

Foundation Corner

Mission & Vision

The Casa Foundation is a non-profit corporation, sanctioned by the State of California, committed to developing, accepting, overseeing, administering and disbursing philanthropic resources for the benefit of the Casa de las Campanas Continuing Care Community and its residents.

The Casa Foundation strives to encourage the ethical and professional growth of philanthropy for the purpose of enhancing the lives of Casa residents and continuing a legacy of service excellence in the Casa de las Campanas community.

The Casa Foundation is a public nonprofit 501(c)(3).

Your gifts to the Casa Foundation qualify for income and estate tax deductions.

Consult your tax advisor for appropriate procedures on the tax deductibility of your gifts.

World of Opportunity

Thank you for contributing to the Casa Scholarship Campaign

After a delayed start due to the Coronavirus pandemic, the annual Scholarship campaign was kicked off on June 15th, and it is now in full swing.

This year celebrates the 32nd year of an annual tradition. Last year, 52% of our residents contributed to the effort, and we are hoping to reach or surpass that participation milestone this year as well. Gifts of any amount are treasured, so give what you can. Some residents have asked "What is the average amount?" Last year, it was \$272.

Casa employees are deeply appreciative of scholarship awards, which have also been an incentive for attracting young and talented staff members.

This year's Scholarship Committee is co-chaired by Sonny Googins and RZ Norris. Other members include Carol Rhodes, Harry Packard, Vickie Turnage, Art Townley, Rita Petrella,

and Caryl Rigler. The committee reviews each application and determines an award based on need and available funds. Last year's awards were as high as \$3,500 per student.

Donations made online are very much appreciated. It saves time for everyone. On Touchtown, you can simply click on the "Scholarship Drive Button" and click on "Donate Here." Or you can go to our website at thecasafoundation.org. Click on the "Donate Now" button located on any page and follow the instructions.



In a world where you can be anything, be kind.

Unknown



Make it Easy

Visit Our Website & Make Your Donations Online



If you haven't visited the Foundation's website yet, we encourage you to do so. The address is thecasafoundation.org. You will find lots of helpful information there.

If you are planning on making a contribution, we encourage you to do so online. Just click on the "Donate Now" button found on any page and follow the instructions. It is super easy, and it helps us out in the office as well. An immediate receipt to your email is generated.

We accept any form of electronic payment, including debit and credit cards and eChecks/ACH. The site is PCI compliant and meets all the strictest security protocols. This means you can rest assured that your donations will be processed safely and securely.

Thank You

Thank You for Your Partnership in our Mission



Thanks to everyone who has contributed to the Casa Foundation. This has resulted in providing benefits for

many projects and programs that have made Casa a better place for all residents.

All money released by the Foundation is reviewed by the Resident Advisory Committee before final approval by the Foundation Board of Directors. Restricted-use funds also ensure that money is used only for purposes designated by our donors.

The Foundation also helps to keep monthly service fees reasonable. \$250,000 in expenses is equal to about 1% in service fees. This year, the Foundation has distributed \$535,779 to pay for various Casa programs and services through June, 2020.

Legacy Spotlight

Garry Butterfield

Board Director, Advisory Committee Chair & Legacy Member

Garry Butterfield is always at the top of the list when someone is looking for a person with leadership capabilities.

Garry moved to Casa in February of 2014 with his wife Mary, who passed away in 2018. They became Legacy

Society members in 2017 with a charitable gift annuity. Garry now serves as the Chair of the Foundation Advisory Committee, which he joined in 2016, and was appointed to the Foundation Board in January of this year. He has also served on the Finance Committee.

Although Garry was born in Minnesota, the middle of three children, his family made the move to San Diego two days after his graduation from high school. He had the responsibility of driving the 1-1/2 ton moving truck across country, which was no small feat. Once here, Garry attended San Diego State, graduating in 1957 with a BA in Radio & Television Broadcasting. I can totally imagine Garry as a radio/tv personality, but life eventually took him in other directions.

After working at the San Diego Zoo as a tour-bus driver while attending college, he took a position at the Helix Water District in La Mesa as a Public Information Officer. Water districts kept his attention and from 1961 to 1977, he served as General Manager of the Ramona Municipal Water District. Prior to his retirement in 1992, Garry served as the General Manager of the Sweetwater Authority in Chula Vista.

Garry has served in many volunteer capacities including 10 years at Pomerado Hospital, 15 years as an RSVP volunteer with the San Diego Police in Rancho Bernardo, and 2 years as Chairman of the San Diego Regional Water Quality Control Board. He has also served as Vice Chair of the San Diego County Park & Recreation Commission and San Diego County Public Works Agency Advisory Board, and as a Director for the San Diego County Water Authority.



Charitable Giving Opportunities in 2020



Thank you to all of you who have contributed to the Casa Foundation. This has resulted in providing benefits for many projects and programs that have made Casa a better place for every resident.

During the past year, Congress has enacted several tax law changes. Here are several ideas to consider if you are thinking about making gifts:

SECURE Act. In January, Congress passed the SECURE Act, limiting stretch payments to IRA beneficiaries to 10 years. If you planned to benefit your children with your IRA, your heirs will now pay higher taxes on the inheritance they receive from you. When you revisit your estate plan, consider funding a testamentary charitable remainder unitrust with your IRA balance. This plan can provide lifetime payments to your heirs and spread out the taxes on their

inheritance.

Charitable Gift Annuity. If you are concerned about your financial security given the ups and downs of the stock market, you may want to consider making a gift to our charitable gift annuity program. You might be surprised by the benefits. You can exchange your low-performing stock, CDs or cash for guaranteed, lifetime fixed payments. You may also benefit from a tax deduction this year and a portion of your payments could be tax-free.

Estate Planning Concepts

Estate Planning Review Checklist from Robinson & Wilson



The Robinson & Wilson law firm provided this estate planning checklist:

- Do you know where your documents are?
- Do you have the following? Will, Trust, Durable Power of Attorney for Finances, Advance Health Care Directive, and HIPAA Release and Authorization?
- Who is your successor trustee? Is there a backup? Are these still the right people for the job?
- How will your assets be distributed under the trust after your death? Does this still match your intent?
- Who is named in your Advance Health Care Directive to make your medical decisions? Are they still the right people for the job?
- How are your bank and investment accounts titled? Are your accounts in the trust, or are they in your name?
- Who are the beneficiaries of your retirement plans? Do you have backup beneficiaries? You can confirm this by requesting a beneficiary statement from the financial institution.
- Have you recently reviewed the tax implication of naming beneficiaries of the retirement plans? Significant changes in the tax laws this year necessitate a review of your retirement plan beneficiaries with your financial advisor or estate planning attorney.
- Who are the beneficiaries of your life insurance policies? Do you have backup beneficiaries? You should request or download a beneficiary statement from the institution.
- Have you prepared a letter disposing of your personal effects (items inside your home, jewelry, cars)?
- If you are a married couple, have you reviewed your Trust with your attorney since 2010? Major changes in the tax laws passed in 2010 may mean that you have an unnecessarily complicated trust.

Roberta Robinson and Daniel Wilson are local estate planning attorneys on our referral list that have provided educational presentations to Casa residents. For more information on their firm, visit www.TrustLaw.us.

Your Generosity at Work



So far, Fiscal 2020 has been a tremendous year in terms of support. Please accept our appreciation. Year-to-date we have been able to distribute \$535,779. Here are the areas that have benefited:

Employee Appreciation	\$268,260	Resident Hardship	\$97,476
Scholarship	\$75,000	Health & Wellness	\$39,338
Transportation	\$30,000	Resale Rm Proceeds	\$14,866
RA Committees	\$10,528	Bell Tower Park	\$311

The most recent releases have been for health and wellness, including laptops, touch screens, and radios for Assisted Living and the Palmer Special Care Residence; replacement furniture for the Palmer Special Care Residence; and hand sanitizer kits for Casa residents.

You can feel good supporting the Foundation, knowing that \$250,000 in funding saves about 1% in monthly fees. Cumulative funding since inception totals \$7,777,715.

Call today for information on how you can make a difference!

Remembering Legacy Friends

The following Legacy members will be remembered in our hearts for their kindness to others and their efforts at making Casa a better place:

Mary Grosskopf: 05/10/1924 - 04/13/2020

Ginny Schwartz: 09/12/1928 - 05/24/2020



Current Funds

- Activities Fund
- Art Fund
- Chaplains Fund
- Health Center Fund
- Landscaping Fund
- Music Fund
- Norte Library Fund
- O'Brien Educ. Fund
- Resident Association Fund
- Resident Hardship Fund
- Rosenmeier Health Fund
- Scholarship Fund
- Betts Sur Library Fund
- Betts Sur Rose & Garden Fund
- Transportation Fund

Endowment Funds

- Tilburg General Endow
- Barkell Transportation Endow
- Carpenter Activities Endow
- Hegewald Health Endow
- King General Endowment
- Elizabeth Thiele/Margaret Gamble Music Endowment
- Levinson Norte Library Endow
- Maclean General Endowment
- Nauman General Endowment
- Newman Care Endowment
- Special Care Endowment
- Resident Hardship Endow
- **Scholarship Endowments**
 - Carl & Doris Burk
 - Noble & Jenny Chen
 - Forest & Gloria Fouts
 - Mack & Janet Gilkeson
 - Alice Greene
 - Hunt Family
 - Selma Johnson
 - Irv Kelley
 - Jeannine McCullagh
 - James Nauman
 - Freda Palmer
 - Carol & Bob Shogren
 - Fun-Den & Agnes Wang
 - Ken & Ellen Waters
 - Jung-Chien & Edith Yu

Thank You

Our Heroes Fund Donors



The Resident Association and the Foundation would like to thank all Casa residents who donated to the Hero's Campaign in May.

145 gifts totaling \$12,470 were received for this effort, and 84% of you made your gifts online, which we very much appreciated.

The Resident Association is working with management to determine how to best use these funds in expressing appreciation to Casa employees, all of whom have made it a priority to keep Casa residents safe.

We will keep you posted on the use of these special gifts.

Legacy Society Members

Legacy Society membership is extended to those individuals who have made cumulative, deferred or outright gifts of \$15,000 or more to the Casa Foundation. For information, contact Cynthia Steiger in the Foundation office at (858) 592-1898.

Living Memberships

Anonymous	Nancy Grobe	Neal & Betty*Macurda	Pat Schmitt
Allyn & Carol Axelton	Lyle Guell	Ed* & Elizabeth Malela	Julius & Virginia* Schwartz
Vince & Nancy Bacon	Julie Guinane	Marilyn Maloney	Bob* & Carol Shogren
Ann Bernstein	Peggy Hansen	Jo anne McBrayer	Dave Shoup/Carol Trowbridge
Jeanne Bleahu	Jerry*/Virginia Hargarten	Jeannine McCullagh	William* & Patricia Smith
Frank & Dolores Bugiel	Doris Hargrove	Fred McKnight	Gordon & Eve Spencer
Garry & Mary* Butterfield	David* & Ellie Harper	Suzanne Moran in memory of Peg Logan*	Rob Stalker & Sheri Fisher
Sue Cagni	Daniel Hassett	Stanley* & Ethel Neichin	Frank & Elena Sun
Peggy Casserly	Pat Heath	Jack & Ruth Nesselroad in honor of Orlene Ashcraft*	Sandra Suycott
Margaret Cauthen	Luella Bell Hill	Barbara Norrbohm	Barbara Tice
Noble Chen	Walter & Janette Hirsch	Harry Packard	Steve* & Nora Tung
David & Joyce Chong	Carol Hobock	Benita Page	Betty Velarde
Larry & Eleanor Cohen	Ruth Hohberg	William & Bette Pease	Virginia Vorous
Paul* & Sharlee Dennies	Georgia Hoover	Mary Elizabeth Pinkham	Fun-Den & Agnes Wang
Judy Dickey	Hua-Ching & Felicia Hu	Susan Pitt	Ken* & Ellen Waters
Jim & Virginia Estes	Charles* & Laura Ilka	Art & Jean* Pounds	Al* & Virginia Wehe
Jules & Perla Fox	Mim Josephs	Jane Prichard	Bob & Bonnie Welch
Sherl*/Joan Freudenberger	Barbara Kahn	Polly Ann Redifer in memory of Chuck Redifer*	Bob* & Netta Wells
Cliff * & Ann Frey	Margaret Kellogg	Resident Association	Janet Williams
Syvilla Fry	Chin* & Bok Lim Kim	Carol Rhoades	Ivon* & Patricia Wilson
Mack & Janet* Gilkeson	Dorothy Koerner	Dorothy Risheberger	Ernest & Janet* Winkler
Norm & Pat Gillespie	Marguerite Lawry	Rod & Valerie Rose	George Wynhoff* & Patricia Martin-Wynhoff
Bob & Sonny Googins	Tom & Dorothy Lee	Art* & Patricia Schauffert	
Don & Charlotte Gragg	Sam* & Joan Levinson		
Fred & Jody Grawey	Life Care Services		
Alice Greene	Richard* & Ann Ryan-Logan		

* Deceased

Deceased Legacy Members (not listed above, since 8/1/15)

Pauline Anderson, Geraldine Barrington, Virgil Calhoon, Barbara Chase, Fran Cleeton, Lyn Dougherty, Gloria Fouts, Erika Fry, Mary Jo Fulkerson, Eleanor Gafney, Blossom Gasper, Dottie Gifford, Eugenia Glow, Ralph Grahl, Mary Grosskopf, Pat Harper, Pauline Hoover, Jean Hunt, Dr. John Ingle, Catherine James, Selma Johnson, Priscilla Sue Johnson, Janine Kammert, Irving Kelley, Betty Kollisch, Bob Kroger, Jack & Sesuko Kuramoto, Dorothy Leslie, Wini McCluskey, Elaine McDaniel, Bob McKahan, Jean Miller, James Nauman, Laverne Oemcke, Barbara Oyler, Donna Peterson, Colleen Phelan, Betty Pitt, Vern & Jane Remer, Pauline Rogers, Barbara Rugger, Ruth Sandburg, Noreen Sandel, George & Margaret Scharnberg, Barbara Siniscalchi, Bill & Claire Spaulding, Mable Sullivan, Phyllis Tabak, Klaas Terpstra, Hilda Teutsch, Evan Vande Walle, Margaret West, & Janet Woodworth.

Welcome new Legacy Society members, Hua-Ching & Felicia Hu, Mim Josephs, and Rod & Valerie Rose.

Words to Live By

“Why do we only rest in peace? Why don’t we live in peace too?”
Unknown

Required Minimum Distributions

Waived for 2020

If you have one or more retirement plans, please take note. One of the changes brought about by the SECURE Act is that you can skip your 2020 RMDs from 401(k)s, IRAs, 403(b)s, and 457(b)s.

If your retirement plan has been adversely affected by stock market fluctuations, withdrawing money now may lock in some of these losses. If you don’t need to take the distribution, it may be more helpful to give your account time to recover some of its value. Because your RMD is based on the 12/31/2019 value, which was prior to the market decline, the distribution will be much higher as a percentage of the current value if the assets were invested in the stock market. Not taking your 2020 RMD will also allow you to defer paying income tax, as RMDs are considered taxable withdrawals.

If you want to take advantage of this new rule for 2020 and are taking RMDs systematically, **make sure** you contact your financial advisor to stop them. If you have already taken part or all of your distributions, you may be eligible to roll the money into an IRA or workplace retirement account if you do it within 60 days of the withdrawal, provided you do this only once within a 12-month period. If the 60-day deadline for a rollover contribution falls between April 1 and July 14, you have until July 15, 2020, to put the funds into a new retirement account.

If you took an RMD in January, it is a little tougher to undo things. However, if you or a family member contracted COVID-19 or suffered financial hardship as a result of the coronavirus pandemic, the distribution might qualify as a coronavirus hardship distribution (CRD). If so, speak to your accountant about classifying it this way, which will allow you to spread the taxes over a three-year period.

Foundation Advisory Committee

- Garry Butterfield, Chair
- Cynthia Steiger, Vice Chair

Donor Relations

- Marguerite Lawry, Chair
- Dan Beringhause
- Barbara Kahn
- Dot Koerner
- Harry Packard
- Carol Rhoades

Education

- Joan Levinson, Chair
- Jeannine McCullagh
- Benita Page
- Fun-Den Wang

Funding Review

- Joanne McBrayer, Chair
- Doris Hargrove
- Tom Lee
- Ethel Neichin
- Dottie Rischeberger

Foundation Officers and Directors

- Mike Stelman, Chair
- Jim Roth, Vice Chair
- Ethel Neichin, Secretary
- David Johnson, CFO
- Garry Butterfield
- Steve DeMatteo

Foundation Office

Cynthia Steiger
Fund Development Advisor
858-592-1898
E-mail: steiger@casadlc.com

Celebration of Life Memorial Wall



The Casa Foundation Celebration of Life memorial wall remembers Casa de las Campanas residents who touched our lives and played a vital role in our community.

This beautiful tribute is located in the lovely and tranquil setting of the Bell Tower Park, which is frequented by residents as well as visitors. It incorporates dedications to those remembered and features four back-painted, shaped glass panels simulating soft waves as background for engraved 3” x 6” glass tiles. Each tile includes the name of the person remembered, the dates of birth and death and up to two lines of copy for a special message.

The cost of \$500 per tile may be shared by friends and/or family. If you want to remember a loved one, special friend, or reserve a tile, contact the Foundation office at (858) 592-1898.