

SPRING 2017

Envision

ELEVATING PHILANTHROPY IN THE SAN GABRIEL VALLEY



Gratitude for Life-saving Care Prompts Generosity

Successful Real Estate
Investor Makes Tax-wise Gift

GRATITUDE / CONT'D. ON P4



Left to right: Charlene Rasmussen, Donna Owens and Carolyn Marques

MOMENTS + MILESTONES

These are the Moments + Milestones that are a part of the Citrus Valley Health Foundation. They may represent progress along the way, mark a significant development or worthy accomplishment, or offer a glimpse of the goodwill of the people in the San Gabriel Valley.

\$157k +
Gift shops
2016

\$1M +
Largest gift
from supporting
organization

SHOPPING BRINGS SWEET SUCCESS Big-hearted Auxilians are Big Donors

Need a gift for your newborn grandchild? Or a birthday card for your best friend? How about a box of chocolates for your Valentine? You won't have to travel far to find the perfect gift—just head to one of the three Citrus Valley Health Partners' auxiliary-run gift shops. You'll discover you are not just shopping, you're supporting the hospitals and giving back to your community. In 2016, the three hospital-based gift shops, plus the Bargain Box thrift store in Covina, secured more than \$157,000 in total proceeds.

The Gift Box and the Bargain Box, both successful shops managed by the Auxiliary of Inter-Community Hospital, help boost the auxiliary to be the largest donor to the hospital with cumulative giving surpassing \$1 million. Tiffany Ramirez, corporate director of volunteer services for CVHP, credits the strong partnership between the volunteers and the hospital staff for part of this success. "The staff makes thrift shop donations at a convenient location at the hospital and also visits the Bargain Box to shop. Their continual

support is encouraging."

The Queen of the Valley Auxiliary directs the Queen's Shop at the hospital and has a history of devoting its proceeds to specific projects as the need arises throughout the hospital. They pledged significant support for the Giraffe OmniBeds® for the Neonatal Intensive Care Unit and, in 2016, committed to a pledge of \$20,000.

All three gift shops carry See's Candies—their most popular gift! At The Lobby Shop, administered by the Auxiliary of Foothill Presbyterian Hospital, the See's Candies proceeds go to a scholarship fund for hospital staff and others in the community seeking to further their education, often working toward their bachelor's or master's degree in a healthcare-related field.

The ancient Greek philosopher Aristotle suggested the essence of life was to serve others and to do good. It seems the hospital auxiliary volunteers of Citrus Valley Health Partners have mastered that indispensable quality. ■

“The CVHP mission, to help people keep well in body, mind and spirit by providing quality healthcare services in a safe, compassionate environment, really is at the heart of everything we do.”

– MICHELLE STODDARD

Dear Friends,

It seems change is something we can always count on, and so it is at Citrus Valley Health Foundation. After three years as chief executive officer, Joseph Zanetta retired from his position on March 1. Joe's vision to elevate philanthropy made a big difference for Citrus Valley Health Partners, and he will surely be missed. Thank you, Joe.

Now, as I enter the role of chief executive officer, I have the opportunity to reflect on the past year and a half since arriving at the foundation. I am awestruck by the commitment of the remarkable community of physicians, nurses and staff, auxiliary members and volunteers, trustees and donor friends. Patients and their families are the reason we are all here, and they inspire our commitment to the mission every day.

The CVHP mission, to help people keep well in body, mind and spirit by providing quality healthcare services in a safe, compassionate environment, really is at the heart of everything we do. It is reflected in the day-to-day service provided to our patients. Even more inspiring is the service of the volunteers who give thousands of hours of their time every year. You can find them throughout the hospitals and hospice, in the boardrooms and in event-planning meetings. They are

involved in nearly every aspect of daily life at Citrus Valley Health Partners.

We really do have a community of individuals committed to providing quality healthcare in the San Gabriel Valley!

In the midst of change, the role of the Citrus Valley Health Foundation takes on an even greater importance. Philanthropy will have a major impact on how proactive we can be to meet the growing needs in providing the very best in healthcare. A goal of the foundation is to match the philanthropic interests of its friends and supporters with the needs of each hospital and the hospice. It is my intention to utilize the collective talent and expertise of the staff, CVHP Board of Directors and CVHF Board of Trustees to match your charitable interest to these critical needs.

You may be asking what you can do to support your local hospital and hospice. Throughout the rest of the year, you'll be hearing from us about ways to give that will benefit important projects. There are several non-cash, tax-wise ways to fulfill needs for Citrus Valley Health Partners and for you. My vision for the foundation is to prepare for the future *now*. I look forward to meeting with many of you to discover your passion for CVHP and its role as the best healthcare provider for you, your family and the community.

So many of you have already made generous gifts benefiting those who need care. We look forward to continuing our relationship with you and to the many new friends in our community. Thank you!

Sincerely,



Michelle Stoddard
Chief Executive Officer



I AM AWESTRUCK

As I enter the role of chief executive officer, I have the opportunity to reflect on the past year and a half since arriving at the foundation. I am awestruck by the commitment of the remarkable community of physicians, nurses and staff, auxiliary members and volunteers, trustees and donor friends.

“How can we enhance and secure our financial future, and, at the same time, leave a legacy to Queen of the Valley Hospital?”

– GEORGE AND DONNA

Successful Real Estate Investor Makes Tax-wise Gift

Gratitude for Life-saving Care Prompts Generosity



As a real estate investor, George had a knack for success. He traded in real estate and gradually developed his career as a successful real estate investor, eventually holding a sizable portfolio of rental properties. After 40 years of building his business, and in his late seventies, George realized he needed to start planning for retirement. What would his exit strategy be?

At the heart of it, George and his wife, Donna, wanted to make sure each of them would be provided for financially should the

other partner pass on. George began considering exit strategy options, especially those alternatives that use current tax law to avoid long-term capital gains. His focus narrowed to the transfer of assets to a charity in exchange for a guaranteed life annuity, the charitable gift annuity (CGA). He made a call to the Citrus Valley Health Foundation. His

question: How can we enhance and secure our financial future, and, at the same time, leave a legacy to Queen of the Valley Hospital?

Why the hospital? George and Donna wanted a tangible way to express their deep gratitude to the medical and nursing staff at Queen of the Valley Hospital for saving George's life more than 20 years ago. In addition, making a gift to the hospital was George's way of giving back to the community for the success it had given him. Contacting Citrus Valley Health Foundation about meeting their financial goals and supporting the hospital just made sense.

FINANCIAL PEACE OF MIND

SMART CHARITABLE PLANNING

George and Donna soon discovered how a CGA funded with real estate could greatly benefit the hospital and meet their desire for a safe and secure guaranteed payment stream. Utilizing the right planned giving instrument allowed them to accomplish their objective and make a bigger gift than they thought possible using appreciated real estate while being tax-wise and safe.

WHAT ARE THE DETAILS?

To establish the CGA, George and Donna made a permanent gift of real estate to the Citrus Valley Health Foundation. In return, the foundation agreed to make periodic payments (an "annuity") to George and Donna for the rest of their lives. The annuity payments are guaranteed and stable regardless of changes in the economy.

In addition to the financial peace of mind, the gift provides attractive tax savings. The couple received a charitable income tax deduction for the gift portion of the CGA. The regular annuity payments are partially income tax-free for many years. Using appreciated real estate to fund the CGA, George and Donna receive the annuity payments based on the full market value of the real estate. There will be no long-term capital gain tax reducing the value of George and Donna's annuity.

George spent 40 years building his business and was looking for a way to be charitable in exchange for a safe, tax-advantaged payment stream. George implemented his exit strategy. Let Citrus Valley Health Foundation help you find yours. ■



GIFTS THAT PAY: THE CHARITABLE GIFT ANNUITY

To create a charitable gift annuity (CGA), the donor makes a permanent gift of cash, securities or real estate to Citrus Valley Health Partners. In return, Citrus Valley Health Partners agrees to make stable, periodic payments (an annuity) to one or two people (annuitants) for their lifetimes. When the annuitants have passed away and the annuity ends, Citrus Valley Health Partners uses the remaining funds to support its mission.

WHAT ARE THE BENEFITS?

- The donor can turn cash, securities or real estate into a guaranteed stream of payments for one or two people for the rest of their lives.
- The annuity payments are stable regardless of changes in the economy.
- The donor receives a charitable income-tax deduction for the gift portion of the CGA.
- If the donor uses appreciated property to fund the CGA, the donor can avoid the capital gains tax on the exchange that funds the CGA.
- Annuity payments are partially income-tax free, often for many years.
- When one annuitant passes away, the other annuitant will continue to receive the same annuity amount.
- CGA rates depend on the annuitant's age.
- CGA programs are regulated by law and are guaranteed.
- CGAs are flexible and can be planned to meet the donor's needs. Payments can begin immediately or be deferred until retirement, for a higher rate.

To learn more about charitable gifts that pay income, please contact Michelle Stoddard at (626) 814-2421.

Empty Pockets: The First Geleris Act of Philanthropy

While Paul Geleris gave away quite a bit of money in his life, his sons Andrew and Joseph say the gift that impresses them the most was the first, and the smallest. As Paul left Italy in 1949 to come to America, he literally emptied his pockets containing all the money he had, \$800, and gave it to his two best friends, Bill and Jack, in case they needed it over the next few years.

Notable Lives, Notable Philanthropy: Paul & Marilyn Geleris

Generosity Truly Makes a Difference



Andrew Geleris, MD, and Marilyn Geleris

A POST-WORLD WAR II LOVE STORY

April 4, 1951. A smorgasbord supper at \$2 a plate, followed by a walk around the city—the first date for Paul and Marilyn Geleris. They met on Roosevelt Island in New York City where Marilyn was a nurse working the evening shift in the operating room suite at Metropolitan Hospital. Paul, born in Lithuania and medically trained at the University of Turin, Italy, had immigrated to the U.S. as a pathology intern earning \$100 a month. They waited 13 long days for their first date, until Marilyn had a work-free evening. Patience paid off as they married that same year.

By January 1957, Paul and Marilyn were living with their two young sons, Andrew and Joseph, in Glendora, California: population 10,000! Dr. Geleris was a clinical pathologist and established the region's first

COMMITTED TO SUPPORTING OTHERS

Named by L.A. County as the Philanthropist of the Year in 2001, Paul demonstrated a notable commitment to humanitarian efforts promoting education and healthcare advances throughout the community. He served as a trustee on the Citrus Valley Health Foundation Board and, along with Marilyn, helped to found the Geleris Cancer Center at Queen of the Valley Hospital.

medical laboratory. His success, coupled with a growing need, led to the development of a network of 11 labs with 200 employees and two pathology associates in the East San Gabriel Valley and Pomona.

GELERIS FAMILY FOUNDATION EDUCATION CENTER

Now, Marilyn continues the family's nearly 35-year tradition of philanthropy and significant support of Citrus Valley Health Partners (Paul passed away in 2005). The newly named Geleris Family Foundation Education Center, housed on the campus of Foothill Presbyterian Hospital, reflects Paul and Marilyn's gratitude and commitment to their local community. The enhanced education center incorporates the newest developments and up-to-date technology for training physicians, nurses and staff, as well as serving as a meeting center for the community.

With five meeting rooms—the largest can accommodate up to 75 people—this new space is both comfortable and technologically savvy. The added capacity for multimedia, teleconferencing and distance learning leads to more effective education, training and collaboration. Melissa Howard, RN, chief nurse executive for Foothill Presbyterian and Inter-Community hospitals, is grateful to the Geleris family and excited about the opportunities the center provides for local residents: "A man having knee surgery and needing preoperative education could be at the new center in Glendora remotely watching the actual class taking place in West Covina without needing to drive. He would still have the ability to ask questions and seamlessly interact with the presenter and all attendees."

A LEGACY FOR GOOD

The Geleris family continues to expand both in number and in generosity. "I feel blessed," said Marilyn, "to have the two most wonderful sons, seven grandchildren and three great-grandchildren. They all know I'm committed to supporting others through the family foundation in perpetuity." ■



A Sons' Tribute by Andrew Geleris, MD, and Joseph Geleris, DDS

For most of her life our mother was a supportive wife and mom, typical of her generation. She spent a lot of time encouraging and caring for the two of us, chauffeuring us to activities and helping us when we needed it. In our father's last few years he became quite frail physically and developed some cognitive problems. We have always admired how faithful our mother was in devoting her life to his care during those years.

After we left home and before dad's decline, mom began to blossom. She took classes at our local college studying history, geology, music, photography and more. She worked as a docent for many years at The Huntington Library

in San Marino. She began exercising regularly, and we can say with great confidence that she is probably one of the most fit 89-year-olds in this country. She gardens, keeps her home immaculate and remains extremely active. Occasionally she feels a little tired; she simply can't conceive of how this could be.

Dad grew up in Lithuania. Life was complicated in that country in the 1920s, and his father had to leave home when our dad was just 18 months old. So dad, who had no siblings, was raised by his mother and her brother. They devoted their whole lives to raising and encouraging him to achieve all that he could. It was our dad's mother, a brilliant

and self-educated woman, who was the most important formative influence in his life. He was very smart, skipping three grades in school and entering medical school at age 16. World War II broke out after dad had completed one year of medical school. The German advance into Lithuania cut dad off from his mother and uncle, neither of whom he ever saw again.

We can confidently say that while there may be parents who loved their children as much as our parents did, there are none who loved them more. Together they created a wonderful family life for their children, despite the fact that neither one of them grew up in an ideal family environment. ■



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If you wish to have your name removed from the list of those receiving communications in support of Citrus Valley Health Foundation, please call or write to the address above.

The Last Page

We hope your confidence and pride in the excellent healthcare provided by Citrus Valley Health Partners hospitals and hospice inspire you to participate in our upcoming events. Join us for our Golf Invitational or our Autumn Nocturne Gala—or both! Buy a table for friends or a ticket for yourself. Be a sponsor, advertiser or auction donor. Proceeds benefit the Inter-Community, Queen of the Valley and Foothill Presbyterian hospitals, and Citrus Valley Hospice.

For ticket purchase and sponsorship opportunities for all events, please contact the Foundation at (626) 814-2421.

NOV 18 **SAVE THE DATE!**
Autumn Nocturne, 28th Annual Black Tie Gala
Saturday, November 18, 2017

Join your friends at the Langham Huntington in Pasadena! Dress in your best “black & white” for an unforgettable evening of elegance and fun at Citrus Valley Health Foundation’s Autumn Nocturne. Enjoy cocktails and dinner, silent and live auctions, plus dancing and entertainment. The program includes the presentation of the 2017 Physician of the Year awards.

Under the leadership of Pauline Bereuter and K. Vasantha Reddy, the event volunteer committee includes: Mary Jane Bettfreund, Gina Breaux, Lorena Choctaw, Jeanne Christensen, Xochitl Flores, Lisa Fuerst, Janet Hanson, Patricia Serio, Susan Shapiro and Jason Veazey. ■



LIGHT UP A LIFE Tree Lighting and Remembrance

Thursday, December 7, 2017
Starts at 5:30 pm
Citrus Valley Hospice, West Covina

COMMUNITY SPONSORED EVENTS

**7th Annual
Dare to Care Cut-a-thon**
Saturday, August 12, 2017
9:00 am – 2:00 pm
Heritage Plaza Park, Covina
Benefiting Citrus Valley Hospice

**8th Annual
Shelley Houghton
Memorial Walk-a-thon**
Saturday, October 7, 2017
Registration 9:00 am
Walk 10:00 am
Covina Park, Covina
*Benefiting Chronic Obstructive
Pulmonary Disease (COPD)*

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