



June 2017

Fund Facts

Investments transferred

BY APRIL WORKS

In 2016 the Panorama Benevolent Fund decided to change investment advisors in order to reduce advisor fees, simplify our investment assets and obtain appropriate continuing education for the finance committee and board members. All of these objectives were met with US Bank's Charitable Services Group (CGS) based out of Portland, Oregon.

A fundamental and useful strength of the CGS team is to provide ongoing education tailored to *our* needs. Their offerings include lectures, workshops and writings on timely investment topics. Trainings include:

- Important aspects of investment policies.
- Updates on laws and regulations governing endowments.
- Overview of planned giving vehicles.
- Marketing a planned giving program. ♦

Estate and charitable planning basics for donors—Seminar

August 11th. See page 6.



2017 Patio Sale

BY LINDA KALKWARF

Get ready! It's almost here! Whether this visit will be your 1st or your 47th—or somewhere in between—grab your shopping bags and head over to the Panorama Benevolent Fund's Annual Patio Sale on July 14th and July 15th.

Friday from 9:00–11:30 a.m. is set aside for resident shoppers with wheelchairs and walkers; the resident may be accompanied by one caregiver. From noon to 3:30 p.m. all employees, residents, contractors and their families are welcome. Saturday from 9:00–3:30 p.m., everyone is invited.

This year *Encore Furniture & Books* on 14th Street will house all furniture and books which will make set-up and take-down easier for all those volunteers who spend countless hours before and after the sale. Encore will be open all day Saturday during Patio Sale hours, but on Friday it will only be open from 9–11:30 a.m.

You can find almost anything your heart desires displayed behind the Chalet in the parking area—kitchenware, fabrics, decorative pillows, linens, small appliances, luggage—and collectibles will be inside the Stiles-Beach Barn. Enjoy the new Art Walk area to select that perfect piece for your home. And don't forget to stop at the Food Court to refuel so you can continue to find those can't-do-without treasures. ♦

See **PATIO SALE**, pages 2 & 3.

BENEVOLENT FUND

Sales Coordinating Committee

Co-Chairs
Ernesta Ballard
Mike Hays

Stiles-Beach Barn
Marlys Baker
Carol Thomas

Pick-Up
Pat LaViollette
Gary Proctor

Acquisitions
Terri Frazier
Bev Franklin
Ellen Sweetin

Encore Books
Marsha Majors
Wendy Taylor

Encore Furniture
John Clark
Ken Hooper

July Patio Sale
Carol Thomas
Ernesta Ballard

 Like us on Facebook:
Patios at Panorama

Patio Sale Volunteer Recruitment

June 21 & 26
10 am – 1 pm
Pan Hall

BOARD OF TRUSTEES ELECTION 2018

BY NORM WOHLKEN. PRESIDENT

“For everything there is a season and a time for every matter under the heavens.”

So begins the third chapter of Ecclesiastes. Though not mentioned, it will soon be the season and the time for the election of Trustees for a three-year term beginning in 2018.

At the May 23rd meeting of the Board of Trustees, a Nominating Committee of Betty Dodds, Mary Anne Enns, Carol De Mers and Jay Felzien was appointed. Mary Anne Enns is the Chair of the Committee. They have an imposing task because there will be seven vacancies to fill. That’s almost half of the fifteen trustees!

In order to maintain an effective Board, the Fund needs to have Board members with a variety of specific and general skills and experiences. As specified in the Fund’s bylaws, the function of the Nominating Committee shall be: 1) to solicit from the Board members a list of the desirable knowledge, skills and abilities that should be possessed by nominees to meet the ongoing fiduciary, current operational and future planning needs of the Board; 2) to solicit from the membership-at-large suggested potential candidates for nomination to the Board; 3) to verify that each potential candidate has been a resident of Panorama for at least one year and is a member of the Fund; 4) to collect information on each potential candidate in relation to the needed knowledge and/or skills identified by the Board; 5) to submit to the Board a list of qualified candidates. The closing date for nominations is the second Friday in August (the 11th this year).

Then, at the Board’s August meeting (the 22nd this year), the Nominating Committee submits a list of qualified candidates who have agreed in writing to serve if elected. The Board President shall appoint three tellers (known as the Ballot Committee) who will collect and tally the ballots following the close of the election.

Following the Board’s September meeting (the 26th this year), a ballot shall be mailed to Benevolent Fund members. The ballot will contain a short bio and photo from the Panorama Directory), and ballot boxes will be available in Pan Hall and the three apartment buildings from September 30 until the close of the election on the second Friday in October (the 13th this year). The ballots are collected and tallied by the Ballot Committee and reported to the Board President.

The names of the elected Trustees will be announced by the Chair of the Ballot Committee at the October 24th Board meeting. The newly elected Trustees receive an orientation prior to their seating as Board members at the Fund’s Annual meeting on January 23, 2018.

If interested in serving as a Fund Trustee, please contact any member of the Nominating Committee. ♦

On a mission...with help!

BY MARY JO SHAW

All characters appearing in this story are fictitious. Any resemblance to real persons, living or dead, is purely coincidental.

Ann and Bob were high school sweethearts and went on missions to Mexico until they married at age 20. After their two boys were grown and married, Ann and Bob accepted the challenge to lead the young adults of their church on missions to make repairs on vintage homes for the underprivileged. They donated the balance of the resources needed to complete the assignments for 23 years. Both felt giving was their mission in life. The rewards far exceeded the expenses.

Being prudent, they saved for retirement, Their small savings and investments through their credit union paid off. As they aged, so did their home. Keeping up with the maintenance was too daunting...gutters, roof, and yard!

They qualified for Panorama and wisely selected a comfortable garden home among mature, well maintained trees and bushes. Being hard workers, volunteering drew them to the Stiles-Beach Barn. Bob drove the truck with others who picked up residents' donations for resale. Ann loved working with new-found friends sorting and pricing items. They looked forward helping at the annual patio sale in the summers.

But at age 89, Bob fell, broke his hip, and never recovered. Ann's failing eyesight compounded her grieving months. She knew she could volunteer if she could see well and feel more confident with her walker but insurance didn't cover eye care. Depression kept her homebound until a neighbor reminded her: "Ann, remember we all paid our whopping lifetime dues of one dollar to be a member of the Benevolent Fund...it's for us."

"Oh, but we never had to beg for money. I don't feel right," she said. Again her neighbor reminded her that only two people know the names of residents applying for benevolent funds. This neighbor convinced Ann to call Panorama Social Services. Before long, thanks to Benevolent Fund support, Ann was able to have her cataracts removed and rejoined her welcoming friends. She felt comfortable again on her mission of giving while she visited friends and sorted and priced donated items. ♦



2016 patio sale volunteers; Emily Zabranski, Betty Dunithen, Loretta Murphy, Shirley Sawdon, Roxanne Cobb

Patio Sale Transportation

There is no shortage of ways to get to the Patio Sale!

Resident Transit

Resident Transit will operate as normal on Friday. Reservations may be made for pick-up 8 am –12:30 pm and 12:40 pm–5 pm. The same service, also by reservation, will be provided on Saturday. On that day Resident Transit will be stationed at the main entrance to the Chalet so no return reservation is required. Also on Saturday, Resident Transit will take you to *Encore Furniture & Books*, but at that site, call for pick-up.

Shuttle Service

Shuttle Service will be provided on Friday, July 14 between 8 am and 4 pm with a break between 11:30 am and 12:30 pm. A map will be included in the July Panorama News and be available at the Activity Desk in Pan Hall and in the Quinault and Chinook. Flags will indicate the shuttle stops around the campus, but the kind drivers will always pick up residents they see en route.

There will be an additional shuttle bus running only on Saturday from the Chalet at the Willow Street gate directly to *Encore Furniture & Books* and back for residents and visitors to use. This shuttle will include a stop at the Clinic parking lot.

So bring your checkbook or cash to the oldest patio sale in Thurston County. With a \$10 minimum purchase Visa and MasterCard are accepted. And tell your family and friends about it. ♦



PANORAMA BENEVOLENT FUND

TRUSTEES & APPOINTEES

May 29, 2017

NAME	OFFICE/COMMITTEE	EMAIL ADDRESS	PHONE	TERM
Officers				
Norman Wohlken	President	njwohlken@gmail.com	5500	01/2019
Gail Madden	Vice-President	foggyday@whidbeyisland.com	5065	01/2020
Ruth Shearer	Secretary	shearrj@aol.com	5682	01/2018
Don Whiting	Co-Treasurer	debordon@comcast.net	5628	
April Works	Co-Treasurer	aprilworks@gmail.com	5496	
Trustees:				
Dave Bartruff		davidbartruff@comcast.net	5992	01/2019
Ruth Brigden	Recognition/Memorials	rmbrigden@gmail.com	5786	01/2018
Betty Bettencourt Dodds	Membership	2betty@hevanet.com	5722	01/2018
Suzanne Dahlman	Finance Committee	wyosue@comcast.net	5221	01/2018
Mary Anne Enns	Social Assistance	2enns@comcast.net	5505	01/2018
Jay Felzien	Social Assistance	thetsrguys@yahoo.com	5473	01/2020
Judy Konopaski	Social Assistance	budjude@msn.com	5209	01/2018
Nancy Luck	Coordinating Committee	nnnlll@comcast.net	5771	01/2019
Diane Stiles	Recruitment	jolove1@comcast.net	5406	01/2020
Dale Vincent	Public Relations	dallenvincent@gmail.com	5561	01/2018
Appointees				
Kristine Bartruff	Social Asst/Memorials	dkbartruff@comcast.net	5992	
Cynthia Daniels	Social Assistance	pickingmate@gmail.com	5048	
Georgia Vincent	Social Assistance	dallenvincent@gmail.com	5561	
Carol De Mers	Membership	carolademers@yahoo.com	5561	
Linda Crabtree	Fund Facts Editor	crabtreesjl@gmail.com	5028	

Office Emails:

PBF-President@Panorama.Org

PBF-Treasurer@Panorama.Org

PBF-Secretary@Panorama.Org

Terms run to the Annual Meeting in January of the year listed.

PanoramaBenevolentFund@Panorama.org

Paying it forward

BY GAIL MADDEN

Here comes the Patio Sale, and here comes a new idea for you to participate. You have a unique opportunity to...“pay it forward”. You can do something for a stranger, someone you have never met, a person or family in need of the goods we will sell on July 15th. Don and Rosalie Melnick came up with a great idea for their church fund-raising auction when they purchased a gift certificate to the Patio Sale as an auction item. This got us to thinking.

One of the issues we have is that, face it, many of us don't need another thing; our homes are full and mostly we try to give stuff away. But we have churches, fraternal organizations, and charities in the community that know people and families who certainly need many of the Patio Sale items. Perhaps the Fire Department knows of a family who could use some household goods, maybe your pastor or priest

Sometimes, the greatest impact we have on the world is the one we never see.

has a list of families who need items, perhaps charities like Safe Place or the Coalition Against Domestic Violence, or a local homeless shelter, or any number of groups around town would welcome a gift certificate to shop at the Patio Sale to provide items for their clientele.

Here is how this plan works. We are offering gift certificates that you can purchase and donate to the charity or group of your choice. You decide the dollar amount (\$25.00 minimum) and bring a check or money to the PBF office during normal business hours and pick up the certificate. Your contribution becomes a donation to the Benevolent Fund and the person or group receiving the certificate can use it like cash at the Patio Sale. They are available for sale in

the Benevolent Fund office from now thru July 12th. We hope you will take advantage of this opportunity to participate in the Patio Sale by “paying it forward”. Sometimes, the greatest impact we have on the world is the one we never see. ♦

THANKS TO OUR DONORS!

The following residents donated to the work of the Benevolent Fund this quarter. The donations were in the form of memorials, gifts of appreciation, cash donations, or bequests. The Benevolent Fund, a not-for-profit organization operated for and by residents provides 1) financial assistance and support to residents in need, 2) services and funding for quality-of-life projects for the benefit of all residents, and 3) help for a smooth transition through the phases of aging.

Bob & Ruth Brigden	Andrew Johnson & Pricilla Raughley	Pat Swan
Sally Bush	Mary Mann	Harry & Carol Thomas
Betty Curneen	Sharon McGinley	Audrey Thomsen
George Hinkel	James & Millie Pluntze	Neil & Jane Vasconcellos
Betty Hutt	Luwanna Reinhart	Carol Wilder
Betty Jankus & Charlotte Hopper	Albin & Pat Saari	

Shirley Atwater & Dottie Simonsen in honor of Ruth Brigden

Dave & Kris Bartruff in honor of Ruth Brigden

Morgan & Mary Jo Lavin in honor of John Clark

Office: Quinault Lower Level. M-W-F, 7–1 pm; T-T 7–1 pm. (360) 438-7556. PBF-Secretary@Panorama.org, **Staff:** Secretary, Connie Cameron. **Social Services:** Adele Hadley, Corrine Wasmundt, Sara Wasser. **Board of Trustees:** President Norm Wohlken. Vice-President Gail Madden. Secretary Ruth Shearer. Treasurers Don Whiting & April Works. Members: Dave Bartruff, Ruth Brigden, Betty Bettencourt Dodds, Suzanne Dahلمان, Mary Anne Enns, Jay Felzien, Judy Konopaski, Nancy Luck, Diane Stiles, Dale Vincent. **Appointees:** Social Assistance: Kristine Bartruff, Cynthia Daniels & Georgia Vincent. Membership: Carol De Mers. Memorials: Kris Bartruff. Fund Facts Editor: Linda Crabtree.

Panorama Benevolent Fund

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ESTATE PLANNING SEMINAR

August 11, 10 a.m., Panorama Auditorium

As a result of the transfer of our investments, we are offering the first seminar tailored to our needs from Rebecca Bibleheimer, our investment advisor at US Bank. Whether you already have a will and trust or are still considering your needs and options, this seminar will provide you with relevant information on the estate planning process and its goals. We will cover everything from who needs a trust to tax planning techniques. This seminar will give an overview of important information to understand while navigating the estate planning process and making decisions about your own plans. This seminar is intended to be informative and helpful in answering the basic questions involved in developing a plan for your own assets, family, and favorite charities. ♦

Rebecca Bibleheimer, JD LLM
Senior Philanthropic Advisor
Vice President
US Bank Charitable Services Group
(503) 464-4909
111 SW Fifth Ave., Ste. 600
Portland, OR 97204



Rebecca Bibleheimer is a Senior Philanthropic Advisor and Vice President with the US Bank Charitable Services Group. She works exclusively with tax exempt organizations and individuals with philanthropic intent and her specialty is planned giving.

Prior to joining US Bank Charitable Services Group in 2005, Rebecca worked as a trusts and estates attorney for a tax boutique law firm in Portland, Oregon. She graduated cum laude with a Juris Doctorate from California Western School of Law and with a Legal Letters Master from the University of Florida, Leven School of Law. Rebecca worked as an editor for the law review journals for both schools. Rebecca is a member of the California State Bar and the Oregon State Bar. She served on the Board of Trustees for the Oregon Humane Society for six years and currently serves on the Legacy Health Allied Professionals Council, Oregon Public Broadcasting's Gift Planning Advisory Council, and Albertina Kerr's investment and planned giving committee, as well as several other planned giving related committees. She is the current President for the Northwest Planned Giving Roundtable and has served on the Executive Committee for seven years.

Rebecca lives in Portland, Oregon with her husband and their two young daughters.

