



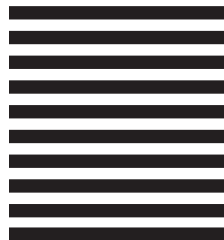
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## AN EXCITING NEW WAY TO GIVE TO JUSTIN-SIENA

**U**nder the Pension Protection Act of 2006, individuals aged 70½ or older can make lifetime gifts using funds from their IRAs without undesirable tax effects. The simple gifts allow donors to jump-start their legacies and witness the benefits of their generosity to Justin-Siena.

You may contribute funds this way if:

- You are age 70½ or older
- The gifts do not total more than \$100,000
- You make the gifts on or before Dec. 31, 2007
- You transfer funds directly from an IRA or Rollover IRA to a public charity, but not a supporting organization or donor advised fund.

Contact your IRA custodian to take advantage of this opportunity. It is wise to consult tax professionals before making a gift this way. If necessary, we can provide your IRA custodian with a "sample letter of transfer."



4026 Maher St. • Napa, CA 94558  
[www.justin-siena.com](http://www.justin-siena.com)

For more information, contact:

Joseph W. Bracco • Executive Director  
(707) 775-5703 • E-mail: [jbracco@justin-sienafoundation.org](mailto:jbracco@justin-sienafoundation.org)



JUSTIN-SIENA HIGH SCHOOL  
FOUNDATION

4026 Maher St. • Napa, CA 94558

## Legacy Circle

In recognition of your donation to Justin-Siena through your estate plan, you will become a member of Justin-Siena's Legacy Circle. Legacy Circle members are acknowledged in the school's annual report and invited to special events including the annual President's Circle Dinner. A Legacy Circle donor plaque is being developed for permanent display in a prominent location on campus.



JUSTIN-SIENA HIGH SCHOOL  
FOUNDATION



# Legacy

Circle News

HONORING DONORS AND INFORMING SUPPORTERS  
ABOUT GIFTS TO JUSTIN-SIENA

## GENERATIONS OF COMMITMENT INSPIRE NEW DODD SCHOLARSHIP

**T**hree generations totaling 15 members of the Dodd family have served or attended Justin-Siena High School over the past 40 years.

When the family's matriarch, Pat Dodd, died in the spring of 2006, the family knew that it wanted to establish a special scholarship to honor her and her husband, Bill Dodd Sr. and their dedication to and affection for Justin-Siena.

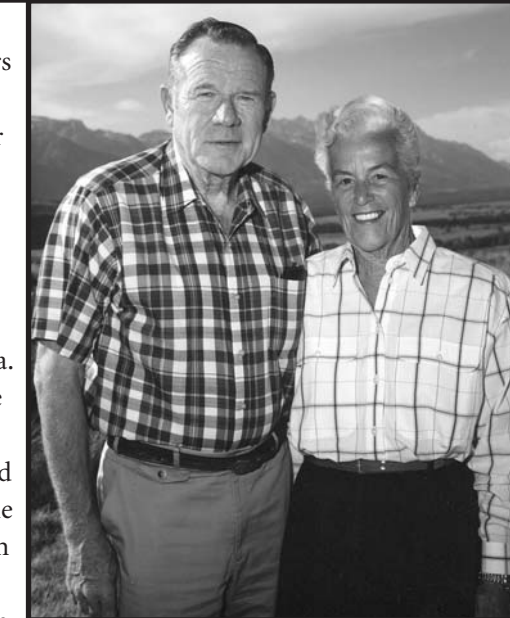
"We established this scholarship as a tribute to my parents' commitment to Justin-Siena," Bill Dodd Jr. says. "If they were alive today and knew they had created a legacy that will enable deserving students to attend Justin-Siena High School, it would please them very much!"

Pat Dodd served on the first school board in the early 1970s, and Bill Dodd Sr. was a founding director of the Justin-Siena Foundation. He was instrumental in starting the J/S 200 Club, the school's first fundraiser, and served as its chairman.

In 1974, as president of the Justin High Association (the original sports boosters club), Bill Dodd Sr. was one of the prime movers in the building of the original football stadium. All four Dodd sons (Steve, Bill Jr., Jim and John) graduated from Justin-Siena; Debby however, the only daughter of Bill Sr. and Pat, missed the opening of Justin-Siena by one year. Nine of 16 grandchildren have attended Justin-Siena; seven are graduates.

Pat and Bill Dodd Sr. had a deep affinity for the Justin-Siena community and were very active, as parents and grandparents, in their support—with time and resources.

Those interested in contributing to the Dodd Family Scholarship can send their donations to the Justin-Siena Foundation, 4026 Maher St., Napa, CA 94558.



Bill Sr. and Pat Dodd

## A NEWSLETTER FOCUSED ON DONORS LIKE YOU

Dear Friend:

We are pleased to share with you the first issue of the Justin-Siena Foundation newsletter, Legacy Circle News.

This newsletter is meant to honor our donors and to inform those who have a fondness for Justin-Siena about the many ways people support the school, such as through current gifts or bequests in their estate plans.

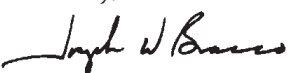
The Justin-Siena Foundation was established in 1972 to build and manage the Justin-Siena High School Endowment. The Foundation is determined to increase the endowment from \$3.1 million to \$20 million by 2020, primarily by encouraging charitable estate gifts.

I am pleased to inform you that all members of the Foundation's Board of Directors who have served at least a year have made a Legacy Circle gift commitment to Justin-Siena. I have also named Justin-Siena as a beneficiary of my estate plan.

This newsletter will focus on our donors like you, telling your stories and expressing our appreciation for your support. I believe that you may be seeing familiar faces from time to time and will find each issue filled with thought-provoking, useful and up-to-date financial and estate planning ideas.

Having you as a select supporter means so much to us. If we can be of assistance in any way as you consider further charitable giving, please let us know.

Sincerely,



Joseph W. Bracco  
Executive Director



## CREATE A NAMED FUND HONORING A LOVED ONE

You can perpetually memorialize a loved one who may have had a special relationship with Justin-Siena— an alumnus, revered teacher or alumni family, for example—by establishing an *endowed scholarship* through the Justin-Siena Foundation named in the loved one's honor.

You may establish the criteria for the selection of the scholarship recipient, in keeping with the mission of the school. Scholarship awards are based on the annual earnings derived from the donated funds. A minimum contribution of \$10,000 is required to establish a named endowed scholarship.

The assets of the scholarship are professionally managed and permanently maintained in the Foundation's endowment fund, with investment performance monitored by the Foundation's board of directors. The Foundation is currently managing the funds for 19 endowed scholarships. (See article on Dodd Scholarship in this issue.)

For further information, confidentially provided, contact Joe Bracco at [jbracco@justin-sienafoundation.org](mailto:jbracco@justin-sienafoundation.org).

## CONSIDER MAKING A CHARITABLE BEQUEST

Benefiting Justin-Siena High School will provide you with an enormous amount of satisfaction. How wonderful it is to know that after your death, your philanthropic goals will continue to live by making a gift through your will!

Many people consider a bequest the perfect way to make a gift. You can help a charitable organization in the future without using any of your assets today.



### Great Flexibility

A bequest lets you balance philanthropic goals with concerns that you may have about living expenses, future medical costs and loved ones. Because you're not actually making a gift today and giving the asset away irrevocably, you need not worry that you won't have enough to live on sometime in the future should you need the asset after all.

A bequest allows you the flexibility to use the asset if you need it. But at the same time, you become a part of the giving community of an organization by promising a gift in the future.

### How It Works

To make a bequest, you need a current will or revocable living trust. You can specify that the bequest be used for a certain purpose or you can make it an unrestricted gift. An unrestricted gift will be used where it is needed most. Designating your gift to the Justin-Siena Foundation Endowment Fund ensures that it will be a permanent resource to Justin-Siena.

Here is suggested bequest language for your attorney's review: "I give, devise, and bequeath to the Justin-Siena High School Foundation, located in Napa, California, the sum of \_\_\_\_\_ dollars (\$\_\_\_\_\_), OR \_\_\_\_\_ percent (\_\_\_\_%) of the rest, residue, and remainder of my estate OR the following described property: \_\_\_\_\_ for the benefit of its general purposes (or specify the program you wish to support)."

### To Make a Charitable Bequest:

- Determine if you need to update your will or revocable living trust.
- Select the charitable organization(s) you wish to benefit.
- Decide which purpose you wish to support, or whether your gift will be made as an unrestricted gift.
- Notify the charitable organization of your intention (unless you wish to remain anonymous), so its staff can thank you for your gift and keep you informed of its ongoing activities.



## Coming Soon

To the Justin-Siena Foundation Web site— a planned giving link with answers to your estate planning questions.

Visit [www.justin-siena.org](http://www.justin-siena.org) and click on "Foundation" and then click on "Planned Giving."

Fold in half and tape shut with clear tape. No staples.

## YES! I WOULD LIKE TO KNOW HOW TO UPDATE MY WILL AND BENEFIT JUSTIN-SIENA

- Please provide me with more information about wills and estate planning.
- I have a question. Please call me.  
Best time to call: \_\_\_\_\_ a.m./p.m.
- I have not previously informed you, but I have already included Justin-Siena High School in my estate plan through:
  - my will     a trust arrangement     an insurance policy
  - my retirement plan assets     other \_\_\_\_\_
- BONUS!** Please send me more information on how recent tax legislation provides new options for my IRA distributions.

\_\_\_\_\_  
Name (Please print)

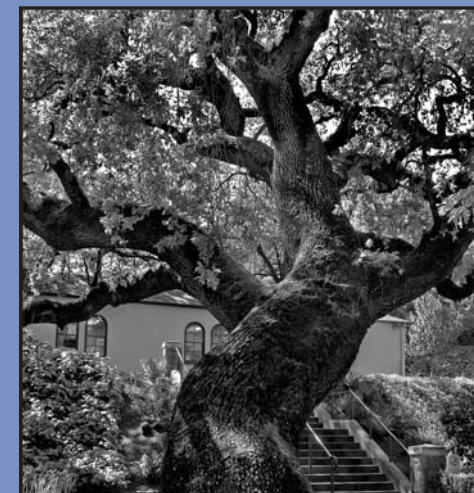
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Address

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City, State, ZIP

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Telephone

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E-mail

*This information is strictly confidential.*



### Board of Directors

- Tom Carey '86, *Chairperson*
- Del Britton
- Roger Carlson, M.D.
- Ed Farver
- Dennis Pedisich
- D.J. Smith
- Br. Robert Wickman, FSC, *ex officio*

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