

KIWANIS CLUB  
OF ANN ARBOR

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# Kiwaniis®

## Kiwaniis Club of Ann Arbor

Volume 5, Issue 11

December 16, 2013

### Today's Program...



President:  
John Dahl

Vice-President:  
John Goff

Treasurer:  
Cliff Sheldon

Secretary:  
Jeanette Okuley

Immed. Past Pres.  
Mark Wishka

Board Members:  
Gordon Beeman  
Alan Burg  
Dan Burroughs  
Alan Caldwell  
Andrea Kotch Duda  
Robert Johnson  
Martha Petroski  
Gretchen Preston  
Sheridan Springer  
John Schenk

**Jim Meretta** introduced our program and members who were presenting: **Cliff Sheldon, Larry French** and **Tom Dew**.

**Cliff Sheldon**, as Treasurer provided his "**Cliff Notes**" on financial status of the club.

There are two separate entities: **The Club**, formed for the benefit of the Members and **The Foundation**, formed for the benefit of the Community. Each has a separate budget and accounting

**The Club** has a budget of \$37,000 of which 2/3 come from Dues. The balance comes from Happy Dollars, Fines and Social Activities. **The Club** has reserves of \$48,000. The projected deficit of \$7,700 this administrative year, will be drawn from reserves.

**The Foundation** has the **Thrift Sale** which is budgeted to generate ~\$445,000 in sales, \$226,000 in expenses and a net revenue of \$219,000. In addition there are other sources of income to **The Foundation**: Eliminate, The Mott Pott, Grocery Cards, The Cross Foundation are many. Total cash dollars expected to distribute to the community this year: \$250,000, plus \$30,000 in Vouchers (non-cash/merchandise) for **a total of \$280,000!**

For the past several years of surplus has existed and those dollars have accumulated. This year that surplus will be spent, ~\$93,000.

**The Foundation** has ~\$715,000 in Reserves, the majority of which is managed by the Investment Oversight Committee.

**Larry French**, as Chair of the Investment Oversight Committee presented an overview of the goal of the **Foundation Reserves** and touched on what this fund has provided and performance of the investments, since the 1989 inception.

\$200,000 is the minimum balance to maintain in this account. The rationale: Should a catastrophic event prevent the **Thrift Sale** from operation, **The Foundation** can continue to provide funds to the community.

Continued next page.....

### Next Week's Program...

**Lynne Lande** and the Membership Committee. It should prove to be a fun meeting!

Continued from page 1

The investment performance from 1989 to November of 2013 almost equaled the return of the S&P 500 Index during that period, while taking half the risk!

Recently ~\$280,000 was shifted to cash. This positioned the portfolio for the possibility of a building down payment in the near term, as well as to capture gains from a recent strongly performing stock market.

In 2012 an **Endowment** was formed. In an **Endowment** only interest and dividends can be used to provide gifts to the community. The principal cannot be touched. So far this year \$11,000 has been added to the **Endowment**, which were memorial donations gifted in the name of recently passed members.

#### **Tom Dew reviewed Estate and Gift Planning**

**Estate planning** is essentially organizing assets and developing a plan to pass them on as efficiently as possible, after you're gone.

The key documents everyone should have at a *minimum* are: Medical Treatment Power of Attorney/Advance Directive, Durable Power of Attorney (for Finances) and a Will. The goal is to simplify how you may pass assets along.

At death, all assets pass in one of Three Ways: 1). By Operation of Law: Such as jointly held assets, which pass to the survivor. 2). By Contract: Such as life insurance, annuities and trusts which pass to the designated beneficiary. 3). Probate: A legal process.

**Gift Planning and Charitable Gift Tips:** 1). You may gift highly appreciated securities to a Charity and receive full credit for current value of the securities. 2). For those over 70 1/2, you may gift up to \$100,000 directly from your IRA until the end of 2013 (potentially an advantageous tax strategy). 3). You may charge a Charitable Gift to a credit card, take the deduction as of the date of the charge and pay the card off the following year.

**Induction of New Members:** **Kathy Barden-Perlberg** inducted two new members! Sponsors **Ron Gardner** and **Dave Hughes** introduced (respectively): **Deb Jones** and **Ted Brokaw**. They were welcomed into the club with the customary immediate fine!

See pictures on page 6.....



This is what we call HOME...  
now in our 93rd year.



### *The Kiwanis Thrift Sale*

- Since 1927
- Over \$3.5 Million  
in Community  
Service Funding
- Thousands of Lives  
Touched



### ASSIGNMENTS for the COMING WEEK:

**Announcer**  
**Officer of Day**  
**Dockers**  
**Warehouse**  
**Dever**  
**Sorters**  
**Hardware**  
**Furniture**  
**Shoes & Sports**  
**Men's Clothing**  
**Electronics**  
**Lamps**  
**Antiques**  
**Beds & Toys**  
**Office & Medical**  
**Vouchers**

**Invocation**  
**Greeters**  
**Hospitality**  
**Cashier**

**Dale Leslie**  
**Burt Lamkin**  
**WE NEED DOCKERS!**  
**Martha Petroski, Don Clewell, Larry French and Nick**  
  
**Alan Burg and Ken Hillenburg**  
**Jerry Brown, Dan Dever and John Sampsel**  
**Mel Williams, Cliff Sheldon, Jim Kane and Jerry McMahon**  
**Dave Drake and Amy Rolfes**  
**John Basset and Jim Couch**  
**Bill Robb and Team**  
**Rob Shultz and Denis Powers**  
**Betsey and Alexis Ford**  
**Lee Bachman and Gretchen Preston's trade replacement?**  
**Jim Mattson and Gang**  
**Molly Kelly, Jim Wheaton, Bob Johnson, Don Clewell,**  
**Bob Carr, Dot Cattell, Dale Leslie, Joan Masters**  
**Lynne Lande**  
**Jerry Brown, Jim Couch, Clair Dahl, Molly Kelly**  
**Peter Schork**  
**Martha Petroski**

### **Guests at our Club...**

**Jim Couch** introduced Zack Gizicki, Amanda Bassett, Josh Krutz, all of Circle K and Fred Miller

### **Announcements...**

A big Thank You to Westside Methodist Church for allow us to meet there during our first two meeting in December! We provided a \$250 donation.

**Jim Carey:** For the Mott Hospital Gift Wrap taking place December 17<sup>th</sup> and 18<sup>th</sup>. He expressed his thanks for those scheduled to help.

We need Bell Ringers for the Salvation Army on December 21<sup>st</sup>.

January 18<sup>th</sup> is the 99<sup>th</sup> Birthday of the Detroit #1 Club. The celebration is Dinner at the Detroit Yacht Club! \$49

The Annual Tip collection for the Caterer's took place today. If you forgot to bring your check or cash today, please bring it next week. Make checks out to **B&G Catering**.

**Presentations:** **Jane Talcott** welcomed our treasured volunteers to our meeting. She provided the definition of Volunteer and the definition of Indispensable. Our volunteers are Indispensable to our Thrift Sale! Jane then introduced our four Honored Volunteers for 2013/2014: Glen Gates, Ralph Maten, Kathie Wilder and Alonzo Young.

## Fines and Happy Dollars...

**Fines:** It was proposed to **Kathy Barden-Perlberg** to fine all members who have not sponsored a new member in the 2013/2014 administrative year. It passed.

**Happy Dollars:** **Max Ziegler:** \$20 happy dollars for the Raiders (not the Pro Football team, the team his grandson are on!), the help provided during the Christmas Sale and the Holiday Party in preparing the food (including those from Circle K) as well as the donors of these events: **Doug Ziesemer** and Travis Point, Don Knight of Knights, Frazier's Pub and Jim Smith from Washtenaw Dairy. **President John Dahl:** For the wins by the Wisconsin Badgers and Green Bay Packers. **Larry French:** \$20 the upcoming Bowl Game of the University of Michigan and Kansas State. **John Bassett:** \$10 for getting the Member Digest out and for all the help in making it happen. \$50 for his daughter moving out of the house, \$1 for every year! **Garry Donner** for the adventure of blown up snow thrower in Canton, a "Crazy Gift Exchange" in Coldwater which netted him a stash soda and toilet paper he didn't need, to the pickup of new (used) snow thrower from his father-in-law in Dexter (for the right price), and somehow bringing all home to Canton! **Dick Smit:** Great time working in Men's clothing and having John Bassett show him how to return to the department with bags. **Chris Winkler:** For Max Ziegler and his hard work on the Social Committee. There are 8 members and he claim's Max does ¾ of the work. He suggests joining the Social Committee for those who want a cushy assignment. **Joe Medrano:** \$5. \$4 for the 4 problems his step daughter resolved and \$1 for himself, for successfully folding a fitted sheet!.

## Hospitality Information...

Peter Schork reported R.J. Taylor is in St. Joe's Hospital for the removal of his big toe. He is in room 205 and would like calls and visits.

Jerry Brown let us know his son Randy continues to battle cancer. Dialysis is needed three days a week and he will be undergoing another surgery for a recently discovered tumor. Thoughts and Prayers are appreciated.

## Stuff You Should Know...

Interclubs: Dave Drake announced the Ypsilanti Club will be providing an award for the late Charlie Anderson at their meeting on Wednesday at Noon in the EMU Student Center.

**Fines Collected: \$26.34**

**Happy \$ Collected: \$109**

**Attendance Today: 85**

**Last Week's Sale Revenue Sale total: \$6,214**

**KAC: \$5,276**

**Warehouse: \$938**

**Vouchers: \$2,455 YTD Vouchers: \$13,504 or 45% of this year's allotment.**



Known world wide as  
the place for the  
"funkiest" gift.

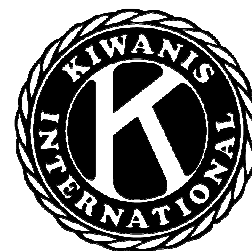
*"Serving the  
Children of the  
World... our  
motto, our  
mission"*



The Warehouse Sale is  
now open 10am-1pm  
every Saturday!

## December 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 Meeting Westside Methodist	3	4	5	6 Chrri- stmas Sale	7 Sale + Warehouse
8	9 Meeting Westside Methodist	10	11	12	13 Christ- mas Social	14 Sale + Warehouse
15	16 Meeting	17	18	19	20	21 Sale + Warehouse
22	23 Meeting	24	25 Christ- mas Day	26	27	28 CLOSED
29	30 <b>NO Meeting</b>	31				



### Planning Calendar

March  
Spring Divisional

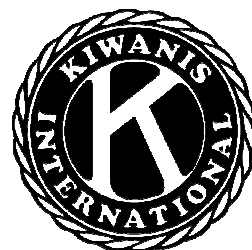
May  
Club Annual Meeting  
Elections  
Attendance Awards

June/July  
International Conven-  
tion  
Club Family Picnic

August  
District Convention

September  
Installation of Officers  
& Directors  
Legion of Honor  
Awards

December  
Christmas Sale  
Salvation Army Bell  
Ringing  
Club Christmas Party



## January 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4 Sale + Warehouse
5	6 Meeting	7 Board Meeting	8	9	10	11 Sale + Warehouse
12	13 Meeting	14	15	16	17	18 Sale + Warehouse
19	20 Meeting	21	22	23	24	25 Sale + Warehouse
26	27 Meeting and Set Up	28	29	30	31	



## Other News...



Our club has a long history of helping children at UM Hospital. In this 1938 photo, Kiwanian Ashley Clague--for whom Clague School is named--visits the hospital in connection with the Kiwanis Newspaper Sale Fundraiser. This year C.S. Mott Children's Hospital has invited our club to participate in gift wrapping presents for children who will be spending the holidays at the Hospital. It will take place Tuesday December 17th and Wednesday December 18th. There are three shifts: 9:00AM-Noon, 10:00AM to 2:00PM and 2:00PM-4:00PM. Contact Jim Carey to participate.

Honored Vounteers: Ralph Maten,  
And Alonzo Young, presented by Jane Talcott.  
Not Pictured: Glen Gates and Kathy Wilder

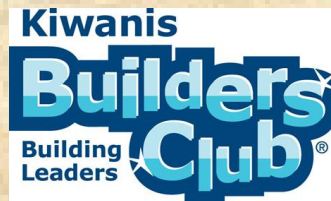


New Members Introduced by their Sponsors:  
Deborah Jones and Ted Brokaw

## Our Sponsored Programs... Service to Youth:



Angell Elementary



We need to start one of these  
for middle schoolers!



WISD Aktion Club



Huron High School  
Pioneer High School



University of Michigan Circle K

**ELIMINATE**  
Kiwanis eliminating maternal/neonatal tetanus

Make a contribution today. [Contact Past President Ron Gardner](#) for information on how to help out.

**KIWANIS CLUB OF  
ANN ARBOR**

**Meetings:**

Mondays at Noon  
200 S. First Street  
Ann Arbor, MI 48104

[www.a2kiwanis.org](http://www.a2kiwanis.org)

Building Phone:

734-665-2211

Thrift Sale Voice:

734-665-0450

**"Ann Arbor Kiwanis Thrift  
Sale" is on the Web at:**

[www.kiwanissale.com](http://www.kiwanissale.com)

and



**Other Links:**

- [Michigan District Kiwanis](#)
- [Kiwanis International](#)
- [U of M Circle K](#)  
Meets 7pm Thursdays at UM  
Union or League (Check Calen-  
dar on Website)
- [Kiwanis Club of Ypsilanti](#)  
Meets Noon Wednesdays at  
EMU Student Center
- Ann Arbor Western  
Meets Noon Tuesdays at  
Quarter Bistro
- Kiwanis of Ann Arbor -  
Morning Edition  
Meets 8:30am Wednesdays at

*"Serving the Children of the World"*



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