA COUNTY

320 E. Gutierrez Street  
Santa Barbara, CA 93101

[unitedwaysbgift.org](http://unitedwaysbgift.org)

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

[staylor@unitedwaysb.org](mailto:staylor@unitedwaysb.org)



# HERITAGE CLUB NEWSLETTER

FALL 2019

Building Better Futures Together



## 34<sup>th</sup> ANNUAL HERITAGE CLUB LUNCHEON



34th Annual  
Heritage Club  
Luncheon

PAGES 1 - 2

Multi-Pronged  
Solutions  
Create Brighter  
Future Thanks  
to Heritage Club

PAGE 3 - 4

### INSERTS

2019  
Heritage Club  
Luncheon  
Photos

Day of Caring  
Prep Day  
Sept 5

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 2019 annual Heritage Club Luncheon was sponsored by Kayne, Anderson, Rudnick. More than 30 Heritage Club members came together for the luncheon at La Cumbre Country Club, as the guests of John and Susan Hanna. Each member has included United Way of Santa Barbara County (UWSBC) in their estate plans to support UWSBC and its programs, which further youth education, health, and financial stability in the community.



Kayne Anderson Rudnick  
Wealth Advisors

Each member has included United Way of Santa Barbara County (UWSBC) in their estate plans to support UWSBC and its programs, which further youth education, health, and financial stability in the community.

continued on page 2