



# THE TROPICAL BULLDOG

VOL. VIII NO. II

*The Voice of the Yale Club of Southwest Florida*

Fall 2006

## President's Message

*By Sam Cooley '53, President*

Welcome back! I hope the summer was enjoyable for all and that you are looking forward, as I am, to another wonderful season in Southwest Florida.

We have a number of special events lined up, which I hope you will be able to attend. After being forced to cancel because of Wilma last year, Robin and Tom Wheeler again graciously hosted the Welcome Back Party on November 6<sup>th</sup>. The annual meeting of Members and Trustees was held at noon on November 9<sup>th</sup> at The Club at Pelican Bay. The Yale-Harvard Game was broadcast at the Naples Beach Hotel on November 18<sup>th</sup>, with a great win by Yale over Harvard. Our festive holiday party is scheduled for December 13<sup>th</sup> at U.S. Trust.

Back by popular demand will be a visit and tour of the fantastic Collier car collection. If you have never seen these classic cars, be sure to come. There are so many unique vehicles that even those of us who will be seeing them again will be equally enthralled.

Our H-Y-P Financial Seminar on February 6<sup>th</sup> will be hosted by Northern Trust at their Park Shore office. The bank promises to have some excellent speakers who will discuss the state of financial markets in light of current political and economic developments.

This season our Lecture Series, sponsored by Northern Trust for the benefit of our scholarship fund, features two distinguished Yale professors. On February 27<sup>th</sup> Peter Salovey, dean of Yale College, will update us on the Yale scene. On March 29<sup>th</sup> we will hear from Minh Luong, Assistant Director of International Securities Studies and a terrorism and security expert.

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*Trustees of The Yale Club*

## Minutes of The Annual Meeting of Members

*By Torrey Foster '56, Secretary*

The Annual Meeting of Members of the Yale Club of Southwest Florida was held on November 9, 2006 at The Club at Pelican Bay pursuant to notice duly sent to all members. The meeting was called to order by President Cooley '53 at 12:18 PM and Secretary Foster '56 noted that the Members present constituted a quorum for the transaction of business.

On motion duly made and seconded the reading of the minutes of the 2005 Annual Meeting of Members was waived and approved as filed in the corporate records.

The President's report was brief and began with the acknowledgment and thanks for Jeri Bush's outstanding performance as the new Executive Secretary this past year during an especially trying time for her as she battled her cancer disease. It appears that her cancer may be in remission.

Cooley also thanked Tom and Robin Wheeler for a delightful Welcome Back party for the Club. The final item for his report was the introduction of new members.

Treasurer Foster presented the financial report for the year. He briefly reviewed the principle items of income and expenses indicating that the Club is in good financial shape with a September 30, 2006 year end balance of \$2,939 in the operating account and an Endowment Fund balance of \$149,094. He then presented an Unincorporated Association Resolution requested by Northern Trust Securities to legalize our account with the bank. On motion duly made and seconded, the resolution was approved and Torrey Foster and Robert Wenzel were authorized to represent the Club on the account.

Jay Gelinas, retired faculty, and Vice President for Activities, highlighted upcoming events with special emphasis on the Yale v. Harvard football telecast, the Holiday Party, the Frank '55 and Sue Moore slide show on birds in Danali National Park, and the Collier Car Museum event.

In the absence of Tom Mackelfresh, Cooley presented a report on the activities of the Alumni Schools Committee. For the year 2005-2006 Yale had 23 applicants from the area of which 2 matriculated in the Freshman class, Dara Zyburo of Naples and Roger Kim of Ft. Myers.

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*The Tropical Bulldog* is published three times a year if the editors can find enough material, true or imagined, to bring to its readers' attention. Articles are gratefully accepted (no fees paid).

**First Managing Editor:** Torrey Foster '56  
**Editorial Advisor:** Bob Wenzel '53E  
**Contributing Editors:** Sam Cooley '53  
 Terry Upson '60  
 Bob Wenzel '53E  
**Photographer:** Torrey Foster '56  
**Production:** Kristi Foster

Visit our website: <http://www.yaleclubswfl.org>

## Minutes of the Annual Meeting of Trustees

By Torrey Foster '56, Secretary

The Annual Meeting of Trustees of the Yale Club of Southwest Florida was called to order by President Cooley '53 following the conclusion of the Annual Meeting of Members. Secretary Foster '56 noted that a quorum was present.

Trustees present were: Dick Bennett '52, Bob Bennett '44, Pete Broadbent '47E, Jim Brown '56, Ken Bruce '53E, Bill Carpenter '54, Sam Cooley '53, Marian E. Dolan, '89MMA, '94DMA, Barie Fez-Barrington '68M.Arch, Torrey Foster '56, Ted Gault '54MDiv, Jay Gelinis, Faculty, Dick Harris '54, Bob Hattermer, '53E, Richard Molloy '94MPPM, Frank Moore '55, Adelaide M. Spanton, Bob Wenzel '53E, and Tom Wheeler '58.

There was presented a slate of officers for election for the year 2006-2007 to take effect at this meeting. After a discussion and on motion duly made and seconded, the slate was unanimously elected as follows:

Samuel P. Cooley '53	President
Donald R. William '53	President-elect
Robert C. Bennett '44	V.P. Sponsorship
Rev. Edwin S. Gault '54MDiv	V.P. Fort Myers Area
George O. Gelinis, Faculty	V.P. Activities
Richard Molloy '94MPPM	V.P. Membership
J. Thomas Mackelfresh '51	V.P. Alumni Schools Comm.
Marian E. Dolan '94DMA	V.P. AYA
Robert E. Wenzel '53E	V.P. Endowment
Torrey N. Foster '56	Secretary & Treasurer

President Cooley then commented on the excellent work that Jeri Bush has done for the Club as its Executive Secretary. He recommended a bonus of \$500 for her, and after a discussion, and on motion duly made and seconded, the recommendation was approved.

President Cooley led a discussion on how to reach out for new members and well as to publicize the Club to the community.

There being no further business to come before the meeting, on motion duly made and seconded, the meeting adjourned.

## Meeting of Members, *continued from page 1*

In May the Club gave out 12 book awards and this past fall participated in the College Night in Naples. In the new admission cycle, 8 students have applied for early admission. It was also noted that there were 21,101 applicants to the class of 2010, 1878 were sent admit notices and 1,319 accepted. Public schools account for 54.4% of the class and non-public is 45.6%. 162 applicants have a Yale affiliation.

Bob Wenzel '53, Vice President Endowment, reported on the Club's Endowment Fund highlighting the increase of the fund by over \$40,000 with nearly \$10,000 appreciation (9%) on the Club's twelve funds. and our contribution to the University's scholarship fund of \$6,000. He gave special recognition to Ann Helmsderfer for her very generous contribution of \$25,000 to establish the first individually named Memorial Fund in the name of her husband, John Helmsderfer '43. 94 members contributed \$5,935 to the Endowment Fund.

There was no report from Terry Upson '60 Vice President AYA since he was in New Haven attending the annual AYA Assembly. Upson informed Cooley that it was time to elect a new representative to the AYA and new member Marian Dolan '94 DMA volunteered. She was unanimously elected by the membership.

Richard Molloy '94 MPPM, Vice President Membership, reported that the Club has 195 members, noting that the Club lost 9 members during the year but also gained 9 new members. More emphasis is being placed on widow members and there are no dues for them.

Bob Bennett '44, Vice President Sponsorship, reported that Blauch & Associates has again agreed to sponsor our Membership Directory with a \$1,000 contribution.

The Fort Myers report was presented by Ted Gault '54 MDiv. In addition to the monthly luncheons at the Royal Palm Yacht Club, the group enjoyed several special events during the past year.

Sam Cooley presented the AYA Outstanding Service Award to Tom Wheeler '58, highlighting his many contributions to the Club when he was President as well as subsequently with the Welcome Back Party this fall

The Nominating Committee, chaired by Bob Wenzel '53, submitted a slate of Trustees for election to the Board for a term of one year. The slate included all current Trustees, except Jay Powers '64, who is resigning to move out of town, and three new Trustees: Barie Fez-Barrington '68M.Arch, Adelaide Spanton, widow, and Marian Dolan '94DMA. After a discussion, on motion duly made and seconded, the slate was elected.

There being no further business to come before the meeting, on motion duly made and seconded the meeting adjourned.

## New Trustees Join Yale Club Board

Two active members and one new member elected at Annual Meeting of Members



L-R: Adelaide M. Spanton, Barie Fez-Barrington '68M.Arch, Marian E. Dolan, '89MMA, '94DMA

### Barie Fez-Barrington '68M.Arch

Barie Fez-Barrington was born in New York City where he attended Christopher Columbus High School and played tuba in the band. He received his BA in Interior Design from Pratt Institute in 1962 and a Masters Degree in Architecture from Yale in 1968.

His career includes working as an architect and project manager for the Gulf Oil Corporation and serving as a professor at Texas A&M University. He worked twenty years as a consultant in Saudi Arabia, including work for ARAMCO and for five years as Professor of Architecture at King Faisal University. He was founder and President of the American Institute of Architects, Middle East (AIG/ME).

Barie most recently worked his profession as a Plans Examiner in the Department of Development Services for Lee County, having retired in July of this year. He has also been teaching interior design at Edison Community College. He is a pastor for the Assemblies of God.

Barie has been married for forty years to Christina who was born in Leipzig, Germany where she studied Comparative Religion at Leipzig University. She later studied Fine Arts at Columbia University. Barie is also an ordained Assemblies of God pastor. He and Christina use to conduct an underground Christian mission in Saudi Arabia. Today they are writing a book of their time and experience in that Kingdom.

### Marian E. Dolan, '89MMA, '94DMA

Marian is a graduate with honors from Sweet Briar College; she holds an M.A. in musicology from Boston University, and an M.M.A. and D.M.A. from Yale University School of Music where she received the university's first choral conducting doctorate granted to a woman. She is the founding director of

the Yale Summer Chorus, served as a professor of choral conducting and church music at Emory University, was Director of Choral-Vocal Studies at Bryn Mawr and Haverford Colleges, and conducted the Singing Statesmen at the University of Wisconsin-Eau Claire.

Choirs under Marian's direction have sung at American Choral Directors (ACDA) conventions as well as on National Public Radio and on Public Broadcasting System broadcasts. She has also lectured and conducted at the Tampere Conservatory (Finland) and The Asian Institute of Liturgy and Music (Philippines), and coordinated choral conferences/workshops in Sweden, Germany, and Estonia. Marian has worked with the Atlanta Baroque Orchestra, Concerto Soloists of Philadelphia, and members of the Atlanta Symphony Orchestra.

Marian writes extensively for various publications, including the International Federation for Choral Music *Cantemus* and is Series Editor of the international sacred choral collections *Let the Peoples Sing* for Augsburg-Fortress Press. She is currently Secretary of the Multicultural & Ethnic Commission of the International Federation for Choral Music, as well as having served in leadership positions in a variety of choral organizations.

### Adelaide M. Spanton

Adelaide was born and raised in Ridgewood, New Jersey. After high school she went to the Juilliard School of Music in New York City majoring in voice as well as studying piano. Following graduation from Juilliard, Adelaide sang professionally in New York and Chicago until 1955.

Her first husband was Peter Sipp and they had a son and daughter. He was an executive with the Kellogg Company, and they lived in Glen Rock, New Jersey; Hinsdale, Illinois; and Leawood, Kansas where Peter was managing Kellogg's plants. After Peter's death, she married Bill Spanton '39, '42LLB in 1997, and this was her introduction to the Yale Club in Naples.

Adelaide is active in her church, Naples United Church of Christ, and is an active volunteer in the Bargain Box, a resell-it shop for the church. Adelaide will be active in recruiting and developing programs for widow members of the Yale Club.



**Sam Cooley '53 presented the AYA Outstanding Service Award to Tom Wheeler '58**

## Yale Club Planning Another Visit to Collier Auto Collection

MARK YOUR CALENDAR FOR JANUARY 17, 2007.

The Club is planning another cocktail party at Miles Collier's fabulous collection of antique, vintage and classic cars. Our first visit two years ago was a huge success with 150 members and guests attending. If you missed it then, you won't want to miss it again. Even if you were there, you probably will want to go again. Miles, Yale '69, has added a number of cars.

The party, limited to the first 150 members and guests, will be from 5:30 p.m. to 7:30 p.m. on Wednesday, January 17th next year and will cost \$25 per person including admission and hors d'oeuvres. Cash bar: spirits/wine/beer - \$5, soft drinks/soda water no charge. Guests will be very welcome, but please, no cameras.

Most of the cars, including some 50, formerly part of the famed Briggs Cunningham Museum in California, have a unique provenance. The collection of racing Porsches is considered by some to be superior to the Porsche factory's in Stuttgart. Miles has a world-famous collection of over 100 cars which is not open to the public and they are right here in our backyard. The Collier Auto Collection is located at 2500 Horseshoe Drive which is off Airport Road in the Collier Park of Commerce and just north of the Naples Airport.

Don't miss this privileged opportunity. An invitation for reservations will be mailed to you soon.

## President, *continued from page 1*

On April 5<sup>th</sup> you may enjoy the Naples Dinner Theater's production of *Showboat*, and later that month the traditional Ivy League Picnic will be held at the Naples Beach Hotel.

This year we plan to have speakers at our regular monthly lunches. In January Sue and Frank Moore, MD '55, will treat us to another of their fantastic slide shows, and in February we will hear from Lara Kunkler '91, manager of WZVN/ABC-7. In March we are hoping to again have Coach Siedlecki to tell us about Yale's football fortunes.

Your membership in the Yale Club not only helps sponsor these events but it also provides assistance to deserving Southwest Florida students attending Yale. We have a reputation for being an active, enthusiastic group, thanks to all of you who participate.

Remember, we are always on the lookout for new members so that these traditions and activities may be continued. Please renew your membership promptly for this year, and please encourage others to join. As you might imagine, most of us are retirees, so younger members would be particularly welcome. Please call or e-mail me with your thoughts and suggestions to make our Club even more vital and appealing.

## Good News About Getting Old

By Bob Wenzel '53E, VP Endowment

Who says Congress never does anything to help senior citizens? In August 2006 the Pension Protection Act was signed into law. This new law can help you save money on your charitable contributions, and may be of interest if you are over 70 ½.

Among the provisions of the Act, was one that allows individuals age 70 ½ years of age or older to make gifts directly from an IRA to charitable organizations without paying income taxes on the withdrawals. Normally, IRA funds are heavily taxed when you draw them out - at rates as high as 35%. However, the new law provides for withdrawals during two years only, 2006 and 2007. Following are the basic rules which apply:

- Donors must be past the age of 70 ½ and own a traditional or Roth IRA. Other retirement plans such as pensions, 401(k) plans and others are not eligible.
- Only the IRA Trustee can transfer gift amounts to a qualified organization. If IRA owners withdraw funds and then contribute them to a charity separately, amounts withdrawn will be included in the donor's gross income.
- No charitable deductions are allowed, but gift amounts will be excluded from donors' incomes.
- IRA gifts may not exceed \$100,000 and may be made only in 2006 and 2007. The "ceilings" on contribution deductions (50% of adjusted gross income for cash, 30% of AGI for long-term capital gain property) do not apply to IRA gifts.
- Transfers are not permitted to donor advised funds or "supporting organizations."
- IRA gifts cannot be made to "life income gift" arrangements.

The Yale Club of Southwest Florida is a 501(c)(3) organization and is qualified to receive gift amounts transferred by IRA Trustees, but you may want to check with your attorney or tax consultant if you have any questions about this new law.



## JANUARY MONTHLY MEETING

January 11, 2007

Don't miss Frank and Sue Moore's bird slide show from their recent trip to Denali National Park.



## Terry Upson '60 Attends AYA Assembly LXVI

By Terry Upson '60

AYA Assembly LXVI "For God, Country and for Yale" (The Importance of Service at Yale and Beyond) was held at New Haven November 9-11, 2006. The event was very well attended and was the first assembly hosted by recently appointed AYA Executive Director Mark Dollhopf '77.

The opening session set the format for the assembly - community service. We were informed that 60% of undergraduate students (3,000+) are involved in community service, 80% of which encompasses the larger community (i.e. outside Yale). Primarily through Dwight Hall, they have helped over 19 million people worldwide, many in Connecticut. Much of the remainder of the day was spent reviewing some of the service and research programs led and managed by Yale Students and University staff.

In the first session, delegates heard from students who have linked their service and research interests with academic pursuits. Engineering students explained their organization - Engineers Without Borders - which is currently undertaking water/sanitation projects in Honduras and Cameroon. We next heard from three Yale '07 MPH candidates about their community health assets initiative for the Latin community in Danbury, CT. where a number of students are involved assisting an ever growing Latino population in gaining access to health care. Finally a presentation was given on The Haven Free Clinic which is a student initiated and run primary care clinic in partnership with the Fair Haven Community Health Care Center in New Haven. The clinic provides the uninsured with free primary care, wellness education and assistance in obtaining health coverage.

The next session on University sponsored programs provided delegates with information about university sponsored service opportunities involving both staff and students which centered on three major initiatives. First is the Yale Alumni Community Service Fellowship sponsored by the AYA in 1989. The fellowship funds students who wish to undertake summer community service but can't afford to do so. The program provides \$2,800 plus housing and benefits for students and alumni designated worthwhile causes. Next, we heard from the Urban Resources Initiative of the School of Forestry and Environmental Studies (FES), a nonprofit organization formed to meet the natural resources needs of urban communities. The group partners with the City of New Haven, state and federal governments and local businesses on the revamping and care of the environmental burden of poor urban properties. Much of this is in New Haven's "Enterprise Zone" and engages people to resolve their own environmental issues. Lastly, we heard from the Yale Office of New Haven and State Affairs which

coordinates the effort to bring Yale resources to the City of New Haven. Yale is involved in assisting New Haven in many ways including public school students taking courses at Yale, summer youth programs on campus (600 children), Yale student tutors, many partnerships and the President's Public Service Fellowship to heighten the interface between Yale and New Haven nonprofits. Last summer 400 students worked in and with New Haven agencies earning \$400-500 per week under this fellowship program.

Delegates then attended a presentation by Douglas Rae, Richard Shely Professor of Management and Political Science. A specialist on business management and urban history and a member of the Yale faculty since 1967, Professor Rae has long combined his academic pursuits with community outreach including service in 1990 and 1991 as Chief Administrative Officer of the City of New Haven. Of interest was his comment that New Haven has reconciled itself to the fact that it will never be a manufacturing city, and the realization that Yale is essential to New Haven (without Yale, New Haven could only support a population of 40,000). This has drawn the two communities together to the benefit of both. In addition to other initiatives, the Yale faculty has substantial involvement in New Haven, especially poverty and how to address it.

The final session on community service was a panel presentation on economic justice by the Dwight Hall Center for Public Service and Social Justice. Founded by undergraduates as the Young Men's Christian Association in 1886, Dwight Hall has evolved into a secular and inclusive institution and remains the only independent, campus-based center for public service and social justice in the country whose programs are entirely student-run. During the program we were briefed on several ongoing initiatives. The Dwight Hall Urban Fellowship, initiated in 1994, is an academic-year program whereby 20 Yale undergraduates earn a stipend from Dwight Hall for work in New Haven community organizations or environmental agencies that address the challenges of urban living. Current placements include Neighborhood Housing Services, All Our Kin, Connecticut Voices for Children, Community Mediation and the City of New Haven Office of Economic Development. The Elmseed Enterprise Fund is a nonprofit microcredit organization that enables aspiring entrepreneurs to launch or expand promising small businesses by providing access to small loans and technical assistance. The Roosevelt Institution at Yale is a founding chapter of the Nation's first progressive think tank. Roosevelt connects students' ideas of how to improve public policies with those in government who can implement that change. The Undergraduate Organizing Committee, a member of the Dwight Hall Social



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## **AYA**, continued from page 5

Network, is a diverse group of undergraduates seeking to re-image and reshape Yale's role as an educator, employer, and public citizen, pushing the university to realize racial equality, economic justice, participatory democracy and responsible citizenship. Yale Hunger and Homelessness Action Project channels the efforts of student, community members and people who are homeless into combating hunger and homelessness, alleviating associated problems and improving the lives of those facing the fundamental issues of hunger and homelessness. Current initiatives include the twice yearly fast to help the homeless, the Friday operation of the downtown soup kitchen and administration of the New Haven Cares program which sells vouchers to students and community members to be given as an alternative to cash to people asking for money.

The day ended with an AYA information gathering session whereby AYA Executive Director Mark Dollhopf sought assistance from small groups with the AYA's strategic planning efforts. Among other topics discussed were the identification of interests of younger alumni, listing of special interest groups, reaching out to future alumni (students), engaging graduate students while at Yale, multiclass and club events, networking opportunities with alumni and communication.

The second and final session evolved around current events at Yale, innovations in club programming and a university update by President Levin. The Assembly concluded with the annual Yale Medal reception and dinner. The first session was on investments and the Yale endowment with Peter Ammon, Associate Director of Investments. Yale investment goals are to provide stable cash flow to the operating budget and to maintain the purchasing power of the endowment. The endowment prefers to be owners, not lenders, over the long term with diversity the key. The composition has changed markedly since 1985, an example being large capitalized stock which composed 85% of the portfolio in 1985 vs. 15% today. The role of the investment department today is to provide asset allocation and to identify and select active asset managers who continually add value. The endowment has produced an annualized return of 15.4% over the past 20 years with no down years since 1988. The endowment today is over \$18 billion and provides 34% (\$675 million) of net budgeted revenues of the University.

The next session was on the internationalization of Yale with Don Filer, Associate Secretary and Director of International Affairs. Created 3 years ago, the Department of International Affairs provides strategic support for the international activities at Yale which include brochures/videos in 11 different languages, an international website, international gathering and sharing information for 800 Yale activities and tour guides in seven different languages. 16% of today's Yale students are international (1770 from 108 countries); 4,000 are international scholars; 51 lan-

guages are taught and the university offers 1,600+ courses with international content. Yale is committed to provide all undergraduate students the opportunity to go abroad once in four years including the provision of financial aid. Additionally, the university has opened an international center to process and assist international students. Yale has three international goals: to prepare students for leadership and service in an increasingly independent world; to attract the most talented students and scholars to Yale from around the world; and to position Yale as a global university of consequence. An example is China where Yale is probably the most prominent of all foreign universities.

The last part of the day's formal session consisted of volunteer leadership breakouts by club, class or graduate school. The session on Yale clubs focused on creative event planning for membership. A number of topics were covered, namely monthly speakers, a better data base from New Haven, staggering the price of events by age groups, tie-ins with larger civic events and partnerships with other groups in the area to offer something special.

Always a highlight of the Assembly, President Levin '74PHD presented a university update to delegates major themes of which included:

Strengthening the Science Program. A new biology building has been designed and will be completed in 4 years and Sterling Chemistry Lab will be renovated in 5 years. In addition the Medical School has received a \$57 million grant from the National Institute of Health to support clinical research.

Expand the Arts. The art building has undergone comprehensive renovation and is about to reopen as is a new building for the sculpturing department. In the next 4 years the Art School will benefit from the biggest array of new support for any similar school in the world (over \$500 million).

Becoming Global. Yale aims to create enough international expertise so every student gets experience abroad (900 Yale students supported various summer activities abroad in 2006). The University has established work internships with a number of major cities abroad (London, Athens, Beijing included) where alumni have helped to make the work experience meaningful. Yale is building a new campus in Beijing which combines American and Chinese students living and learning together for a more meaningful experience. Finally, Yale has undertaken the novel role of providing leadership programs for foreign government officials (China, Japan, India).

Yale College. The University is offering a number of new courses facilitating the communication of science for BA candidates. Also, as Yale College now takes only 9% of applicants annually, the building of 2 new colleges is being considered to expand enrollment. This needs full vetting before it becomes reality.

School of Management. The first year curriculum has been reshaped and put in place this fall and applications for next year are up 45%.

*Continued, page 7*

## AYA *Continued*

Lectures on IPOD. Yale has initiated an IPOD site with Apple whereby a minimum of four new lectures by both well known and new faculty can be downloaded. The new service will begin in January with more online content and add-ons.

The Assembly concluded with the annual Yale Medal reception and dinner. This years' medalists were Philip G. Boyle '71; Hon. Howard M. Holtzmann '42, '47JD; Frederick R. Mayer '50; Howard H. Newman '69, '69MA; and Deborah Rose '72, '77MPH, '89PhD.

In summary, this was an excellent Assembly and participants left with the impression that the University is being well run as an institution of higher learning and as a business and has an excellent future.

## Yale Club Endowment Fund Reaches New High!

By Bob Wenzel '53E, VP Endowment

Thanks to the generosity of Yale Club members, our Endowment Fund for the fiscal year 2005-2006, which began with a big increase over the previous year, continued with another big increase. We started on October 1, 2005 with \$109,623 in our Fund and finished the year on September 30, 2006 with \$149,093.

That significant increase resulted in part from endowment contributions made with annual dues, from contributions generated by our Northern Trust sponsored Lecture Series, and by a major contribution from Ann Helmsderfer, widow of John R. Helmsderfer '43. Additionally, we benefited from a 9% increase in our portfolio which is invested at Northern Trust.

As a result of all this, we were able to increase our annual gift to Yale for financial aid to students from Southwest Florida. The more we give, the less Yale has to provide. In the past, our gifts to Yale have assisted as many as six students in one year. Right now we are assisting two, one in the class of '07 and one in '10.

Mrs. Helmsderfer's gift of \$25,000 created our first in what we hope will be a number of *Individually Named In Memoriam Scholarship Funds* in the name of a deceased member, a foundation or a trust. This amount, which may be added to at any time and which is tax-deductible, establishes an individual scholarship fund. Each year in perpetuity, the proceeds of this Fund will contribute to Yale University in the individual name in support of scholarship. Please call me at 239-591-1690 if you have questions about this special gift program.

Our Endowment plans for the new fiscal year are much the same as last. You already should have received a 2007 application for membership dues which includes a solicitation for a tax-deductible Endowment contribution. We hope you will help. Note on the Season Activities listing which was attached that Northern is again sponsoring our Lecture Series on February 27 and March 29, 2007. These are two outstanding Yale speakers you won't want to miss. 80% of the admission fee for the speakers and cocktail reception is tax-deductible and supports the Yale Club scholarship efforts. I look forward to seeing you there.

### We Thank Our Endowment Fund Contributors for Fiscal Year 2005-2006

George Abrams '55	Peter Kapetan '45WE
Rita Anderson	Bill Kettering '49E
John Arena '58	Maxwell Lai '50
Willis Arndt '54	Art Linzell '
John Aymar '60	Bernie Lublin '56
Allan Bekanstin '49	Tom Mackelfresh '51
Dick Bennett '52	Joel Magyer '63
Thea Berggren '74MFA	Tom Melvin '65
Watson Bray '50	Richard Molloy '94MPPM
Pete Broadbent '47E	Monty Montanye '49
Charlie Brookes '49E	Harry Morgan '48
Jim Brown III '56	Charlie Morss '53
Ken Bruce '53 E	Mike O'Hearn '54
Roy Buchman '49	Bob Ortner '43S
Barb Cameron	Chrissie Paddock
Yolanda Cannon	Bernie Peck '36, '39LLB
Bill Carpenter '54	Andy Pocalyko '49
Steve Colgate '57	Dick Porell '54
Sam Cooley '53	Bob Potts '45W
Don Crepon '54 E	Jay Powers '64
Jack Davis '48E	Raj Rajasinghe '88
Joseph Donadio '66MD	John Rapp '58
Dick Eagan '61	Aino Roosma '57MS
John Foskett '41	Jerry Rubecky '48
Torrey Foster '56	Eric Rubenstein '04
Murray Freeman '49	Joe Sample '45
Malcolm Gambill '53E	John Sanders, Jr. '87
Jay Gelinis, Faculty	Connie Sartorio
George Gephart '50	Sam Scovil '45S
Dick Glowacki '54	Gary Simons '61E
George Gould '51	Herb Sleeper, Faculty
Bob Gunn '49	Ed Smith '53E
Jon Hamill '60	Katie Sproul '93MPPM
Mike Hanson '65	Fred Stratton '61E
Dick Harris '54	Bob Sullivan '53
Cub Harvey '51E	John Thomas '48
Bob Hattemer '53	Bob Todd '54
Denise Heinemann '82DPH	Rebecca Totaro '93MAR
Ann Helmsderfer	Bob Tucker '45WE
Scott Herstin '69	Terry Upson '60
Bill Hoffman '50	Joan Van Nest
Alan Horton '65	Barbara Wamelink
John Hough '50	Margaret Wenzel '58MD
Ray Houlihan '50	Bob Wenzel '53E
Jim Hullverson '50	Tom Wheeler '58
Carol Hunt	Don Williams '53
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## 2006 - 2007 SEASON ACTIVITIES

<u>DATE</u>	<u>EVENT</u>	<u>LOCATION</u>	<u>CHAIR</u>
Dec. 13, 2006	Holiday Party	U.S. Trust	Terry Upson
Jan 11, 2007	Frank & Sue Moore - Denali Bird Slide Show at Monthly Luncheon	The Club at Pelican Bay	Jay Gelinas
Jan 17, 2007	Collier Car Collection Tour & Cocktail Party	Collier Car Collection Museum	Don Williams
Feb. 6, 2007	HYP Financial Seminar	Northern Trust	Sam Cooley
Feb. 27, 2007	Lecture Series - Peter Salovey, Dean of Yale College	Northern Trust	TBA
Mar. 2007	Jack Siedlecki, Yale Football Coach	TBA	Pete Broadbent
Mar. 29, 2007	Lecture Series - Minh Loung, Yale Ass't Dir. Int'l Security Studies	Northern Trust	TBA
Apr. 12, 2007	Semi-annual Mtg. of Trustees	The Club at Pelican Bay	Sam Cooley
Apr 5, 2007	Naples Dinner Theater <i>Showboat</i>	Naples Dinner Theater	Dick Bennett
Apr 2007	Ivy League Picnic	Naples Beach Hotel	Bob Hattemer

**Naples Monthly Luncheons** on the 2<sup>nd</sup> Thursday of the month at The Club at Pelican Bay.  
Reservations are mandatory by the preceding Tuesday - No exceptions..  
 Please call Jeri Bush (348-9476) or e-mail: [Jhbush47@hotmail.com](mailto:Jhbush47@hotmail.com)

**Ft. Myers Monthly Luncheons** on the 4<sup>th</sup> Thursday of the month (except Dec. on the 3<sup>rd</sup> Thursday) at the Royal Palm Yacht Club  
 Call Ted Gault for reservations (481-9631)

## The Yale Club of Southwest Florida

P.O. Box 111267

Naples, FL 34108