

# The Weekly Westerner

Box 4572, Station C, Calgary, Alberta T2T 5N3  
Grey Eagle Hotel, 3777 Grey Eagle Drive (Corner of 37 St SW and Glenmore Drive)  
Mondays 12.10 pm - 1.30 pm

**President:** Bill Fitzsimmons **President-Elect:** Marlene Doherty **Past President:** Gerry Meek  
**Secretary:** Gail Williams **Treasurer:** Don Edie  
**Directors:** Judy Cochran, Gord Cox, Darren Grierson, Barb Hames,  
Ken Montgomery, Drew Turnbull

## **Together We Are People of Action - Building Community**

November 9, 2020 Edition: 54.16 Reporter: Marie Rickard Editor: David Williams

**President Bill Fitzsimmons** welcomed all Rotarians and guests to the meeting today.

To start the online meeting **Don Edie** offered an Inspirational Moment and here it is:  
"Life is 10 percent what happens to me and 90 percent of how I react to it." -- Charles Swindoll

### Announcements

- Gifts for Bethany – Bill Quinney – instead of stockings which were too labor-intensive for the staff at Bethany, Bill is requesting donations to provide poinsettias and treats as gifts for each resident at the Bethany Care Residence that we supported in the past. He requires about \$400 more to complete the donation promised. Please send them in this week so the order can be completed. See Bill's email for payment details.
- Doorway – Bill Quinney - Casino help is required. Bill can direct you to whom you can contact to volunteer.
- Rotary Remembers – Robyn Braley A multi-media event at 10:30 am on Wednesday, November 11. Visit the email invite to register for this online event. The speaker will be **Dr. Stephane Guevremont**, a military historian who will be giving a presentation on The Liberation of the Netherlands. Donations in support of the veterans will be received when you register.
- Robyn also announced that the speaker on November 23 will be **Doug Mitchell**, a board member for the Calgary Stampeders, who will talk about the future of the Canadian Football League and other relevant football topics. Another great meeting, not to be missed.
- Winter Comfort Packs. **Pat Fitzsimmons** presented a new fundraiser package to take away the blues during COVID and an excellent Christmas present idea. Buy a package or break it apart to use as individual gifts. Combine it with other items or just buy it for your own household. Delivery is \$7.00 if under \$38 value and delivery is free for purchases above \$38. The packages include puzzles and mugs (indigenous art), coffee

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(Caffe Monte) and chocolate (Peace by Chocolate), or any combination of that. Only on sale until November 18. Go to [www.rotarywestfundraising.ca](http://www.rotarywestfundraising.ca) to purchase.

- Wreaths and Poinsettias **Barb Hames** announced that the deadline for poinsettia orders is today and the wreath and centrepiece order deadline is this week. Again, go to [www.rotarywestfundraising.ca](http://www.rotarywestfundraising.ca) Pick up will be at the Grey Eagle Hotel.
- Haircut for Honduras Project **Duncan Stanners**. In memory of his late wife, **Jan**, who passed away from cancer and for the Honduran who implemented so many water projects, **Arnoldo Alvarez**, who has just passed due to cancer, Duncan is requesting donations to go toward the water project in Honduras. The hair collected will be donated for a wig for cancer victims. Please send your donations as per Duncan's email request.
- **Marlene Doherty** is on the search for a president -elect-nominee and two board members. If you are interested, please contact Marlene. Thanks to all who completed the last survey. There will be another survey on Club Service next week.

### Guest Speaker

**Garfield Ganong** introduced our guest speaker.

**Phil Levson** is a native of Calgary. He and his wife, **Sherry**, have five adult children with the first grandchild now three months old! Phil has a master's degree in social work from the University of Calgary. He has worked in the non-profit sector for over 23 years. Phil has also owned a few local Calgary businesses.

Phil is currently the president and principal of the Non-Profit Management Group consulting to a number of charities, locally and nationally. He is past chair of the Canadian Association of Gift Planners for Southern Alberta. He was one of the founding directors for Leave A Legacy Calgary. He has been an active volunteer with various non-profits and most recently as the president of the Inglewood Community Association.

Phil's presentation was on **Planned Giving – Leaving Your Legacy for the Future**. He had a well-prepared slide show which I would encourage you to see on the recording distributed by **Gord Cox**.

Planned giving reduces taxes, reduces probate and estate costs, directs money to your favorite charities, and can be an immediate or deferred gift. Phil tells us what may motivate us, including supporting a cause, making a meaningful contribution, repaying for benefits received, ensuring long-term survival perhaps of your favorite charity, commemorating a life, and creating a legacy. Best of all is it just feels good to give!

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He suggests the donor needs to explore his/her values to find the right cause to support. What is your donor vision? There is a move toward donor-centric gifting, donor stewardship, an informed knowledgeable donor and recognition. He states you always take care of family first. If you sell a business, there could be a tax liability. Stocks, real estate, and retirement plans can generate potential gifts.

Major legislative changes in 1997 through the federal budget increased donation limits to 75% of net income. The limit at death increased to 100%. All planned gifts can have positive tax implications. As of 2006, there is no capital gains on charitable gifts of securities. The Alberta government is the best geographic area for gift giving because 50% of our gifting is returned to income on charitable receipts after the first \$250. Please refer to the table in the slide presentation for an example of stock gifts versus cash gifts.

Making a charitable bequest can be suggested in several ways, but Phil suggests that a percentage bequest is the easiest way to identify and manage. He suggests using “tailored to fit” solutions and, if you plan to name a charity in your will, to discuss this with family, so they know your wishes.

**David Watson** thanked Phil for his talk.

Since COVID is on the rise in our city, President Bill wanted to know who would attend an in-person meeting at the Grey Eagle in November. **Tim Anderson** also has a scheduled evening meeting at the Joyce. An online poll of members who would and would not attend in-person meetings in November and December 4 was conducted: yes 32% and no 68%. Bill will let everyone know what the board decides.

### Coming Events

November: Foundation Month	
2	LCS Presentation of Grants and Projects
9	Phil Levson – Wills -Estates and Rotary Foundation
16	Honduras Water, Haircut Fundraiser, Never Too Late Presentation of Award, Other Service Related
23	Former CFL Commissioner and Current Board Member, Doug Mitchell – Future of the CFL
26	<b>Evening Hybrid Meeting at Joyce on 4<sup>th</sup></b> – Peter Boyle, Valour Canada. WW1 thru eyes of 5 soldiers
30	Ken Keeler – GM Calgary Co-op / Days of Giving / Board Election
December: Disease Treatment and Prevention Month	
7	Brian Lee: Healthcare Canada and USA
14	ISC Presentation of Grants and Projects Vote.
21	Rotary International - President Jennifer Jones – The FIRST Canadian as President of RI.

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28	No Meeting – Christmas and New Year Holiday
	<b>2021 – IT'S A BRAND NEW YEAR!</b>
	<b>January: Vocation Service Month</b>
4	VSC
11	Review of Scholarships and Initiatives
18	LCS
25	Hands on Service Opportunities
28	<b>Evening Meeting:</b> Past Presidents #3
	<b>February: World Understanding Month</b>
1	Membership, Initiatives and Recommendations
8	TBD
15	<b>No Meeting. Family Day</b>
18	<b>Evening Meeting. TBD</b>
22	TBD
	<b>March: Literacy Month</b>
1	ISC
8	Presentation and Proposals for DDF: Pre-approvals
15	LCS
22	Review and Updates: New Proposals
25	<b>Evening Meeting. TBD</b>
29	TBD
	<b>April: Maternal and Child Care Month</b>
5	<b>No Meeting. Easter Monday</b>
8	<b>Evening Meeting.</b> Possible Spring Assembly
12	TBD
19	Projects
26	Developing Projects and Discussion
	<b>May: Youth Service Month</b>
3	ISC: Project Reviews and Updates
10	TBD
17	<b>TBD</b>
24	TBD
27	<b>Evening Meeting. TBD</b>
31	TBD
	<b>June: Rotary Fellowship Month</b>
7	Youth
14	RYLA and YEX
21	Gavel Handover
24	<b>President Evening</b> celebrating Bill Fitzsimmons' Rotary Year – Date timing tentative
28	TBD
	<b>July Stampede and Okanagan Cherries Month</b>
5	TBD
12	TBD



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19	TBD
26	TBD