

THE SAN DIEGO FOUNDATION CHAIR'S AND PRESIDENT'S REPORT

A Report to the Community from
Colette Carson Royston
and Bob Kelly



November 2004

The Facklers Give Back Through Real Estate

Kathy and Mark Fackler are charitable-minded individuals and have been involved with giving through The San Diego Foundation for years. This past year when the Facklers were thinking about selling investment property they owned in Big Bear, they made the decision they did not want to reinvest the profit in real estate, but instead, to invest it in the community. Their property appreciated to the Facklers expectations and they were ready to simplify their lives. They were ready to say good-bye to the risks that came with owning the property: financial risks, tenant-injury risks and the high risk of natural disasters such as an earthquake or fire. "The risk really came from liability, not only could we lose the property, but we could lose a lot more," Mark explained. The Facklers chose to gift half of the property to the Charitable Real Estate Foundation (CREF), a supporting organization of The Foundation, and upon the sale of the property, those proceeds were added to the Fackler Family



Mark and Kathy Fackler with sons Steven and David.

Fund at The San Diego Foundation. Mark says, "Our story is pretty simple; we've been fortunate in building a successful business and feel committed to
Fackler Family continued on page 3

An Evening of Celebration

The San Diego Foundation's Current and Past Board of Governors celebrated their commitment to the community at the Annual Past Board of Governors Dinner on October 28th at La Jolla's Sea Lodge.



*Ann Parode (left),
Martha Dennis (center) &
Colette Carson Royston (right)*



*Bill & Lollie Nelson and
Paul Meyer (right)*



Frank & Evie Ault



*Ron Blair &
Jane Trevor Fetter*



*Connie Jamison &
Connie Custer (right)*

Year End Giving Guide: Questions to Ask Your Professional Advisor

We are fast approaching the time of year when most of us give great consideration to giving. You will give thanks, presents, and, in many instances, charitable gifts. At the same time, we are often pressed with year-end financial issues such as oncoming tax burdens. The San Diego Foundation can help you make a last-minute charitable gift for the maximum tax benefit. To help with this, here are some ideas:

- ♦ If you have sold a business, inherited property, or otherwise experienced a change in circumstances this year, The San Diego Foundation can help you structure a charitable gift that will mitigate your tax implications.
- ♦ While your checkbook may be the usual vehicle for making your gifts, consider making a gift of stock. Giving appreciated property increases the financial benefit to you. The Foundation can accept publicly traded, closely held and restricted stock, allowing you to avoid capital gains tax, receive an income tax deduction for the fair market value of the stock, and convert complex assets into charitable gifts.
- ♦ Do you have a paid-up life insurance policy that has been gathering dust in a drawer? Perhaps it was intended for your children, who are now grown and have sufficient assets of their own. Making The San Diego Foundation the owner and beneficiary of such a policy provides an income tax deduction for you and a great charitable gift.
- ♦ Need to make a charitable gift now, but don't feel you have enough time to properly consider which organizations you would like to support? Opening a Donor Advised Fund allows you to make a gift now, receive an immediate tax deduction, and have time to consider how you want your charitable dollars distributed.

During this hectic season, The San Diego Foundation makes charitable giving easy. For more information on how to make a last-minute gift, contact a member of the Charitable Giving Team at 619-235-2300.



*Friends of The
Foundation.*

Be part of
the answer to
“What’s Right with San
Diego.”

Return the enclosed
envelope today,
or call
619-235-2300
for more information.

What’s New @ www.sdfoundation.org?

The Foundation is proud to launch the “Community Impact” section of its website. This section was launched in mid-November and is an effort of The Foundation’s *Understanding The San Diego Region* initiative. The Community Impact section of the site is a forum and information source of The Foundation’s six priority areas: Arts & Culture; Environment; Health & Human Services; Civil Society; Organizational Success and Science & Technology. The Foundation encourages YOU to explore and enjoy the Community Impact section at:

www.sdfoundation.org/communityimpact



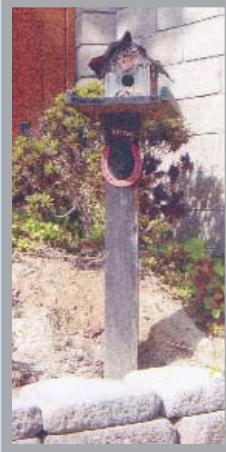
From Ashes To Art:

Art Helps Fire Survivors in the Healing Process

When The San Diego Foundation awarded a grant to the Wildfire Recovery Project for \$20,000 back in June of this year, it did not anticipate the magnitude and personal impact this grant would make in the lives of many San Diego fire survivors. This grant was made to fund art projects designed to assist with the healing and recovery process for fire survivors. Outreach workers have been offering therapeutic art activities and experiences to fire survivors all over the county. For example, local artist Annie Norton offered her expertise to teach fire victims how to make mosaic stepping stones from pieces (such as broken china) they pulled from their burned homes. Many participating survivors have said that these activities have been a major part in their healing. Various art activities expanded to include student victims in the Alpine, Julian and Ramona schools. Students collected materials from their burned homes and created mosaics, flags and birdhouses for the yards of their new homes.



Fire survivors would often come to a Mosaic Workshop with only a cup or two of broken china, yet leave with a beautiful art piece as shown in these pictures.



Birdhouses like this one (left) were made by high school students for the yards of their new homes.



Women participate in Mosaic Workshops held in Crest (left).

Fackler Family continued

give back as much as we can. We've been gifted with so much and it only seems right to return the gift to others."

The Facklers contribute countless hours and financial resources to many causes and organizations they find inspiring, including the Tariq Khamisa Foundation, in which Mark is highly involved with and currently serves as its volunteer interim executive director. Tariq Khamisa Foundation (TKF) is a grass-roots organization addressing youth violence. Tariq, a 20-year-old San Diego State University student, was shot in the back and killed by a gang member while delivering pizzas. Tariq's father, Azim, chose to transform his grief into something more powerful and established TKF in October 1995. Extraordinarily, Azim reached out in forgiveness to the family of his son's assailant and together they dedicate their lives to ending the plague of youth violence in our country.

Knowing there are many ways to give, the Facklers chose to turn their investment

property into a gift to the community, partnering with The San Diego Foundation. In return they're receiving more than just a tax benefit; they're leaving their mark on San Diego by supporting programs important to them.

To learn more about gifts of real estate, please contact Berit Durler at 619-235-2300. For more information about the Tariq Khamisa Foundation, visit <http://www.tkf.org>.

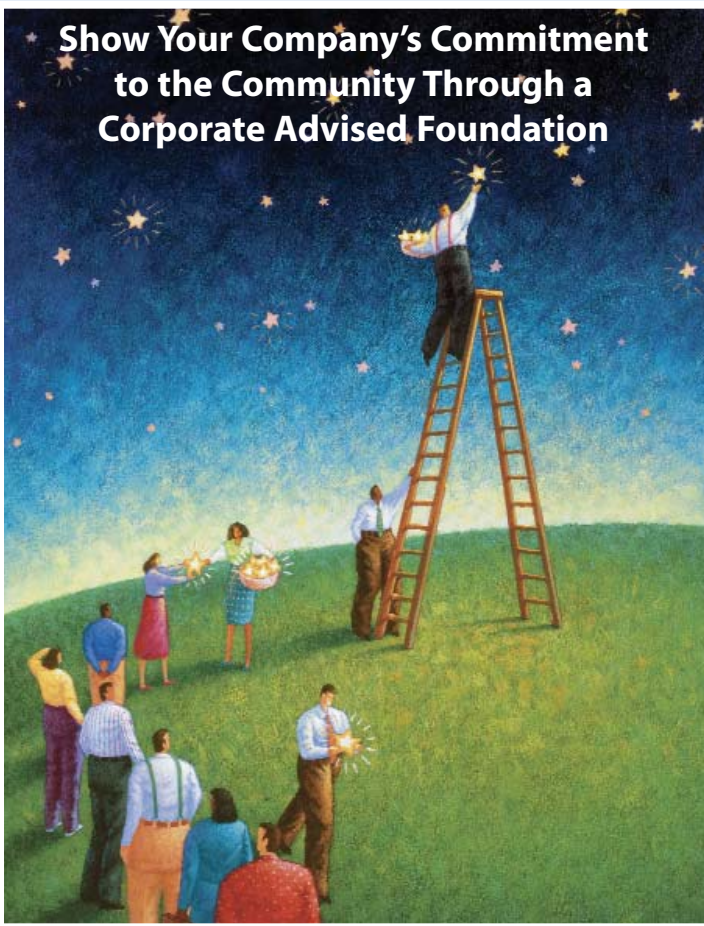
Giving Now Giving Later



Support the causes you love now and create a lasting legacy for the future

To learn more about Legacy Funds, call Charlene Pryor at 619-814-1309.

Show Your Company's Commitment to the Community Through a Corporate Advised Foundation



Does Your Business Plan Include a Corporate Giving Program?

The San Diego Foundation offers a broad range of charitable giving options including **Corporate Advised Foundations**, which are designed to meet the needs of San Diego businesses.

Most companies give to charities and nonprofit organizations for the best possible reason: to support community groups and their missions. But such investments can help the company as well, not only in tax benefits but in building goodwill, marketing exposure and employee satisfaction. The San Diego Foundation can help businesses maximize the results of their charitable giving program while minimizing the administrative burdens.

To learn more, please contact Jill Metcalf at 619-814-1342 or jill@sdfoundation.org.



Visit the **NEW** website section about **Corporate Advised Foundations** at:

www.sdfoundation.org/donor/corporatefunds.shtml

WHO WE ARE

The San Diego Foundation's purpose is to improve the quality of life in all of our communities by promoting and increasing responsible and effective philanthropy.

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CHAIR'S AND PRESIDENT'S REPORT

A Report from Colette Carson Royston, RN, MN
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