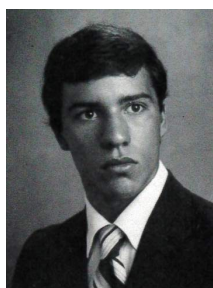


# A GIFT TO LAST A LIFETIME

FRANCIS PARKER SCHOOL PLANNED GIVING NEWSLETTER

SUMMER 2023

## Leaving a Legacy For the Future of Parker: John Romero '84 Reflects



John Romero '84 was on track to attend Parker before he was even born. "My mom called the School to find out about the possibility of me attending while

she was pregnant," John remembers with a laugh. "They told her to call back in a few years when I was closer to preschool age."

She did, and John attended Parker from Junior Kindergarten until he graduated high school in 1984. His experience at the School lived up to his mother's expectations, and John has been an enthusiastic Parker supporter ever since.

True to their enthusiasm, John and his wife, Desiree, insisted that their daughter—Taylor Romero, Class of 2013—attend Parker. "As much as Parker did for me, I am ten times more grateful for what Parker did for her," John reflects. "She has become a fantastic, successful, happy, well-adjusted, wonderful young lady, and I give Parker a lot of the credit for that."

Most Parker parents look for both a safe and supportive learning environment for their children and preparation for the next level of education. "Taylor often said what I heard a lot of other Parker students say—that Parker was harder than college," John says. "She was absolutely well-prepared."

John and Desiree explain how thankful they are for the near overwhelming support their daughter received from teachers, staff members, and coaches. "I was confident that Parker would be the best place for her, and I was proven right. It was a fantastic experience," John emphasizes.

Aside from being a Parker alum and parent, John also served as a coach. While serving as assistant football coach under John Morrison and Dan Kuiper and assistant basketball coach under Jim Tomey, John was truly impressed by the knowledge and professionalism of everyone in the athletics department. "As a student and a coach, I have witnessed hundreds of Parker athletic events, and the sportsmanship and the class of Parker athletes have been near perfect," he recalls.



*John '84 in action for Parker's football team.*



*Desiree, John '84, and Taylor '13 Romero*

After many years of positive experiences with Parker, John and Desiree chose to include Parker in their estate planning, leaving behind a strong and lasting legacy of their deep appreciation and commitment. "Parker has not only given to me, but it's given to my daughter and my whole family," John emphasizes. "The possibility that we can help a future Parker family have that same experience makes it all worth it." During the turn of the century campaign, John and Desiree funded a generous planned gift by joining the Parker Legacy Club.

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*Join the Romero family by becoming a member of Parker's Legacy Club.*

# Partnering for Parker's Future

Have you thought of how you can continue to encourage excellence at Parker for generations to come? Your support creates a strong, sustainable future for Parker and our students.

Planned gifts can support a wide variety of initiatives, including academics, arts, athletics, faculty professional development, and student financial assistance, to name just a few. Every gift impacts the educational journey and enhances the experience of Parker students. We understand that these priorities are important to you and your family. We invite you to contact us today to discuss gift options, tax incentives, and how we can help you achieve your philanthropic goals. Let's partner together to enhance Parker's future.

## What is Planned Giving?

Planned giving is the art of designing charitable gifts so that you realize your philanthropic objectives while minimizing your after-tax cost. Planned gifts accomplish two worthy goals at once: ensuring Parker offers an exceptional education to future generations of bright students and providing financial benefits for you and your loved ones. Planned gifts are a way to honor Parker and put your own finances on firm ground.

A wide range of planned giving choices present practical options to contribute to the School's well-being that may create financial and tax advantages for you. Whether you want to put your donation to work immediately or design a plan that benefits our students after your lifetime, giving back to Parker as part of your planning enables you to honor Parker's past and secure its future.

We invite you to think about the legacy you can leave for the Parker community.

## Gifts That Pay You Income

### CHARITABLE GIFT ANNUITY

The charitable gift annuity is among the simplest and most popular of the charitable life-income plans and may be funded with cash or appreciated securities. You may benefit from an immediate charitable income tax deduction and get relief from tax on capital gains. Payments to you may begin immediately or be deferred until the money is most needed. The latter option is particularly attractive if you have a high current income, can benefit from a current tax deduction, and/or are interested in augmenting future retirement income on a tax-favored basis. Following your lifetime, the remaining assets go to support the mission of Francis Parker School.

### CHARITABLE REMAINDER TRUST

A charitable remainder trust is popular because of the significant financial and estate planning flexibility it offers. This trust may be funded with cash or appreciated assets such as securities, real estate, or other property. You receive an immediate charitable income tax deduction and income, and may get relief from tax on capital gains. Depending on the type of remainder trust you set up, you and other beneficiaries can receive income for life or a set number of years. When the trust expires, the remaining assets in trust go to support the mission of Francis Parker School.







# Planned Giving Options

## CHARITABLE LEAD TRUST

A charitable lead trust may be an excellent way for you to transfer significant assets to your children or grandchildren without payment of gift or estate taxes, depending on how it is structured. Charitable Lead Trusts are very appealing income and wealth transfer vehicles for donors with large estates. The trust pays income to Parker for a certain period of time and then either returns the assets to you or distributes them to your heirs at your passing.

## IRA CHARITABLE ROLLOVER

If you are 70½ or older you are eligible to make a tax-free charitable donation directly from your IRA to a charitable organization. The donation counts toward your required minimum distributions. The IRA Charitable Rollover allows individuals to give up to \$100,000 annually of their IRA distributions directly to a charitable organization such as Parker.

## LIFE INSURANCE

Implementing a new life insurance policy makes it possible for you to convert all premium payments into a much larger gift of the insurance proceeds at death and to receive annual tax deductions for the amount paid.

## RETIREMENT PLAN

A simple way to make a gift is to name Parker as a beneficiary of all or part of what might remain in your retirement plan upon your passing. Such a gift is not subject to income or estate taxes when paid to Parker, a charitable organization.

## WILL AND LIVING TRUSTS

A bequest is a statement in your will or living trust which passes a portion or all of your estate to another person, persons, or charitable organization. Charitable bequests enable you to make significant gifts that you could not have made during your life. Naming Francis Parker School (San Diego, CA) as a beneficiary of your will or living trust can reduce or eliminate your taxable estate.

## TYPES OF BEQUESTS

**Bequest of Property**—Parker receives specific assets, such as securities, an interest in real estate, or tangible personal property.

**Residuary Bequest**—Parker receives all or a percentage of the remainder of the estate after the payment of any specific bequests and all estate-related expenses.

**Contingent Bequest**—Parker is given a bequest only in the event of the death of other beneficiaries. This ensures that property will pass to Parker rather than to unintended beneficiaries, including the government.

## WE'RE HERE TO HELP!

The Parker Advancement staff is available to answer your questions about planned giving.

### Shara Freeman Hoefel

Assistant Head of School  
for External Relations  
858/569-7900 ext. 4106

### Allison Morrissey

Director of Development  
and Stewardship  
858/569-7900 ext. 4139

SAMPLE BEQUEST LANGUAGE IS AVAILABLE ONLINE AT  
[WWW.FRANCISPARKER.ORG/PLANNEDGIVING](http://WWW.FRANCISPARKER.ORG/PLANNEDGIVING)

# Members of the Legacy Club

Members of the Legacy Club play an integral role in securing Parker's future through planned gifts. Since most of these generous gifts will be realized by Parker after the donor's lifetime, the Legacy Club was created to thank donors for their intentions during their lifetime.

*(List updated 6/1/2023)*

The Anklesaria Family  
Judi and Jim Douglas  
Daniel '88 and Susan Frazee  
Sammy Gross '71  
Christine Hickman and Dennis Ragen  
Julie Johnson Iavelli '49  
Gert\* and Aline Koppel  
Lawrence Leffler '80  
Morton\* and Betty Jean Lichtman  
John and Carol Lindholm  
Marc Matys and Robert Gleason  
Timothy and Rhonda McIntire

John '84 and Desiree Romero  
Leslie and Marjorie\* Rose  
Dorothy Shumway  
Mitch and Elizabeth Siegler  
Jeff '75 and Karen Silberman  
Jim\* and Reggie Smith  
Sandra Snook  
Michael and Catherine Thiemann  
Anne Stephens Vafis '51  
James and Kathy Waring

*\*deceased*

*In Memoriam Members:*  
Margaret Simison Calhoun '32  
Esther E. Cleaves  
Adele Rice Foster '23  
Amelita Galli-Curci  
Rosalind Harris '29  
Bruce R. '32 and Mary Hazard  
Helen-May Marcy Johnson  
Ethel Mintzer Lichtman '40  
Henry '29 and Ruth Lippitt  
Mary C. Moore  
Romeo and Mila Quini

## Thank You

Thank you to all our Legacy Club members for your wonderful commitment to the Parker community—for today and tomorrow.

If you have not yet thought about your legacy to Parker, we invite you to join the Legacy Club. Your planned gift will have a long-lasting impact on the Parker community for generations to come.

If you have already included Francis Parker School in your estate plans, thank you! Please contact the Advancement Office so we can welcome you into the Legacy Club and thank you for your support and generosity.



PLEASE VISIT  
[WWW.FRANCISPARKER.ORG/PLANNEDGIVING](http://WWW.FRANCISPARKER.ORG/PLANNEDGIVING)  
TO LEARN MORE

