

Volunteers Are the Heart of Our YMCA

A Thank You to Those Who Make Our Work Possible

Frank Berlin—Where It All Began

The Sarasota Family YMCA was founded in 1945 when the late Frank Berlin and some volunteers went to Atlanta to set it up. From thereon until his death in 1997, Frank never left our Y, remaining a trusted advisor, Board member and donor. Throughout our 65 years, we've been enriched by so many brilliant, hard working and generous volunteers.

We log thousands of volunteer hours each year, and there is simply no way we could achieve our level of outreach without our volunteers. This is especially true at the Foundation, where we've always been small but even more so in this economic downturn. "The math is pretty simple. Jobs that are filled by volunteers are donor dollars we can spend to save a kid," says Karin Gustafson, Y Foundation President.

Ed Landis and Paul Bowman

Our volunteers do everything from organizing and running special events to helping run the business of our organization. We figure we're pretty lucky to have the leadership of Paul Bowman at the Foundation and Ed



*Joan Wilson, Sharon Kenworthy,
Nola Hietbrink and Glenda Gutbric*

Landis at the Metro Board because both of these gentleman have the kind of business acumen we could never afford to pay for.

First Citizens Wayne Seidl and Flori Roberts

This year we honored Wayne Seidl as our YMCA First Citizen. Wayne's history with us goes back 35 years, when he helped with maintenance chores. Today he serves as a trusted estate planning advisor and donor. Successful national business woman and marketing whiz Flori Roberts, who clocks hundreds of volunteer hours for us and so many other charities, follows Wayne as our 2011 First Citizen.

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OF SARASOTA, INC.**

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Lynn Bonnett

This spring the Y was asked to help the Baltimore Orioles with parking cars. Lynn Bonnett, who owns Sarasota Roofing and chairs the Berlin Branch Board, stepped up and ran the whole thing, clocking well over 100 hours heading up the recruiting of volunteers and assigning every one to a location in several parking lots each game day. "He's truly the poster boy of a Y volunteer because he's never said no to a job in over 20 years," says Jim Purdy, YMCA Senior Vice President.

Premium Estate Liquidators

On April 10, Premium Estate Liquidators, our all-volunteer estate sales entity, celebrated its 10th anniversary. This group of about 40 skilled volunteers conducts estate and moving sales that benefit YMCA programs for at-risk kids. Founded by Joan Wilson, Pal Jones and Donna Hardin, with Glenda Guthrie, Nola Hietbrink and Sharon Kenworthy currently assisting with leadership roles, this group has clocked more than 10,000 volunteer hours and is reaching the \$300,000

mark in consignment proceeds. In addition to the excellent job they do in cleaning, pricing, staging and selling at these sales, they're also among our most ardent donors. Some have made provisions for us in their wills and, most recently at an April afternoon tea, made commitments to sponsor educational scholarships for our graduating Y Achievers.

Janet Kane

At the 2009 Element Au (GOLD) Gala, we honored Janet Kane with the Heart of Gold Award. On May 4, family and friends gathered for a memorial tree planting honoring her 20-year dedication and devotion to our Foundation. When we think of volunteer and heart, it's about people like Janet who set a very high standard for others to follow. She, like so many of our volunteers, was never afraid to roll up her sleeves or open her wallet or her heart to lift up and reach out to others.

Interested in getting involved? Call our office today to learn about the ways you can support the YMCA Foundation of Sarasota.

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For further information, please contact

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even from a modest estate. Consider the following two scenarios:

- **If you're determined to avoid taxes altogether on your retirement plan assets**, you could leave them to an eligible charitable organization, such as ours, and build an inheritance for your loved ones from other assets, such as life insurance or property.
- **If much of your nest egg is tied up in a retirement plan**, you may have little else to leave to family. In that instance, an alternative may be to donate a percentage of your retirement plan accounts to a charitable beneficiary, thus taking greater control over how the funds in these accounts will be used while still providing for the needs of family and friends.

How to Make Gifts From Your Retirement Plan

You can accomplish this tax-efficient form of giving in three easy steps:

- 1 Simply contact your retirement plan administrator for a change of beneficiary form.
- 2 Decide what percentage you would like us to receive, and name us, along with the percentage you chose, on the beneficiary form.
- 3 Then, return the form to your plan administrator.

Please Ask Before You Act

Consulting an estate planning attorney is a smart investment that can save you and your family money and heartache in the long run. Please seek legal advice before deciding who will get what in your estate plan.

Let Us Know Your Communication Preferences

We are especially pleased when donors like you share their future gift plans with us. Not only does our staff feel good about having the opportunity to thank you properly, but we have the chance to share with you our plans for upcoming programs and initiatives, as well as recognize your generosity at special events or in our publications.

If you decide to reveal your plans, we promise to respect your time and communication preferences. If you ever feel you receive too many mailings or calls from our gift planning office, please contact us to express your communication preferences. And if you prefer to remain anonymous, we respect that wish as well—and express our sincere gratitude!

Yours Free!

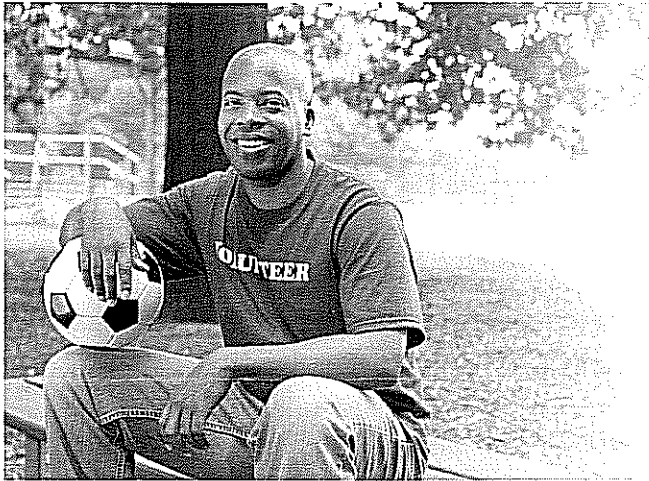
Put Your Retirement Plan Assets to Good Use

You can do more with your retirement assets than allow taxes to diminish their value to your loved ones. Learn more in the **FREE** guide **A New Use for Your Retirement Plan Assets** by completing and sending the enclosed reply card.



Who Will Your Retirement Plan Benefit?

The Cost of Passing These Assets on to Your Family



Your most valuable assets may also constitute the biggest tax bill for your heirs. Yet recent national research shows there's a less than 50/50 chance your loved ones realize the tax consequences headed their way.

For many of us, 401(k)s, IRAs and pension plans constitute the bulk of our net worth, aside from our homes. So, naturally, when those of us who expect to leave an inheritance imagine how our generosity might be used after we're gone—to pay for a grandchild's education or to help loved ones live more comfortably—it's these hard-earned dollars that we assume will provide for this dream.

Reality Check

A recent national research study shows that more than half of Americans aged 30 and older are largely unfamiliar with the way in which taxes can eat up the value of their retirement accounts when they name a person as a beneficiary. The fact is, for the wealthiest Americans³, income taxes can eat up 35 percent of retirement plan funds when left to loved ones. Future estate taxes may also apply.*

While the majority of people will pay less in taxes, anyone who inherits retirement plan funds will be subject to income tax on all withdrawals. Although there are ways in which spouses can defer taxes on these assets, they, too, are subject to income tax when they make withdrawals.

A Win-Win Alternative

An estate planner can help you structure your estate so family members will pay the least taxes. Wisely, experts sometimes advise putting a charitable component into the plan because qualified charitable organizations, like ours, receive contributions tax-free. Unlike your family members, we will receive the full value of your retirement plan assets. Plus, you can rest easy knowing you can change your mind about who will inherit your retirement plan assets at any time.

Charitable gifts from retirement plan assets often allow you to make larger gifts than you thought possible—

COMPARE THE TAX CONSEQUENCES

\$100,000 Retirement Plan Left to Family vs. the YMCA

Your chosen beneficiary	Your family	YMCA
Value of retirement plan at your death	\$100,000	\$100,000
Federal income taxes (assumed 35 percent marginal income tax bracket)	\$35,000	\$0
Net amount paid to beneficiary	\$65,000	\$100,000

*Currently, federal estate taxes are repealed for all deaths that occur in the calendar year 2010. In 2011, estate taxes are scheduled to be reinstated for estates worth more than \$1 million at rates up to 55 percent. Congress, however, is likely to address reinstating estate taxes before 2011. What the final legislation will look like and when it might become effective is unknown at this point.