



# The Spoke

April 5th, 2017

Rotary



ding. Next President **Jon McLeod** convened the meeting. **Jim Horein** eschewed the “corporate invocation” and offered his inspirational moment.

The “Heavy from Youngstown” aka **Vince Modarelli** led the Pledge of Allegiance and **Joe Murgalo** was too far away to read the Four Way Test successfully.

Song Leader **Wayne Hemstead** led us in *Happy Trails* and dedicated it to the Rotary Regulars who are returning to their northern home. The song was written by Dale Evans and was the theme song of Roy Rogers and Dale for their radio and TV shows of yesteryear.



Mark Generales and Bob Lombardo confer at the Nautical Flea Market.

**Bobbi Bird** offered a Rotary Minute, exhorting us to attend the RI Convention in Atlanta. She described the “fun” activities that will be available.

Jon reminded of the District Assembly on April 22 in Sarasota. This program is highly recommended for anyone in the club’s executive group.

**Chuck Spears** rose to offer \$100 tickets for the New Horizons new car raffle. The drawing will be April 17th at a Miracle game.

**Adam Botana**, chair of the Reverse Raffle, tells us that he has 100 unallocated tickets that need to be sold.



**Bob Lombardo** rose to ask for some additional volunteers for helping with parking at the Nautical Flea Market. He is offering an event t-shirt and temporary use of a badge and portable radio for workers.

Thanks to members, **Jon McLeod, Brad Pitrowski, Carrie Reynolds, Wendy Arsenault, Bob Rosier, Adam Botana, Bob Gillette,** and **Bob Lombardo** who participated in the advertising supplement to the News-Press and Naples Daily News.



Vince Modarelli was Sergeant-at-Arms for the day. He introduced our guest and checked for pins and badges. Vince organized a standing *Happy Birthday to You* performance for **Jason Dolle**.



## Ed Smith SWFL Estate Planning



**Marjorie Rubacky** introduced our speaker **Ed Smith**, founder and managing member of South-west Florida Estate Planning, a law firm committed to providing clients with sound guidance and trusted counsel on all matters relating to estate planning and elder law. “As an estate planning and elder law attorney, I help my clients navigate and plan for life’s inevitable and unexpected events. I help ensure your goals are realized, your risks are minimized, and provide you with that which has no price – peace of mind.”

With a commitment to service, Ed was awarded a four-year Army ROTC scholarship to college in preparation to become a United States Army Officer. However, before his senior year, during train-

ing at Fort Lewis, Washington, he was medically disqualified due to a congenital malformation of his hands. With the ability to serve our country extinguished, he searched for new ways to serve our community.

He spent two years as a volunteer in Francis Corps, assisting those in need here in the states as well as deaf children in Costa Rica, becoming fluent in Spanish and proficient in sign language while in Latin America.

After returning from service in the Francis Corps, he earned his law degree from Ave Maria School of Law, where he was president of the Moot Court Board. He also participated in the Public Service Fellows Program at the Legal Aid Service of Collier County, helping underserved populations get legal representation and counsel they needed to protect their rights and preserve their families.

He is the current president of the **Foundation for Developmentally Disabled** in Naples, and currently serves as chair of Leadership Bonita.

Ed gave us an overview of the **ABLE** program, the **Achieving a Better Life Experience Act** that allows individuals with disabilities and their family and friends to save for future expenses, like popular Roth IRA and 529 college savings plans, while maintaining government benefits.

He also described the use of **third-party special needs trusts** to benefit a person with special needs. Commonly, family members create a trust for a loved one with special needs and leave property in the trust through their estate plan (their will, trust, life insurance, or other beneficiary designation).

The trusts are designed to manage resources for a person with special needs so that the beneficiary can still qualify for public benefits like Supplemental Security Income (SSI) and Medicaid. Third-party special needs trusts, as the name implies, are funded with assets that never belonged to the trust beneficiary, and they provide several advantages over the other forms of trusts.

These trusts are typically designed as part of the donor's estate plan to receive gifts that can help a family member with special needs while the donor is still living and to manage an inheritance for the person with special needs when the donor dies.

Ed is currently president of the Foundation for the Developmentally Disabled. FDD is in its 35th year and has more than 300 members. The major focus areas of the FDD are:

- Advocating for the rights and needs of citizens with developmental disabilities
- Increasing community awareness of the unique worth of disabled persons
- Providing educational, social and recreational opportunities for clients

- Serving as a support group for families of persons with disabilities
- Seeking quality, affordable housing solutions for persons with developmental disabilities
- Facilitating employment opportunities in the community for persons with developmental disabilities.

The FDD has founded Trailblazer Academy, a structured program for individuals 18 and older with intellectual and developmental disabilities. This FDD program provides an opportunity for structured, daily vocational training at various job locations, fitness and recreational activities, nutrition education and independent living skills.



## Upcoming Events

Friday, April 7th, 5:30 - 8:30 PM. **Kickoff Dinner Walk for Water.** Artichoke & Co. \$35/pp cash or check.

Saturday, April 8th, 8:30 - 10:30 am. Third Annual **Walk for Water.** Bonita Springs YMCA.

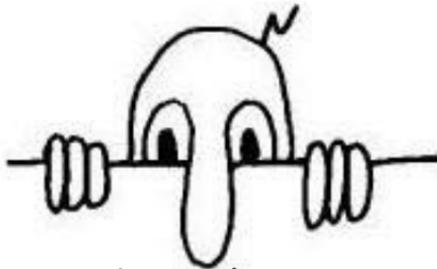
Saturday April 22, 8:30 am. **District Assembly.** Port Charlotte. Training for Secretaries, Treasurers, and a Grants Seminar. All Rotarians invited.

Saturday, April 29th, 6 pm. 21st Annual **Reverse Raffle.** St John the Evangelist.

May 18-21 **District 6960 Conference.** Hyatt Regency Sarasota.

**This Week**

**Ed Ludemann  
Inner Workings of the FBI**



50/50 \$1,875±

30 Cards

# Jon McLeod drew the 5♣ for \$5



The 50/50 is \$1,875±

*Birthdays*

**Jim O'Leary April 4**

## **Rotary Sings: Don't Fence Me In**

Oh, give me land, lots of land  
under starry skies above  
Don't fence me in  
Let me ride through the  
wide open country that I love  
Don't fence me in

Let me be by myself  
in the evenin' breeze  
And listen to the murmur  
of the cottonwood trees  
Send me off forever  
but I ask you please  
Don't fence me in

## **This Morning's Invocation**

Almighty God, we thank you for life and all its components, both good and adverse, because through both we are strengthened.

We ask for wisdom and strength not our own in order to make our citizenship and our professional endeavors worthy examples of life lived with integrity and compassion.

We intercede for members of this and other clubs who are experiencing adversity of any kind. Sustain them by your grace and power. May they be uplifted and encouraged by the support of their colleagues and friends.

We offer thanks for the food and purposeful fellowship received here. We are grateful for the happy privilege of just being here. Amen

## **Rotary International President**

**John F. Germ**  
Rotary Club of Chattanooga, TN

## **District 6960 Governor**

**Ladd Waldo**  
The Rotary Club of Lakewood Ranch

## **Area 3 Assistant Governor**

**Sally Smith**  
The Rotary Club of Estero

## **2016-2017 Club Officers**

<b>President</b>	<b>Steven Slachta</b>
<b>President-Elect</b>	<b>Jon McLeod</b>
<b>Secretary</b>	<b>Claudie Delgado- Feeney</b>
<b>Treasurer</b>	<b>Bob Lombardo</b>
<b>Sergeant-at-Arms</b>	<b>Roger Brunswick</b>
<b>Asst. Sgt-at-Arms</b>	<b>Bill Banfield</b>

## **Members of the Board**

**Tom Briers, Steven Slachta, Jon  
McLeod, Claudie Delgado-Feeney**

### **2014-2017**

**Frank Mazzeo, Peter O'Flinn,  
Susan Schmitt**

### **2015-2018**

**Adam Botana, Joe Murgalo,  
Jon Shaw**

### **2016-2019**

**Bob Lombardo, Kae Moore,  
Gary Price**

## **Trustees of The Foundation of The Rotary Club of Bonita Springs**

**Jim Dati, President; Stephanie  
Kissinger, Secretary; Richard Garner,  
Treasurer; Jason Dolle, Sandy  
Hemstead, Ed Houck, Mark McCaw**  
Trustees



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**Scott Gerrish** issue editor.