



HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

give
beyond your years

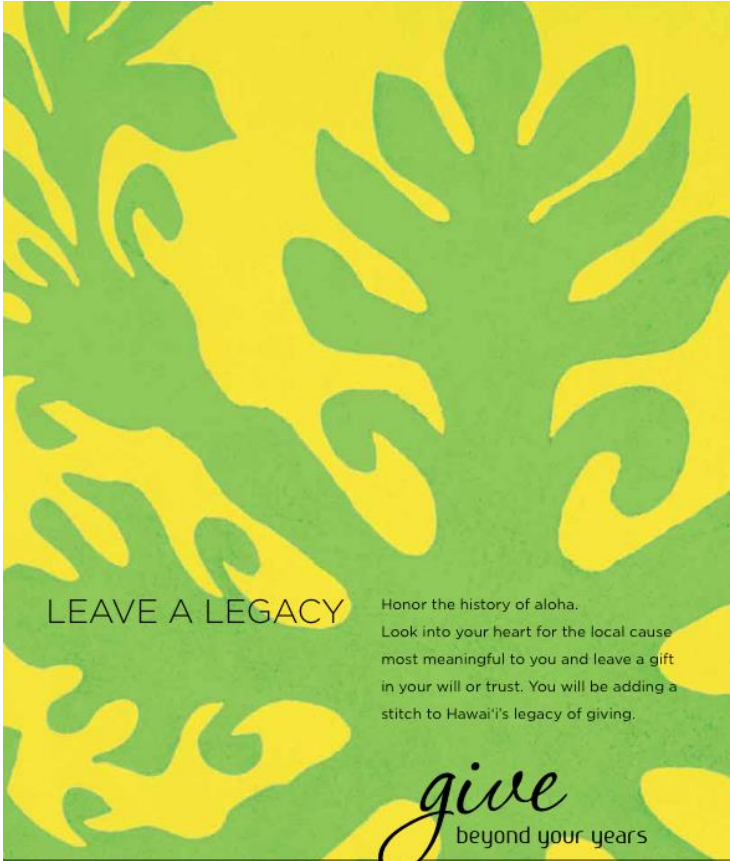
Hawai'i Legacy Giving Campaign

Thursday, October 6, 2016
Pōmaika'i Ballrooms, Dole Cannery



HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving


ALOHA & WELCOME



LEAVE A LEGACY

Honor the history of aloha.
Look into your heart for the local cause
most meaningful to you and leave a gift
in your will or trust. You will be adding a
stitch to Hawai'i's legacy of giving.

give
beyond your years



HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

A message from Hawai'i Community Foundation on behalf of nonprofit organizations serving the islands.
Learn more at HawaiiCommunityFoundation.org/Legacy or ask your professional advisor.



Our Time Together

What

Welcome & Introductions

Legacy Giving Campaign

Overview/Update

Legacy Discussions

Report from the Field

–Nonprofits

Report from Donors

Coming Soon

Who

Patti Look, Principal,
The FundDevelopment Group

Hawai'i Community Foundation

Martha Hanson, Associate Director of
Donor Relations

Curtis Saiki, General Counsel &
VP for Philanthropy

Joe Martyak, VP for Communications



Numbers to Date

Partners	107
-----------------	------------

Past Legacy Commitments (2014 & 2015)	629
--	------------

Projected Legacy Commitments (2016 & 2017)	909
---	------------



Sponsored CGA Program Update



OUR VERY FIRST!

CONGRATULATIONS to Elif Beall and HAPA for closing on a \$50,000 CGA!
The very first through our sponsored CGA program.



IMPORTANT NOTICE ABOUT OUR FEES

We suspended our 1% administrative fee effective August 1, 2016. Thus, our fees have decreased from 1.80% to .80%. We will charge a one-time \$500 set-up fee.

OTHER...

- We will accept new participants on a case-by-case basis in 2017.
- Our CGA Agreement has been updated Aug 2016. Please do not use a form with an earlier date.
- We will provide one-on-one training opportunities with our 2016 sponsored CGA participants in 2017.
- Stay tuned for educational opportunities regarding CGAs.





Sponsored CGA Program Update



Curtis Saiki, VP, Philanthropy & General Counsel

Direct 808-566-5521

csaiki@hcf-hawaii.org

Kawena Beaupre, Associate CG & Compliance Director

Direct: 808-566-5513

kbeaupre@hcf-hawaii.org

Tina Santos, Executive Assistant

Direct: 808-566-5572

tsantos@hcf-hawaii.org

Philanthropy: It's All About You – Legacy Stories

A PUBLIC SERVICE MESSAGE

• PHILANTHROPY: IT'S ALL

ABOUT you

Why do you love your job?
It's coming home after five school years, I was determined to give back. I had the great fortune of a wonderful childhood and education growing up in Hawaii and I wanted to do the same for others.

What is HCF poised to do for Hawaii's next 100 years?
It's our expertise, fashioned from a century of experience, along with the strategic relationships and resources we have built over time.

A PUBLIC SERVICE MESSAGE

• PHILANTHROPY: IT'S ALL

ABOUT you



Terry George

Navigating philanthropy – the power of partnership

ASK TERRY GEORGE WHY he's in the philanthropy business, and he's surprised. "Because," he says, "it's the right thing to do."

As President and CEO of the Hawai'i Community Foundation, doing the right thing means deciding education, real estate, and the arts are the pillars of our future. He's the windward community, and investing

engaged in learning. I saw them being tough-loved by their counselor, a young man who cared about them and they knew it. That counselor was there because of Connecting for Success. That felt good.

Why HCF?

TG: People who set aside resources for the community – they make up the Hawai'i Community Foundation, a place where people can do good and feel good about it. My first gift to HCF was \$150 for a women's fund. Then a few buddies stepped up and matched me. It made a difference.

We're smarter when we do it together. We do better when we learn together. HCFs got smart people who know how to solve problems. Every time I meet with them, I get smarter.

Why Hawaii?

TG: We're connected to each other, and the Community Foundation helps deepen those connections. You can see aloha in the humility and generosity of the business community. You can see it in the way we take care of each other in times of need.

Why Philanthropy?

TG: A mentor once told me, "Reduce your wants and meet your needs, and your opportunities will be endless."

A PUBLIC SERVICE MESSAGE

• PHILANTHROPY: IT'S ALL

ABOUT you



Paying it forward

Your name doesn't have to be Rockefeller to leave a legacy. When it comes to sending kids to college, Jon and Eleyne are betting big on Hawaii's future.

The Fias are a typical local family—hard workers raising their kids and planning for the future. When they set up their kids, they first took care of their college, then set aside funds to establish scholarships at Waipahu and Campbell high schools. As public school educators – Jon at Waipahu and Eleyne at Campbell – they've seen the power of college. Eleyne remembers the angry boy who'd been taken from his parents. "I'd look at him on I-5, and I'd think, 'If I don't help him, he's going to be a statistic.'"

U.S. Naval Academy a Navy Seal. "Why give up and walk away?" he says. "That's when you have to help."

Jon recalls the who motivated him the first in his family to college, playing football there. Now he's a coach. "Simple and such a huge impact on one's life," he says, "highlight tape he's got." UH's coaching office convinced him to walk with him to work.

• PHILANTHROPY: IT'S ALL

ABOUT you

Debbie Berger

What have you learned at HCF? Have there been any surprises?

DB: Everyone has a deeply personal reason for giving, and you will find something that will resonate and engage you among HCF's diverse outlets for philanthropy. What drives me to engage in philanthropy is the idea that we are all connected – we depend on each other.

What drives me

A PUBLIC SERVICE MESSAGE

• PHILANTHROPY: IT'S ALL

ABOUT you

A Stitch in Time

Ellen Hamada's Passion Lives On

Ellen Hamada's story reads like so many of her generation – a woman who worked hard, loved deeply, did good in her community, and made sure to leave a legacy that continues on after her death.

Widowed at a young age, Hamada turned to sewing as her livelihood and her passion. She founded the Fashion Center of Honolulu in 1949, taking the craft she'd learned in Japan and bringing fashion shows,

new styles, and the art of sewing to generations of students over the next six decades.

When Hamada passed away at the age of 91, she made sure the art she loved so much wouldn't die with her. Through the help of her long time friend and financial adviser, Hamada gifted her life insurance policy

Sewing is my passion, my love, and I want to help young generations keep it going."

to Hawai'i Community Foundation to establish a scholarship fund, making sure students looking to pursue a career in

DID YOU KNOW?

Establishing a legacy gift is as simple as talking with your financial advisor and thinking about what matters most to you. HCF is honored to manage over 200 legacy gifts that continue the dedication and passion of individuals.



College with dreams of launching her own clothing line. "She was such an inspiration, and she gave so much to the community," Pico said of Hamada. "Now I want to do that too and use some of the money from my clothing line to give back, just like she did." For Hamada, it wasn't work; it was her love, her passion, and she believed it her duty to pass that on, even after she could no longer navigate the needle and thread. "Her employees told us once that if a student couldn't pay, she'd say that's ok, we'll make it work," said Asato. By establishing a scholarship for

Kelvin Tak

HAWAII COMMUNITY FOUNDATION (HCF) is celebrating its 20th anniversary since 1998. 2015 and 2016 are one of the most powerful and influential people, selected by The Nonprofit Times, the potential, promise and deep choices of giving for our islands.

Did You Know... Hawai'i Community Foundation will feature a story each day on a family or individual who

HOW HAS PHILANTHROPY TOUCHED YOU?



Media Ads and Partnerships

Magazines	Newspapers	Radio and Television
<ul style="list-style-type: none">• Hawaii Business• HiLuxury• Honolulu	<ul style="list-style-type: none">• The Garden Island• Hawaii Tribune-Herald• Honolulu Star-Advertiser• The Maui News• Midweek Kauai• Midweek Oahu• New York Times – Hawaii Edition (Sunday)• Pacific Business News• West Hawaii Today	<ul style="list-style-type: none">• Hawaii Public Radio• Hawaii News Now



HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

Give Beyond Your Years



LEAVE A LEGACY


HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

A message from Hawai'i Community Foundation
Learn more at HawaiiCommunityFoundation.org/Legacy



INTROSPECTION

In a quiet moment, look upon the entirety of your life. Then select the local cause that fits and make a gift in your will or trust. Look back. Give forward.

give
beyond your years


HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

A message from Hawai'i Community Foundation
Learn more at HawaiiCommunityFoundation.org/Legacy



THE KIDS FIRST
THEN WHO?

*Se
the
Yo
we
yo*


HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

A message from Hawai'i Community Foundation
Learn more or ask your professional advisor at HawaiiCommunityFoundation.org/Legacy



FORWARD YOUR LOVE

If you have a deep abiding connection to Hawai'i, select a local cause and leave a gift in your will or trust. Forward your love.

give
beyond your years


HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

A message from Hawai'i Community Foundation on behalf of nonprofit organizations serving the islands.
Learn more at HawaiiCommunityFoundation.org/Legacy or ask your professional advisor.



HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

HCF Website Home Page

[HOME](#) [ABOUT](#) [CONTACT](#) [NEWS](#) [GIVE](#)

[CLIENTS](#) [PROFESSIONAL ADVISORS](#) [STUDENTS](#) [NONPROFITS](#)



HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

INVESTING

In Community Wellbeing

STRENGTHENING

Hawaii's Communities

LEARNING

For Greater Impact

GRANTS & SCHOLARSHIPS

For Community Causes & Students

give
beyond your years

ON BEHALF OF HAWAII'S COMMUNITY NONPROFITS

[LEARN HOW »](#)



Nonprofit Organizations Participating in the Hawai'i Legacy Campaign

Aloha Council Boy Scouts of America
ALS Association, Golden West Chapter
Alzheimer's Association
American Cancer Society
American Red Cross Hawaii
Assets School
Ballet Hawaii
Bishop Museum
Boys and Girls Club of Hawaii
Catholic Charities Hawai'i
Central Union Church
Chaminade University
Child & Family Services
Diamond Head Theatre
Domestic Violence Action Center
Easter Seals Hawaii
East-West Center Foundation
Family Programs Hawaii
Friends of Iolani Palace
Friends of the Children's Justice Center

Girls Scouts of Hawai'i
Habitat for Humanity – Maui
Hale Makua Health Services
Hale Na'au Pono
Hanahau'oli School
Hawaii Alliance for Progressive Action
Hawaii Autism Foundation
Hawaii Foodbank
Hawaii LGBT Legacy Foundation
Hawaii Literacy
Hawaii Opera Theatre
Hawaii Pacific Health
Hawaii Pacific University
Hawaii Preparatory Academy
Hawaii Public Radio
Hawaii State Bar Foundation
Hawaii Symphony Orchestra
Hawaii Theatre Center
Hawaii Wildlife Center
Hawaii Youth Symphony
Hawaiian Humane Society

Hawaiian Islands Land Trust
Hawaiian Mission Houses
Hilo Medical Center Foundation
Historic Hawaii Foundation
Honolulu Habitat for Humanity
Honolulu Museum of Art
Honolulu Waldorf School
Hospice Hawaii
Hospice Maui
Hui No'eau
Institute for Human Services
Iolani School
Island School
J. Walter Cameron Center
Ka Lima O Maui
Kauai Hospice
KCAA Preschools of Hawai'i
Ke Ali'i Pauahi Foundation
Kuakini Foundation
La'a Kea Foundation



Nonprofit Organizations Participating in the Hawai'i Legacy Campaign

Manoa Valley Theatre

Maryknoll School

Maui Academy of Performing Arts (MAPA)

Maui Arts & Cultural Center

Maui Economic Development Board

Maui Historical Society

Maui Humane Society

Maui Memorial Medical Center Foundation

Maui Nui Botanical Gardens

Mid-Pacific Institute

Montessori Community School

National Kidney Foundation of HI

National Tropical Botanical Garden

North Kohala Community Resource Center

Pacific Buddhist Academy

Pacific Forum CSIS

Pacific Resources for Education and Learning

Palolo Chinese Home

Parents and Children Together (PACT)

Parker School

PBS Hawaii

Planned Parenthood Hawaii

Project Vision Hawaii

Punahou School

Rehab Hospital of the Pacific Foundation

Research Institute for Hawaii.USA

Samaritan Counseling Center Hawaii

Seabury Hall

Shriners Hospitals for Children - Honolulu

Special Olympics Hawaii

St. Anthony Junior-Senior High School

St. Francis Healthcare Foundation of Hawaii

St. Francis School

St. Peter's Episcopal Church

The Maui Farm

The Merwin Conservancy

The Nature Conservancy of Hawaii

The Outdoor Circle

The Salvation Army Hawaii

The St. Andrew's Schools

University of Hawai'i Foundation

USS Missouri Memorial Association

Waikiki Health Center

YMCA of Honolulu

YWCA of Kauai

YWCA of O'ahu



HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

Graphics for Web or Print



Questions? Contact Beth Kuch



Table Discussions

1. What's working well for your organization in securing legacy gift commitments?
2. What's not working for you and your organization in securing legacy gift commitments?



Report from the Field

Mary Beth Lohman
Waikiki Health Center

Christine Richardson
North Kohala Community Resource Center

David Rivers
Central Union Church



LOOK INSIDE
An inspiring
story of donor's
thoughtfulness

HOW TO HELP NEXT STEP SHELTER

a member of WAIKIKI HEALTH



Next Step Shelter staff displays donated shoes.

Waikiki Health's Next Step Shelter provides temporary, transitional shelter to families and individuals. With compassion, we work with people to assist them to move into permanent homes. You can visit the web link below to learn about Next Step's wish list: waikikihc.org/locations/nextstep

give

beyond your years

WAIKIKI HEALTH

LEAVE A LEGACY

Waikiki Health Planned Giving:

Please consider including a gift to Waikiki Health in your will or estate plan. A legacy gift allows you to continue to support our agency for future generations of patients to come. Please call Mary Beth Lohman, our Development Director at 808-791-9331 or mlohman@waikikihealth.org.

Waikiki Health CEO receives Social Work Award

Waikiki Health's CEO, Sheila Beckham, was named "Friend of Social Work" by the National Association of Social Workers (NASW) Hawaii Chapter. The annual award recognizes a person (not a social worker) who has continuously supported the profession of social worker or social work issues. According to Marc Gannon, VP of Community Impact at AUW, "Sheila is an exemplary 'Friend of Social Work' deserving recognition for her many years of selfless service to our community and our community's most vulnerable populations." The prestigious award was presented at the NASW's annual Social Work Awards Dinner on March 11 at the Hale Koa.

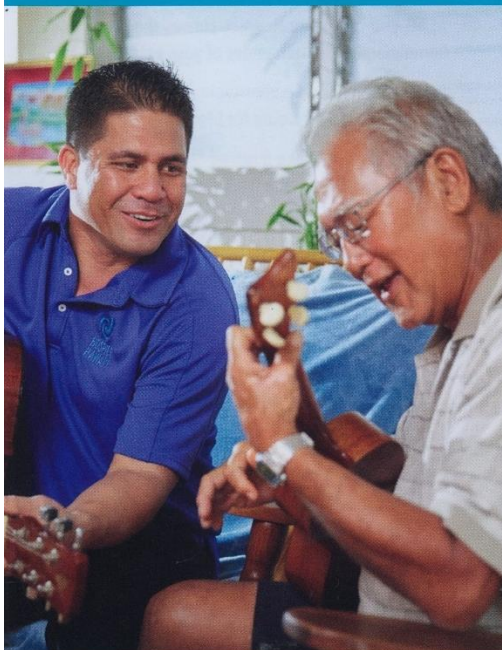




BRING HOPE • REDUCE FEARS • IMPACT LIVES

HOSPICE  HAWAII

GIVE BEYOND YOUR YEARS
LEAVE A LEGACY GIFT



Create your own legacy with a bequest
or other deferred gift to Hospice Hawaii,
and you'll ensure compassionate
end-of-life care will be available to
all well into the future.

No matter your age, you can create a legacy

- ☑ At 30, you can include Hospice Hawaii as a contingent beneficiary in your will
- ☑ At 40, you can designate Hospice Hawaii as a beneficiary of your IRA or 401(k)
- ☑ At 50, you can add Hospice Hawaii as a beneficiary of your life insurance policy
- ☑ At 60, you can name Hospice Hawaii the beneficiary of the remainder of your estate
- ☑ At 70, you can fund a charitable gift annuity or trust and receive income for life
- ☑ At 70½, you can make a tax-advantaged gift to Hospice Hawaii using a traditional or Roth IRA
- ☑ At 80, you can give Hospice Hawaii your home while continuing to live in it for your lifetime

Since 1979, Hospice Hawaii has been helping patients live their end-of-life journey with dignity and comfort and choose how they want to live for as long as possible. We help patients and their families face this transition with hope and without fear, surrounded by unconditional love.

give
beyond your years
Please consider a legacy gift
to Hospice Hawaii

Hospice Hawaii is pleased to be a Legacy Partner with the Hawaii Community Foundation in its Hawaii Legacy Giving Campaign.

To learn more, please contact us at
(808) 791-8067 or development@hospicehawaii.org
Or visit our website: www.hospicehawaii.org

Mahalo for your consideration!



Giving

Arts education should be fundamental. It should be woven through the entire curriculum. The cognitive skills of artists are some of the most important cognitive skills today.

Daniel Pink, author, "A Whole New Mind"

To reach its goals, the Honolulu Waldorf School relies upon the support and involvement of our entire community-- board members, faculty and staff, parents, grandparents, alumni, friends, and community members--through a coordinated series of fundraising activities. Every contributor is an important stakeholder in this unique community that nurtures our children so completely. Your philanthropic participation is essential to making a difference in the life of a child!



give
beyond your years


Honolulu Waldorf School
LEAVE A LEGACY

Honolulu Waldorf School
Please consider including a gift to Honolulu Waldorf School in your will or estate plan. A legacy gift allows you to continue to support our school for future generations of students. Please call Angie Golis-Yamamoto, Director of Development at (808) 792-4554 or email angie@honoluluwaldorf.org.



Report from Donors

Sara Miura

Lawrence Rodriguez

Jean Rolles



HAWAII COMMUNITY FOUNDATION
Amplify the Power of Giving

USE THE WEBSITE:

HAWAIICOMMUNITYFOUNDATION.ORG

TAKE ADVANTAGE OF TRAININGS:

NOVEMBER 16, 2016 – NATIONAL PHILANTHROPY DAY

AFP ALOHA CHAPTER

MARCH 9, 2017 (TENTATIVE) – JAY FROST

HAWAII GIFT PLANNING COUNCIL & HCF

MORE TO COME IN 2017 ACROSS THE STATE



PARTNERS

SHARE FEEDBACK

(CALL US AND/OR SPEAK WITH PATTI, MARTHA, KAWENA TODAY)

SHARE PROGRESS

(WE'LL BE ASKING FOR 2016 NUMBERS IN JANUARY)

MAHALO!