



640  
HERITAGE PRESERVATION  
FOUNDATION  
*The Power of Preservation*

ISSUE 36 | MAY 2018

THE 640 REPORT



## Planning for Your Future: Financial and Medical Wisdom



*Guest Speaker Sara C. Stephens, Event Hostess Helene Ettelson & Guest Speaker Lisa Hutar.*

Recently, the 640 Heritage Preservation Foundation sponsored a seminar reviewing the most important documents you should have in your life. What should you have and why? The compelling discussion was presented from a financial and medical point of view, and the different challenges banks and hospitals face. The audience was so engaged they were sorry to see it end.

Two speakers provided enlightening and inspiring information: Lisa Hutar, Managing Director and Senior Financial Planner with First Republic Bank, and Sara Stephens, RN, founder and CEO of Sara C. Stephens Medical Advocacy and Planning.

Ms. Hutar noted at the outset that many of us, for a variety of reasons, neglect to meet with an attorney to draft these critical documents, complete them and then keep them up to date. She pointed out that if we do not take these steps, there can be confusion and dissension among our heirs, and our estates will be probated by the state where an attorney will be paid a percentage of the estate to handle this legal proceeding. Documents should be reviewed every ten years, if your life circumstances change (health decline, divorce), or on the retirement or death of your attorney.

The documents are:

- **Your Will.**
- **Living Trust.** Names a family member with financial savvy or an independent trustee to make financial decisions about your estate. Among other things, this prevents property in the trust from going through Probate Court.
- **Power of Attorney.** Your attorney can define this for you but basically a Power of Attorney can be drafted to “spring” into effect when certain events happen (e.g. if you become incapacitated), or “durable” where it becomes effective on the date signed.
- **Letter of Intent.** Ms. Hutar recommended that we each write a letter of intent to our heirs and executors outlining our wishes and any other information you want them to have. While not legally binding, such a letter can be invaluable to your loved ones.
- **Advance Health Care Directive.** With this document you select someone you trust to make health care decisions for you if you are unable, and it states your wishes for end of life care. This agent can be different than the trustee you name in your trust.

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# A Message from the President Barbara Kimport

After the recent Wine, Women and Financial Wisdom seminar that was so positively received by our attendees, I was reflecting on the public programs the 640 Heritage Preservation Foundation has produced over the past fifteen years. This was the 5<sup>th</sup> annual seminar founded by Helene Ettelson, Board Member and Elizabeth Pillsbury Society Chair and Member. Each one has conveyed critical information we all need for the preservation and planning of our financial and medical matters. The article on Page One of this issue outlines some of the most important messages conveyed by our speakers, Lisa Hutar of First Republic Bank and Sara Stephens, RN, founder and CEO of Sara C. Stephens Medical Advocacy and Planning. Our thanks to them and to Helene for an informative and inspiring presentation.

In the earlier years of the Foundation's work, two prominent women spoke to large gatherings about issues of historical and current interest. In 2008, Nina Totenberg, award-winning legal affairs correspondent for National Public Radio, spoke in conversation with Jan Yanehiro about the United States Supreme Court and how her career interests developed. Cokie Roberts, Emmy award-winning political commentator, spoke on Women, Then and Now in 2012, highlighting her work on the early mothers of our country.

Since 2014, the 640 Heritage Preservation Foundation has produced the annual Alice Ross Carey Memorial Lecture in partnership with San Francisco Heritage. The first lecture in 2014 was given by Anthea Hartig, California Historical Society Executive Director, on Alice Ross Carey and her work as a preservation architect. The topic of the 2015 lecture was on the California Historical Society's exhibition, "City Rising: San Francisco and the 1915 World's Fair," and the role of women in the planning and production the 1915 Pan Pacific International Exposition in San Francisco.

In 2016, Michael Corbett focused on his research work on the Bliss and Faville architectural firm and in 2017, a group of speakers reviewed grants made by San Francisco's Historic Preservation Fund Committee to protect San Francisco's architectural treasures. These lectures are attended by over 75 people annually and reported on in the publications of both San Francisco Heritage and the 640 Report sent to several thousand people. We will have information on the 2018 lecture in the next few months.

Also of public importance is the historical research undertaken about 640 Sutter and its architects by Michael Corbett, our lecture speaker in 2016. With the generosity of a family foundation, the Foundation has approved grants for a comprehensive research and writing project about Bliss & Faville, the architects of 640 Sutter Street and 601 Sutter Street (formerly a women's club and now the Marines' Memorial Club), and their work throughout the Bay Area. This work is expected to result in an academically published manuscript in the near future.

Finally of interest is the purchase of historic photo images and plates of 640 Sutter Street from Moulin Photo Studios.

I hope you've had an opportunity to attend one of these programs and enjoy the early photographs and information about 640 Sutter. It is a grand building and we are committed to preserving the house that women built for the years to come.

*Barbara Kimport*



The mission of the 640 Heritage Preservation Foundation is to preserve and celebrate the history, architecture, and heritage of women's athletic clubs in San Francisco, with particular reference to the Woman's Athletic Club of San Francisco, now known as the Metropolitan Club, through research, public education and funding activities.

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# Wine, Women, & Financial Wisdom

## A Financial Seminar for Women Given by Women



*Barbara Johnson and 640 Hertiage Preservation Foundation Director Misty Tyree.*



*Guest Speaker Sara. C. Stephens, Event Hostess Helene Ettelson & Guest Speaker Lisa Hutar.*



*640 Hertiage Preservation Foundation President Barbara Kimport.*



*Pat Ho & Sharon Woo.*



*Janet Lochner and 640 Hertiage Preservation Foundation Director Carol Ann Rogers.*



*Barbara Patton, Teta Collins & Heidi Kennedy.*



*640 Hertiage Preservation Foundation Treasurer Marie Berggren, Kathy Paul, Marilyn Brenner & Ruthie Conway.*

# Planning for Your Future: Financial and Medical Wisdom (cont'd.)

*Continued from page 1*

Ms. Stephens gave special emphasis to the Advance Health Care Directive. She encouraged us to talk with our individual doctor about our directive and give the doctor a copy of it. We should keep copies of the directive in our home in a convenient location (in the bedside table was suggested) and give a copy to each appointed agent. She also advised us to make a small card to keep with our driver's license and health insurance card that says our name, that we have an Advance Health Care Directive and the name and phone number of the agents who should be contacted.

· **Authorization for Release of Protected Health Information.** This legal form authorizes your health care provider (doctor and hospital) to release your medical information to those you designate. This should include the person(s) you have named to make health care decisions for you.

Finally, Ms. Stephens outlined the **California Physicians Orders for Life-Sustaining Treatment (POLST)**, a valid and legal physician order which complements the Advance Health Care Directive. You should have this document if you are 80 and older or if you have a serious illness. This document is very specific about what degree of medical care you want. Many keep a copy on their refrigerator and one in your bedside table drawer. Ambulance drivers know to look there if you are unable to speak because it needs to go to the hospital with you. This is also a document your doctor signs and should have in your medical file.

**POLST** forms are available online at [www.capolst.org](http://www.capolst.org). Michelle Mitchell, Director of the 640 Heritage Preservation Foundation, can also assist you in locating this form.

The speakers emphasized how important that it is we, as older adults, continue to have serious conversations with family not only about our final burial instructions but also about financial and medical plans as well as our desires pertaining to serious illness and death.

**VERY IMPORTANT:** Make sure to keep your papers UP TO DATE!!

*Wine, Women, and Financial Wisdom is an annual community service seminar. Our thanks and gratitude to its founder and producer, Helene Ettelson, 640 Heritage Preservation Foundation Board Member and Elizabeth Pillsbury Society Chair and Member.*

## Tax Law Changes on Philanthropy

Several aspects of the tax law passed at the end of 2017 (and taking effect in this tax year 2018) have changed, but you can still contribute and retain tax benefits. Your contributions to the 640 Heritage Preservation Foundation's mission to preserve the house that women built and to research and celebrate the history of women's athletic clubs in San Francisco are tax-deductible to the extent allowed by law.

When you contribute appreciated assets like stock, the double benefit continues. You avoid capital gains tax and receive an income tax deduction when you itemize deductions.

Good news for taxpayers over the age of 70½! Congress did not change the exclusion from income of up to \$100,000 per person, per year, for Individual Retirement Account (IRA) distributions which are given directly to charities. This is a great way for you to contribute in retirement and still enjoy this tax benefit.

Please do consult with your attorney and financial adviser when considering these potential philanthropic tax benefits. The 640 Heritage Preservation Foundation is a 501(c)(3) public benefit corporation as granted by the Internal Revenue Service in 2004.

# Heritage Fair



Plans are well underway for Heritage Fair 2018 taking place on Monday and Tuesday November 5-6. For those of you who attended the inaugural fair in 2014, we are pleased to announce that many of the most popular vendors from that event are returning. These include:

- \* **Barbara Arnett** with her beautiful hand-painted cashmere shawls
- \* **Carmel's Carmen Priolo Design's** European style jewelry
- \* **Charlotte Brody's** elegant designer clothing from New York
- \* **Chic by Design and Metro Man's** gifts
- \* **Designs by Georgina** featuring South Sea pearls, semi-precious stones and vintage collections
- \* **Kathy Kamei Designs'** hand-crafted Bali jewelry in silver and two-tone 18K gold
- \* **Muki Bolton Boutique's** exotic skin handbags and accessories
- \* **The Treasured Accessory's** wonderful "of the moment" jewelry

They will be joined by exciting new vendors of designer eyeglasses, stationery, art, specialty food items, cosmetics, and a wonderful array of gift possibilities for the holidays. We will feature these new vendors in a later communication so that you can make your shopping lists in advance!

We are also delighted to announce a terrific leadership team for the Heritage Fair. We are thrilled to have Gladys K. Mitchell as our Honorary Chair and Cathy Goodman as Founding Chair. Jo-Ann Rose takes on the role of Treasurer. Sponsor Chairs are Deihleen Claffey, Suzanne Muntzing Edwards and Peggy Mitchell. Hard at work planning a super fun Preview Party are Kaki Desautels and her committee of Ramsay Behnam, Susie Gilmartin, Trish Otstott and Linda Wiley. And the all-important position of Vendor Chair is held by Lynn Jacobs. Thank you to all of you who have contacted the Foundation Director to add your name to the list of event volunteers. As the fair dates approach, we will be contacting you to fill the many volunteer roles so necessary to the success of the fair.

Sponsor letters will be mailed in May. We hope that you will consider supporting the Heritage Fair by becoming a Sponsor and experiencing the Heritage Fair as a VIP. Individual tickets for the November 5<sup>th</sup> Preview Party and for the Shopping Day will be available for purchase in September. Start thinking now about which friends, business associates and family members you want to invite to join you at the November 6<sup>th</sup> shopping day which will run from 9 AM to 5 PM.

More news to follow. Watch your mailbox and your email inbox for fun and exciting updates!

See you at the Fair!

Susan Gearey and Carol Ann Rogers, Heritage Fair Co-Chairs



MONDAY, NOVEMBER 5 & TUESDAY, NOVEMBER 6, 2018



# Elizabeth Pillsbury Society for Planned Giving

*We thank these women for their thoughtful foresight:*

## *Planned Giving Society Members*

## *In Memoriam Contributors*

Mary Louise Anderson  
Drue Ashford  
Judith Branch  
Courtney S. Clarkson  
Chong Cook  
Evelyn R. David  
Christine Dohrmann  
Carol Ede  
Dr. Cecile Julia Eggens  
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Estate of June Arney  
Estate of Alice Ross Carey  
Estate of Mildred Centanni  
Estate of Ilse Gaede  
Estate of Shirley Hucklin  
Estate of Effiellen Jefferies  
Estate of Elizabeth Lippitt  
Estate of Chrissie Martenstein  
Estate of Jo Martinoni  
Estate of Elizabeth  
O'Shaughnessy  
Estate of Mary E. Phillips  
Estate of Emilie Plake  
Estate of Nancy Weston  
Estate of Mary Yetter

*If you would like to receive information about joining the Elizabeth Pillsbury Society, please contact the 640 Heritage Preservation Foundation office at 415.872.7272 or [director@640hpf.org](mailto:director@640hpf.org).*



## Tribute Program: January 2018 to April 2018

**In honor of Marie Berggren**  
Ruthann Conway

**In memory of Ruth Diefenbach**  
Eve Wertsch

**In memory of Dean Johnson**  
Lynn Thompson

**In memory of Patricia Caspersen**  
Eve Wertsch

**In memory of Lee Tyree**  
Lynn Thompson

*Tribute Gifts may be made in any denomination. If you would like to make a tribute gift, you can pick up a Tribute Form in the Foundation Office on the third floor at 640 Sutter, call 415.872.7272 or email the Foundation at [director@640hpf.org](mailto:director@640hpf.org) or visit the website at [www.640hpf.org](http://www.640hpf.org).*

# Welcoming Donna DiGiuseppe Matcovich



The 640 Foundation Board is proud and happy to introduce its newest member Donna DiGiuseppe Matcovich. Donna studied Humanities at the University of California at Berkeley, including a year in Venice at Ca' Foscari, focusing on the Northern Italian Renaissance. After a law degree from the University of San Francisco and many years practicing law, she returned to her passion for the Italian Renaissance. She earned a Master's degree in History at San Francisco State University with a thesis on Renaissance portrait artist Sofonisba Anguissola (c. 1535-1625). Donna lectures frequently on Sofonisba, including at Progetto Sofonisba in Palermo, Sicily, and has traveled the world to view her work.

Donna lives with her husband and sons in San Francisco, California, and Abruzzo, Italy. The family has recently acquired her grandmother's home in the village of Casoli di Atri in Abruzzo and is planning its restoration.

In the fall of 2018, Donna's novel *Lady in Ermine: The Story of a Woman Who Painted the Renaissance* is to be published by Bagwyn Books, an imprint from the University of Arizona. We look forward to learning more about Sofonisba, and to Donna's contributions as a member of our board.

## Bliss & Faville, San Francisco Architects

The Marines' Memorial Club is located at 609 Sutter Street in San Francisco's Union Square neighborhood and was designed by the firm of Bliss & Faville. The 12-story Beaux-Arts-style building was built in 1926 as the Western Women's Club. San Francisco architects Walter Danforth Bliss and William Baker Faville's consistently high quality designs were important contributors to raising the architectural standards of the Bay Area. Both men were schooled in the Beaux Arts tradition and their firm was one of the most important architectural firms in San Francisco due to the consistent quality of their designs and their cumulative contribution of the character of downtown San Francisco. Bliss and Faville also designed the elegant Metropolitan Club at 640 Sutter Street.

In 1947, the U.S. Marines purchased the building from the Western Women's Club and opened it as a private club for veterans of the Marines. Today, membership at the Marines' Memorial Club is open to all US servicemen and servicewomen.

This November the 640 Heritage Preservation Foundation is holding the 2018 Heritage Fair at the Marines' Memorial Club. Join us, shop and check out this Bliss & Faville (and San Francisco) gem!



Marines' Memorial Club. Digital image. Department of Everyday, n.d. Web 10 April 2018  
<https://visualingual.wordpress.com/2015/05/11/marines-memorial-club-by-bliss-faville/>



*Save the Date!*  
MONDAY,  
NOVEMBER 5  
& TUESDAY,  
NOVEMBER 6, 2018



# The Heritage Fair

Similar to the 2014 event, there will be a Preview Party on the evening of November 5<sup>th</sup> and a full day of shopping on November 6<sup>th</sup>. Look for your sponsor invitation in the mail in May!

We are looking for volunteers to assist with everything from vendor hospitality to our preview party preparation to checking in guests. Interested in joining us? Please let us know!



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