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Fall 2013

Issue: 5

Spotlight on Philanthropy

ESKATON[®]
FOUNDATION

Eskaton Foundation Newsletter

It's time to help seniors. Join the movement!

Typically, giving to senior causes is not the first choice of the average person or company when planning their philanthropic budget. We aim to change that by highlighting the growing needs of our senior population.

It's never happened before -- shifting demographics show that the fastest growing age group in California is 85 and older and in our region there are more older adults than there are children 0-18. Fortunately, many seniors are supported by their family and church but sadly many are not.

An exciting way that women are participating in helping seniors is through the inaugural [Capital Region Women's Conference on Health and Wealth](#). Selected as a beneficiary of the conference, Eskaton Foundation is extremely grateful and excited about the opportunity.

The conference is on Friday, September 27, 2013 from 9 a.m. to 6 p.m. at the Sacramento Convention Center located at 1400 J Street in Sacramento. With more than a dozen panels and keynotes, topics will range from wealth management and identifying the new definition of wealth to finding balance between work, family, and passions. Over 2,000 attendees will hear stories from experts, participate in a real-time social media game, and connect to tools, resources, and a 24,000 square foot marketplace of wealth and wellness vendors.

Eskaton Foundation is pleased to be front and center with a 10 feet by 20 feet interactive exhibit booth. I invite all attendees to stop by to relax, learn and win. Our giveaway is a super stylish bag that talks. Seriously, it's interactive if you download the free Digimarc Discover app on your smart phone.

I am pleased to share that we have a bus load of residents attending from our Eskaton Village in Roseville and many of our female executives are attending as well. I hope that you will attend too. To reserve your spot, go to www.capregionwomen.com today! Don't wait because the tickets are going fast.

Spotlight on Philanthropy is a dynamic tool that we envision using for years to come to promote philanthropy at Eskaton. I look forward to hearing from you. Please contact me anytime at 916 334-0810 or [email me](mailto:). You can also visit our webpage at www.eskaton.org/donations.

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DONATE NOW



Visit the Eskaton Foundation booth at the Capital Region Women's Conference.



Sponsorships wanted for this September 30 event!
For information, click the logo or contact Lisa Smoley at lisa.smoley@eskaton.org.

Thank you.



Kim Rhinehelder
Vice President, Philanthropy

Impact of Philanthropy: Telephone Reassurance brings joy and peace of mind to seniors

"It was love at first sight. Trixie and Iva seem to be a match made in heaven and have already bonded," explained Linda Whiteside, supervisor of Eskaton Telephone Reassurance. Through the program, seniors in the greater Sacramento area who live alone receive regular phone calls from volunteers.



Telephone Reassurance participant Iva with her new pet, Trixie, and former staff member Brenda.

Iva is 92 years old and has participated in Telephone Reassurance for seven years; Trixie is her new pet. For the past several weeks, Iva had been in a state of grief because she had lost her little dog. She would often break down crying when the volunteer called. When Iva expressed interest in having another dog that would sit on her lap and keep her company, Volunteer Coordinator Therese Henning went to work to find her a new companion.

As luck would have it, Brenda, who previously worked with the Telephone Reassurance, stopped by the office and mentioned that she needed to find a new home for Trixie, a gentle little 8-year-old Shih Tzu, Pekingese and Schnauzer mix. Brenda took Trixie for a visit with Iva, and the plan was soon finalized. Brenda later sent a note to the team, "Thank you so much for helping me find a new home for Trixie. I'm happy she is going to a Telephone Reassurance participant who will have time for her, take care of her, and cuddle with her."

For 17 years, Telephone Reassurance has been a vital public service for older adults in the greater Sacramento area. Socialization, peace of mind and a friendly voice are all part of the program. Seniors who participate in the program have much in common. They want to continue living independently at home, have few financial resources, and do not have friends or family members

Guardian Angels

Through the Guardian Angel program, hundreds of Eskaton residents and participants have made donations in recognition of exceptional service provided by an employee or volunteer. The following employees have received five or more pins. Congratulations!

Rose Abeyta
Debbie Bailey
John Baltar
Sharon Baltar
Kevin Carlson
Sushil Chand
Debbi Duval
Linda Fisher
Donna Garrett
Robin Herman
Sherriton Kerr
Gazelle Lau
Denise Misner
John Rader
Marlene Rinesmith
Jim Shott
Lisa Smith-Youngs

To make a donation online now, [click here](#), designate the Guardian Angel program, and check the Tribute box to honor your Guardian Angel.

President's Circle

Each name listed below represents the generosity of an individual, company or foundation that has given \$1,000 or more and signifies the love and compassion of humankind. Every gift to Eskaton Foundation makes a difference in someone's life.

Below are names that were recently added to the list.

BILD & Company
Karl Bucholz and Karen Robison
California Foundation for
Stronger Communities
California Surveying and Drafting
Supply
Cedar Family Trust
Family of Muriel Emerson
HD Supply Healthcare Solutions
HEDCO Foundation
Shawn Kassel
Liberty Safes
Nancy L. Ober

who can check on them regularly. Volunteers make hundreds of phone calls every day, seven days a week, 365 days a year.

Each phone call is more than a wellness check. Trained volunteers engage in conversations with participants about family, how they are feeling, or whatever they would like to discuss. Seniors feel more socially engaged, and develop warm relationships with volunteers. Phone calls can lessen or eliminate the worries of seniors living alone. One participant commented, "You really know how to lift a person's heart with your kindness to me. ... I feel like I have family with all of you." Some participants have received timely medical intervention as a result of volunteer actions.

Home visits are among the most valuable and rewarding aspects of the program for both seniors and volunteers. Two to four times a month, some participants receive visits from volunteers.

Last year, Telephone Reassurance made nearly 100,000 calls to 623 people. A knowledgeable aging-services professional is also available to provide free information and assistance on a range of issues to participants and concerned family members and friends. This program is partially supported by Eskaton Foundation.

Philanthropic Partner Program: Udaya Patnaik to speak at Annual Breakfast

Get ready for an outstanding presentation at the Third Annual Philanthropic Partner Annual Breakfast on **December 6!** This year's speaker is Udaya Patnaik, co-founder and principal of Jump Associates, a strategy and innovation consulting firm that specializes in helping companies grow. The topic of the presentation is reinventing business by creating widespread empathy and proactively strategizing in anticipation of unprecedented demographic shifts.



**Udaya Patnaik, co-founder
and principal of Jump
Associates**

The Annual Breakfast will honor Eskaton Foundation's generous Philanthropic Partners. The **Philanthropic Partners Program** is a great way to network with peers from other companies, access learning opportunities about senior care for your employees or clients, and gain market exposure for your company. Many Philanthropic Partners choose to support an Eskaton program that exemplifies their corporate values.



SAFE Credit Union is a stellar example of a local company doing good. The company proudly supports Eskaton Foundation and Live Well at Home, which provides assistance to seniors who choose to maintain an independent lifestyle. "The Live Well at Home program fits very well with our business practices that help our members improve their well-being," explained Jim Allen, vice president of community banking.

Nurse Next Door
Phoenix Risk Management
Insurance Services, Inc.
Rediger, McHugh &
Owensby, LLP
Ruth Reis
Sierra Health Foundation
Smith Group Architects
James G. and EmilyAnn Standley
Trust
Peggy Wood
Union Pacific Foundation



Eskaton's workplace giving program that benefits Eskaton Foundation just celebrated its third anniversary. Participation has grown each year, from 7 percent, to 13 percent, to 20 percent at the end of the third year. Are you an Eskaton employee? You can join the movement!

The company is founded on the philosophy of people helping people. SAFE Credit Union takes great joy in perpetuating that philosophy by helping the community through a variety of philanthropic and volunteer efforts. "Last year we provided more than 1,400 employee volunteer hours and 100 financial literacy classes, and made financial contributions in excess of \$270,000 to improve the lives of those in our community," continued Jim.

To learn how your business can benefit from the Philanthropic Partners Program, please contact Carrie Johnson at 916 334-0810.



SAFE Credit Union Chief Executive Officer Henry Wirz with Gail Gephardt, executive director, Live Well at Home; Carrie Johnson, director of corporate giving, Eskaton Foundation; and Jim Allen, director of corporate giving, SAFE Credit Union.

The Popular, Practical Charitable Gift Annuity

An annuity is "the payment of an annual amount or allowance." A charitable gift is, well, a "gift to charity." Put them together and you have a Charitable Gift Annuity -- the giving technique with something for everyone. It's an ideal plan for those who would like to make a significant gift but depend on income from their assets.

A charitable gift annuity (CGA) is a simple contract between the donor(s), an individual or couple, and Eskaton Foundation. In exchange for a contribution from the donor(s), the charity promises to make fixed payments for life to one or two annuitants, usually but not necessarily, the donor(s). The amount paid is based on the age of the annuitant(s). The charity invests and manages the contribution and when the last annuitant has passed, uses the remainder of the contribution for its charitable purposes.

Is a CGA safe? Yes, indeed. It is backed by the full resources of Eskaton Foundation.

Are there tax benefits to such a gift? Yes, again. The donor is entitled to an income tax charitable deduction for the "gift portion" of the contribution. Payments to the annuitant(s) are partly tax-free. When long-term appreciated securities are contributed, tax on any capital gain is reduced and, if the donor is an annuitant, the tax may be deferred.

A CGA is irrevocable and the principal cannot be returned. Also, because a charitable gift is involved, the payment rates may be somewhat less than those associated with commercial annuities. Nevertheless, they generally provide greater cash flow than fixed investments, and the tax benefits are an added bonus.

To learn how a CGA might work in your particular situation, please contact: Kim Rhinehelder at 916 334-0810.

Charitable Gift Annuity Rates Chart

YOUR AGE (When you establish your gift annuity)	YOUR RATE (Based on your age)
90	9.0%
85	7.8%
80	6.8%
75	5.8%
70	5.1%

Board Project 2013: Upcoming Events

Under the leadership of Tim Ray, Eskaton Foundation board member and vice president, external affairs, AT&T Services, Inc., 2013 Board Projects are well underway and moving forward with huge success. Having a dedicated board of directors who meet their goals is unique. Eskaton Foundation's Board of Directors is made up of dedicated community leaders who understand their roles and are committed to meeting our mission. THANK YOU!



Ken Wenham, Eskaton Foundation board member, at Tim Ray's board project "An Evening with the Chef" at Mulvaney's B&L, June 17, 2013.

2013 Board Projects

June 17

Tim Ray - Dinner at Mulvaney's B&L

September 16 Kick-off

Wes Justyn - Clothing Drive

September 27

Winnie Comstock and Darci Gilbert - Capital Region Women's Conference

September 30

Shawn Kassel - Golf Special Game

October 6

Robert Harris - Poker Tournament

November 6

Melinda Eppler, Theresa Paige and Cynthia Adamson -Shop for a Cause

Dates to be determined

Guy Adams - Email Blast Ask (November/December)

Dave Dess - Email Blast Ask (November/December)

Kevin Hamm - Wine Label Event

Todd Murch - Wine Raffle (November/December)

Pamela Schubert - Video Ask

Ken Wenham - Email Blast Ask (November/December)



At "An Evening with the Chef": Max Harris; Pamela Schubert, chair, Eskaton Foundation Board of Directors; and Colleen Ray.



Board of Directors Showcase: Dave Dess

When sought after by a head-hunter to work for VSP and move to Sacramento from Baltimore almost four years ago, Dave said, "It was one of those God things - tapping on my shoulder." Having never heard of VSP, he felt an overwhelming need to come to Sacramento because both his parents who live here were just turning 90 years old.

Dave's marketing experience of more than 30 years is vast. He has been fortunate to work for international, domestic, for profit and nonprofit companies all at varying stages in their business cycle. He's worked for companies including Coors, Pepsi Cola, Bausch & Lomb, UnitedHealth Group, Sprint PCS, and Erickson Senior Services. One of his great accomplishments was growing Sprint PCS from zero in revenue to \$48 billion in revenue during a 10-year period.

"I believe Dave is a marketing guru. He is so good at what he does that he inspires me to think differently, be more creative, and consider innovative options and ideas. And what he says next is why he's a genius at what he does," said Kim Rhinehelder, Eskaton Foundation vice president of philanthropy.

"At the end of the day, the success factor is meeting the customer's needs. It's not really more complicated than that," replied Dave when

When asked about his time on the Eskaton Foundation Board of Directors, Dave said when serving on the board came up as a possibility, he jumped at the chance. He believes seniors are an underserved population and is dedicated to helping seniors live graciously. Dave lives with his wife Sandy in El Dorado Hills. He has a son, Brian who is 24 and a daughter, Emily who is 20.

Although Dave does not have a favorite quote, he did say that his favorite saying is simply, "Onward." He explained, "The idea is that whatever we're dealing with, whatever challenges come our way, moving ahead and moving forward is important." So, "Onward" we go!

Create Your Legacy Today!

Join the movement ... and help Eskaton Foundation serve seniors. Make a lasting difference for generations to come. Thoughtful estate planning enables you to provide a much greater impact than you ever imagined. Regardless of the amount, your legacy gift will help. Is it time to update your estate plan? Reminder ... you should review your plan at least every five years! Call your attorney or consider one of the Eskaton Foundation professional advisors listed here:

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**Attorney makes house calls.*

Vicky Cross Receives Employee Philanthropist Award



Photo by The Gemmill

Vicky Cross has been awarded Eskaton's Second Annual Employee Philanthropist Award. As executive director of Eskaton Lodge Granite Bay, Vicky played an instrumental role in the success of Eskaton Foundation's first capital campaign, which raised funds to construct a beautiful new community room for group classes, social events, and other activities. With the goal of building excitement for the campaign,

Vicky encouraged staff to organize a series of fundraising activities that raised an astounding \$13,000!

Currently the executive director of Eskaton Village Roseville, Vicky believes that active involvement in philanthropy makes the already-vibrant Eskaton communities even better. Looking back on the success at Eskaton Lodge Granite Bay, she said, "It was a big thing to tackle, but right away we all made it fun. Every month we had something."

Growing up, Vicky had not been exposed to philanthropy. She explained that when she started getting involved in philanthropy at Eskaton, "It really got to my heart. I wanted to be a part of it. A wave swept over my heart to donate to ones in need."

The Employee Philanthropist Award is given each year to an Eskaton employee who amplifies philanthropy in his or her community. The recipient is presented with the award at Eskaton's Annual Business Meeting, and featured in Eskaton's Annual Report. Criteria include: (1) Employee is a Fan of Philanthropy; (2) Employee takes the extra step to support philanthropy and its efforts; (3) Employee understands the importance of philanthropy; and (4) Employee is involved in Eskaton Foundation and its fundraising opportunities.

Congratulations Vicky!

REMINDER: IRA Charitable Rollover

The IRA Charitable Rollover is still available through December 31, 2013. Taxpayers age 70 ½ or older are eligible to transfer up to \$100,000 directly from an IRA to a qualified charity without paying income tax on the distribution. The transfer qualifies for credit against your annual RMD (Required Minimum Distribution). Call today: Kim Rhinehelder, 916 334-0810.

Kim Rhinehelder, VP of Philanthropy
Eskaton Foundation

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