Planned Giving Committee Standing Rules

Purpose
Provide leadership and organization to a planned giving program for the Napa Valley College Foundation that will ultimately result in increased donations and bequests.

Membership
The Planned Giving Committee will be comprised of a minimum of five members.

The committee shall establish a regular meeting date at least quarterly.

A quorum is at least three members present at a duly noticed meeting.

A Chair and a Vice Chair will chair the committee. The Chair will serve for a two-year term. In the absence of the Chair, the Vice-Chair will serve as Chair. The incoming Planned Giving Chair will choose the Vice Chair.

Functions/Deliverables
1. Identify and promote estate-planning vehicles.

2. Update current Planned Giving Program policy on an annual basis to ensure that proper procedures are in place to respond to inquiries.

3. Maintain a targeted annual marketing plan that includes a personal contact with existing Legacy members and a targeted outreach program to potential new members.

Legacy Society Members
Ms. Myrna Abramowicz
Ms. Donna R. Altes
Mr. David Aten
Judge Wm. L. Blanckenburg
Mr. and Mrs. Richard J. Bremer
Dr. Chris Burditt*
Mr. & Mrs. Alan Cash*
Mr. Fred Caspersen
Mr. Mark Cordeiro
Ms. Helen Dunlap*
Ms. Ann Evans
Dr. Bill Feddersen
Ms. Dolores H. Fischer*
Ms. Simone Fontaine
Mr. & Mrs. Gary Garaventa
Mrs. Betty B. Hagedorn
Mrs. Julie Hall
Mr. John Heflebower
Mr. Carlyle Johnson
Mr. Bruce Ketron
Mrs. Marian Long
Mr. & Mrs. Frank Lucier
Mr. David Mahaffey
Mr. and Mrs. David W. Meyers*
Ms. Cate Merritt Murphy
Mr. Jeff Omodt
Mr. Michael Oster
Mr. & Mrs. Dennis Pedisich
Mrs. John Quigley
Dr. and Mrs. Hugh Reat*
Dr. Ed Shenk
Mrs. Bette Smith
Mr. and Mrs. Perry Teaff*
Ms. Evie Trevethan
Mr. and Mrs. Ken Tronstad
Ms. Judie Walter-Burke*
Dr. Diane Woodruff*
*Charter members

Planned Giving
Bob Hoffman, a Vice President at Thompson & Associates, has been contracted to offer charitable estate planning at no cost to individuals. Charities pay an annual fee to be able to offer the firms' services to their donors. No financial products of any kind are marketed and there is no obligation to participate, or to implement any plans created by participating. The goal of Thompson & Associates is to support the work of attorneys, accountants and other professional advisors that assist families with charitable estate planning. Thompson does not create wills or trusts, but helps donors design a blueprint that may include such instruments. Partners includes: Napa Valley College Foundation, Aldea Children & Family Services, Cope Family Center, Justin-Siena Foundation, Land Trust of Napa County, Napa Valley Community Foundation, Red Cross of Napa Valley.