

A FORUM FOR DONORS, CHARITIES & ESTATE PLANNERS



5TH ANNUAL
COMMUNITY
PHILANTHROPY SUMMIT

THURSDAY, NOVEMBER 12, 2015

2011

CONRAD TEITELL

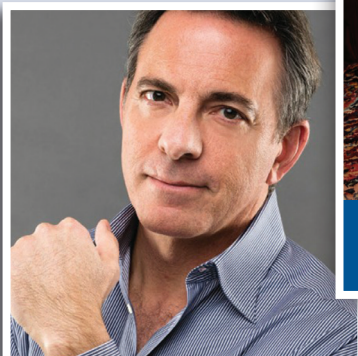


2012

JERRY PANAS



2013
DAN PALLOTTA



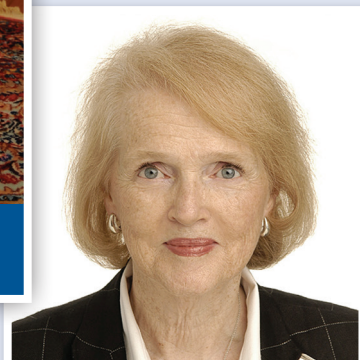
2015

CHRISTIAN THOMAS LEE



2014

**KAY SPRINKEL
GRACE**



*"Give - and somewhere, from out of the clouds, or from the
sacred depths of human hearts, a melody divine will reach
your ears, and gladden all your days upon earth."*

— GEORGE F. BURBA (1865-1920)

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Foundation – *Wine Down*

Wine & Roses – *Speaker*
Accommodations and Door Prize
Tim Ulmer – *Photography*

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PROGRAM SCHEDULE

7:45 AM	LOBBY	Registration & Pre-Event Networking Continental Breakfast
8:30 AM	KIRST	Opening Remarks
8:45 AM	KIRST	GENERAL SESSION – Family Legacies and Philanthropy DONOR PANEL – Peter Johnson, Moderator
10:00 AM		Break and Networking
10:30 AM	CRETE	Keynote Speaker – CHRISTIAN THOMAS LEE – <i>The Art of Philanthropy</i>
12:00 NOON	KIRST	Lunch and Networking
12:30 PM	KIRST	NATIONAL PHILANTHROPY DAY AWARDS – <i>Association of Fund Raising Professionals California Capital Chapter San Joaquin Extension</i>
1:00 PM	BREAKOUT SESSION #1	
B1-1	KIRST	DR. J. MITCHELL PERRY – <i>Operating from Strength: The Language of Inclusion</i>
B1-2	COTTAGE/ PISANO	BRIAN YACKER – <i>How to Avoid the Ire of the IRS and AG</i>
2:30 PM		Break
2:45 PM	BREAKOUT SESSION #2	
B2-1	KIRST	WADE HEATH – <i>Do Good. Be Great. – Rise of the Millennials</i>
B2-2	COTTAGE/ PISANO	LANCE LINARES – <i>Who's on deck? Planning for Succession Before the Ball's in Play</i>
3:45 PM	KIRST	Closing Remarks & Drawing
4:00 PM	KIRST	Wine Down – Networking and Wine Tasting
5:00 PM		Event Concludes

CO-HOSTED BY:





KEYNOTE SPEAKER CHRISTIAN THOMAS LEE

“The Art of Philanthropy”

The artistry of Christian Thomas Lee has been enjoyed for over twenty-five years. He has been the guest of some of the most distinguished gatherings in the world to include presidents, royalty, philanthropists and captains of industry. After 1,800 performances and five recordings, he has been given a unique position in the world of the fine arts.

Retiring from the international concert circuit in the mid 1990's following a four month Australasian tour, he has since been recognized for his philanthropic work through the private estate and home concert in the tradition of Franz Schubert's 19th century music salon.

His philanthropic efforts on behalf of nonprofit organizations and his advocacy for children's causes have been widely recognized from the White House to former presidents. In 2006, he was awarded the Point of Light Award in recognition of his national work on behalf of children's causes and also awarded the President's Call to Service Award for his volunteerism. President George H. W. Bush said of Christian, “Your acts of generosity and community action exemplify the spirit of service and set a standard of excellence to which people of all ages can aspire. You are a remarkable example of the generosity and compassion that helps to better our communities. I commend your work and thank you for being a shining point in the lives of the people of America.” Christian has consistently leveraged his considerable influence to inspire others to give to those in need.

He is a collector of fine art and his personal collection, acquired from Sotheby's and other international auction houses, includes works by Pablo Picasso, Peter Carl Fabergé, Giovanni Battista Pasqualini and Adolf Pirsch. The collection includes old master engravings, impressionist works, American and European historic documents and antiquities. Every year, his personal collection of fine art travels extensively to schools where it is shared with children. Over 75,000 children have experienced Christian's nationally recognized and award-winning application of Art and History in Schools. He has also been invited to lecture on the subject of creativity in education in numerous universities and colleges including; George Mason University, Marymount University, Texas Tech University, Baylor University, Lubbock Christian University, Houston Baptist University, and Columbia College.

Christian is recognized as a major advocate of philanthropy. Central to his heart and of primary motivation is a compelling desire to make a difference in the world by connecting the powerful with the weak, the rich with the poor, and the educated with the uneducated. Christian has achieved this through his love of sharing the fine arts. Please visit www.christianthomaslee.com for further information.

- Robert Finn, November, 2009 (Updated April, 2015)

MARK YOUR CALENDARS!

2016 COMMUNITY PHILANTHROPY SUMMIT

THURSDAY,
NOVEMBER 10,
2016!



JIM ESKIN 2016 Keynote Speaker

Jim Eskin's leadership roles span more than 30 years in fundraising, public affairs and communications in the San Antonio area. Fundraising benchmarks include establishing records for gifts from individuals at The University of Texas at San Antonio (UTSA), Our Lady of the Lake University (OLLU) and Alamo Colleges Foundation. In 2009, he began current responsibilities as Executive Director of the Alamo Colleges Foundation, the philanthropic arm of the community college system with an enrollment of more than 60,000 credit students per semester, more than all the other colleges and universities in Bexar County combined. Since then, foundation assets and scholarship dollars awarded have tripled. He has authored more than 100 guest columns that have appeared in daily newspapers and business journals across the country. He publishes Stratagems, a monthly e-newsletter exploring timely issues and trends in philanthropy, advocacy, and image. He also enjoys training board members and staff on fundraising principles and best practices.

SPEAKERS



TIM DALY

Master Of Ceremonies

ABC's award winning reporter Tim Daly joined the station in September 1991. Tim is a news reporter/fill-in anchor based in the ABC San Joaquin Valley newsroom. Through the years, he has covered a number of major stories, including the trials of Ellie Nesler, Charles Ng, Cary Stayner and Scott Peterson. Tim is active in the community, frequently speaking to groups and appearing at events in San Joaquin and Stanislaus counties.



WADE HEATH

Do Good. Be Great. – Rise of the Millennials

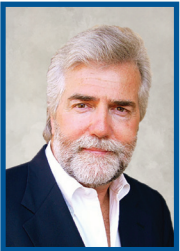
Wade Heath is a Millennial on a mission to help America understand that there are more good people than you realize—many of which are among his generation doing extraordinary things. A Walt Disney Legacy Award recipient and columnist with the Lodi News-Sentinel for the past decade, Wade combines his passion for storytelling and optimistic vision of a better tomorrow to drive his for-purpose media venture Do Good. Be Great., an online platform of podcasts, videos and connected social media that spotlights and supports uplifting content and young people who are making a positive difference in their communities. Wade also speaks to and consults with professionals, students, churches and organizations that are looking to be inspired by and apply the “Magic of Millennials.”



LANCE LINARES

Who's on deck? Planning for Succession Before the Ball's in Play

Since 1995, Lance Linares has been Chief Executive Officer of Community Foundation Santa Cruz County. During his leadership, their assets have gone from \$6 million to more than \$100 million. In addition, he oversaw development of a new building to house their offices and for the use of the greater Santa Cruz community. Previous to working for CFSCC, Lance served as executive director of a county-wide arts council for seven years, and was a station manager for a public radio station for 10 years. He has also served on state-wide and national boards, and on regional and national grant review panels.



DR. J. MITCHELL PERRY

Operating from Strength: The Language of Inclusion

Dr. J. Mitchell Perry is a renowned human behavior expert, an executive coach, trainer, speaker, author, and board-certified psychotherapist. His California based company, JM Perry Learning, has been a leading education and performance consulting firm since 1976. As an acclaimed international speaker, Dr. Perry was again rated the #1 speaker at the Wharton Business School's 2000 Securities Industry Institute (University of Pennsylvania). He has been a celebrated 10-time keynote speaker at the National Entrepreneur of the Year Awards sponsored by INC. Magazine, Ernst and Young, Merrill Lynch, USA Today, and CNN. A graduate of the University of the Pacific, Dr. Perry received his doctorate in counseling psychology in 1980. He was also awarded the title of UOP Alumni Fellow in 1986. He is Board Certified by the American Psychotherapy Association.

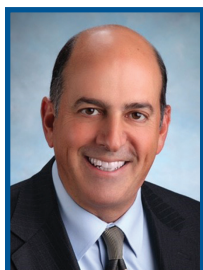


BRIAN YACKER

How to Avoid the Ire of the IRS and AG

Brian Yacker has over 20 years of tax, legal, and accounting experience in the exempt organizations area. Brian's expertise includes public support test calculations and planning, governance best practices, effective Bylaws, EO Governance Check-Ups, proper functional expense allocations, maximizing charity watchdog ratings, federal and state Tax Exemption Applications, unrelated business income revenue stream studies and the proper internal and external reporting of special event fundraisers. Brian earned his Bachelors degree in Finance/Marketing from the University of Virginia and his Juris Doctor from the Indiana University School of Law (Bloomington).

2015 CPS FAMILY LEGACIES & PHILANTHROPY DONOR PANEL



ANTHONY BARKETT

As the youngest child of Dr. Joseph and Marie Barkett, Anthony grew up involved in this community and attended many charity events throughout San Joaquin County. He and his wife Rima continue the traditions they learned from their parents. As a businessman and developer, Anthony also works to help areas like

Downtown Stockton through redevelopment. They are involved both locally and internationally with a variety of organizations primarily focused on education, children and women's empowerment.



RIMA BARKETT

Chef Rima Barkett grew up in Tuscany, Italy, and in her mother's kitchen she learned the love of feeding people. Rima brought those traditions with her to the United States in 1993 when she moved here after marrying Anthony Barkett. In 2006, the Barketts moved with their daughter to Rome to spend a few years working on the World Summit of

Nobel Peace Laureates. She continues to be active in global peace initiatives through her foundation Ambassadors of Peace. Rima's love of cooking and her mother's inspiration has been a main ingredient in the passions she has chosen in her life, including her advocacy for children and those less fortunate.



CINDY BASSO

A native Stocktonian, Cindy Basso served as CFO, then President of Global Healing, an international humanitarian aid organization, from 1994 to 2010. During Cindy's Presidency, Global Healing grew from a one country program to an organization that operated in six countries. She was also the co-founder and president of Peter's Children in St. Petersburg, Russia, dedicated to improving the lives of Russian children in hospitals and orphanages. Prior to joining the nonprofit sector, she was the expatriate tax manager at Ernst & Young in St. Petersburg, Russia and a tax accountant for KPMG Peat Marwick in France. Currently, she lives in California, a practicing trust and estate attorney and serves on the Board of Trustees for the University of San Diego and Play Rugby, USA California Division. Cindy is the daughter of Greg and Noreen Basso.



JOHN LEDBETTER

John Ledbetter started his career as a manager for the Farm Credit System in Fresno. In 1978 he joined his father and brother in the family winegrape business, Vino Farms. During his time operating Vino Farms with his brother, Jim, they went from farming exclusively in Lodi to farming in Sonoma, Napa, San Luis

Obispo, Santa Barbara, Sacramento and Yolo Counties. Today Vino Farms owns or manages over 14,000 acres of grapes. John currently serves as the Chair of the Hutchins Street Square Foundation Board, Chair of the Lodi Community Foundation Board, and Chair of The Committee on Homelessness in Lodi.



KIM LEDBETTER-BRONSON

Kim Ledbetter-Bronson is the first of the third generation to join Vino Farms, LLC and a fourth generation in California farming. Vino Farms sell grapes to about 30 premium California wineries. Kim has served and chaired a number of wine business organizations at various local,

state and national levels. She also has continued the family legacy of community involvement by chairing the Lodi Chamber of Commerce, serving on the board of St. Peter Lutheran School, and teaching Sunday school.



MODERATOR: PETER M. JOHNSON

Peter Johnson will serve as the Moderator for the Family Legacy Philanthropy session. Mr. Johnson is Director of both the Westgate Center for Leadership and Management Development and the Institute for Family Business in the Eberhardt School of Business at the University of the Pacific. He founded the Institute for Family Business in 1997 and has worked in all areas of family business including creating family legacies. Mr. Johnson also has an extensive background (and passion) for helping non-profit organizations. He has worked with many of the leading non-profits in this community as a board member and educator.



NATIONAL PHILANTHROPY DAY AWARDS

The Association of Fundraising Professionals (AFP) California Capital Chapter *San Joaquin Extension* recognizes San Joaquin Valley's individuals and organizations whose philanthropic achievements have made an impact on our society and represents philanthropy at its best.



LODI MEMORIAL HOSPITAL AND FOUNDATION *Outstanding Philanthropic Organization*

In 1946 community members were appointed to draw up articles of incorporation for the Lodi Memorial Hospital Association. The association became the non-profit owner of the hospital and was operated by community members for community members. A quiet fund drive of about 500 residents raised \$65,000 followed by 3,500 donors contributing to the hospital campaign. Lodi Memorial Hospital was opened in 1952. In 1980 the Lodi Memorial Hospital Foundation was formed and has raised significant funds for Lodi Memorial Hospital's capital improvements, new technology, and outreach. The LMH Foundation will continue to support Lodi Health, its facilities and services serving the community for years to come.



DIANNE AND GENE GINI *Outstanding Philanthropists*

Native Stocktonians Dianne and Gene Gini epitomize the spirit of philanthropy - generously giving to so many charitable organizations through their company, Collins Electric, and from their personal assets, it's impossible to count. The one local organization that has probably benefitted the most from the dedication of the Ginis is the local chapter of Mothers Against Drunk Drivers. After losing their only daughter, Lisa, to a drunk driver, Dianne turned her grief into action by helping to found the local MADD Chapter. It is with a giving heart the Ginis work every day to make Stockton and San Joaquin County a better community for all. They lead by example, encouraging and inviting others to give and serve.

KIDS TAKING A STAND *Outstanding Young Philanthropists*

Talk about inspirational leadership! On October 14, 2007, eleven-year-old young entrepreneur Sydney Seligman decided to host a lemonade stand with her neighborhood friends, Gavin (4) and Mason Merin (6). Over the course of several hours the kids collected \$109 for their efforts. Sisters Haley and Lexey Seligman, friends Natalie and Brooke Davis and several other neighbors joined the effort. To date they have raised over \$115,000 for breast cancer services and volunteer at local events centered on breast health. What is so special about these youngsters is that they have embraced the values of philanthropy. Kids Taking a Stand is an example to all of us of the true "Giving Spirit."



THANK YOU TO THE NATIONAL PHILANTHROPY AWARDS COMMITTEE

Diane Vigil, CFRE, Chairperson

Georgette Hunefeld

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