



ROTARY CLUB OF BENICIA

Club founded in 1967

Important Dates and Opportunities for Service & Participation

- 2/19/19 — A visit from DG Jon Dwyer
- 3/22/19 — Firefighters' Night of Honor — Fairfield
- 3/30/19 — Benicia Library Trivia Bee
- 4/6/19 — Rotary Spring Assembly
- 4/26/19 — Napa County Hispanic Chamber of Commerce Golf Tournament — Eagle Vines — Napa
- 5/5/19 — 12th Annual BEF Run for Education
- 5/17/19 thru 5/19/19 — Rotary 4-Way Fest — Reno
- 7/27/19 and 7/28/19 — Benicia Waterfront Festival
- 8/9/19 — 14th Annual Rotary Golf Tournament
- 8/10/19 — Annual Peddler's Fair
- 10/5/19 — Rotary Fall Seminar

Estate Planning — Joan Grimes



Joan Grimes was our guest speaker today, and also a fellow Rotarian from the Alamo Club. Joan is from Lafayette, CA, and attended UC Berkeley and Cal Western School of Law in San Diego. She is lawyer with offices located in Walnut Creek and Brentwood.

Joan's presentation was about why it is important to have a trust. When our parents were living, a simple will was all that was needed. Mom left everything to dad, and dad left everything to mom. And after they both had passed, their heirs got to figure everything out. In the 1970's, laws were enacted to allow people to have a revocable living trust. A trust is simply a conduit where you place everything. You still own everything, but all assets are placed in the trust. Your assets still benefit you during your lifetime and can then be transferred to designated beneficiaries at the time of your death. Having a trust will make the process of passing your estate to your loved ones easier. Living trusts avoid the probate process, which can be expensive, time consuming, and your loved ones have no control over the process. A living trust allows you to control all of our assets, and prevents the court from controlling your assets if you become incapacitated. Even with a trust, you still need a will which would "catch" anything that you had failed to place in the trust.

Joan answer many of our question. We all learned so much! Thank you, Joan, for speaking to our club today.

John Blunt to Bring M&Ms

Bring your dollars on 2/19! John Blunt will be returning from his Blackjack outings with his arms full of coffees, candies and other goodies, all of which he donates to our club as a fundraiser. When you purchase these items, our club makes money! A great deal for us, and besides, the M&M Peanuts are the BEST EVER! Thank you, John, for helping to raise money for our club.

Happy Dollars

Susan Hurl had a birthday and was \$62 dollars happy. For her birthday, she planned on watching the State of the Union address!

Jim Trimble just returned from Santa Catalina Island. He was with 14 other people from Benicia. He was \$20 happy.

Jon Dwyer recently returned home a night early and discovered that his water heater had sprung a leak. Although it cost \$1750 to replace, the damage from the water would have been much greater had he returned home the next day as originally planned. He was \$20 happy.

Eric Hogle was \$2 happy. He got a call from his bank that there was activity on his credit card in Peoria. Eric hadn't been to Peoria. Now he has no credit card. His wife is happy!

Darrell Doi was \$10 happy as his daughter got to start the BHS soccer game!

New Plaque for our Rotary Club

Marion Gizzi has been working on the details of obtaining a plaque to be placed outside the Benicia Yacht Club. The plaque will list our club's name, our meeting time, and have the new Rotary symbol. Presently, the plaque will cost \$667.50. A few issues still need to be addressed before the plaque is ordered. This is a simple drawing of how the plaque may appear.



Thank you, Marion, for your work on this project!