

Family and Philanthropy: Planning for the Future

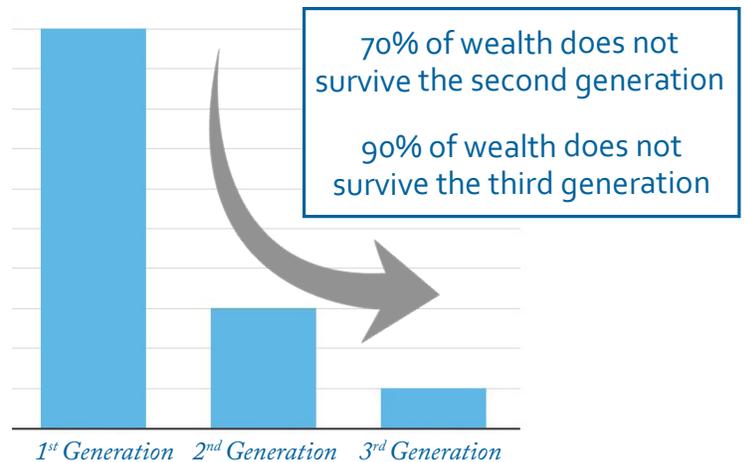
What do you want your legacy to be? You may have made plans with your financial advisor and attorney and completed all the essential forms to pass along your tangible assets, but have you prepared your beneficiaries and the next generation to inherit the wealth, both tangible and intangible, that you have created and stewarded?

As with everything in life, preservation requires thoughtful planning for the future.

Lisa Snyder, a Legacy Strategist with First Republic Bank, presented her perspective on this topic on February 26 at the Wine, Women and Financial Wisdom seminar. As she noted at the outset, the statistics in the box on this page are real and daunting. They definitely caught the attention of her audience! In addition, of primary importance for us all is that 90% of women will be solely responsible for their own finances at some point in their lives. As a result, many women will also be responsible for the transition of wealth to their beneficiaries.

We all have wealth that is more than our money—the values we hold, our reputations in our communities, our knowledge and health. What does a successful transfer of all of our wealth look like? Lisa quoted the Institute for Preparing Heirs ©: “A successful wealth transfer is when the heirs receive and manage assets in a manner to foster their development of lifetime goals, and family unity remains.”

Family unity is the key phrase here. We all know stories of family dissension that erupt after the death of a patriarch or matriarch, leading to further acrimony and legal challenges that rarely, if ever, resolve the underlying family dynamics. Lisa observed that planning for the transition of assets now can bring unresolved matters to the forefront and address them,



as stressful as it may be to initiate these discussions. Meeting as a group can allow you to discuss and explore with your heirs and beneficiaries what you have done with your legal documents and why, what values you and your family hold and how you can foster trust and communications within your immediate and extended family.

For Lisa, this all begins with the family story and shared values. Who are you and how does that guide your future? What is unique about the legacy you are leaving? Where do the family’s assets come from? How can your actions now promote family harmony and preserve family wealth for the future? Can you frame your shared values as a family mission statement? How can you encourage your heirs to lead a value-driven life?

Philanthropy can be an important pathway for these discussions. Lisa noted that giving and volunteering is highly prevalent among women. Dr. Robert Emmons in his book, *Thanks! How the New Science of Gratitude Can Make You Happier*, suggests scientific research also shows that a practice of gratitude increases happiness and well-being.

continued on page 7

A Message from President Barbara Kimport

THANK YOU!!! The 640 Fund finished 2018 with strong support for our research and education program. Donors like you contributed generously and truly make a difference in our ability to celebrate and preserve the history, architecture and heritage of women's athletic clubs in San Francisco. We continue to marvel at the bold steps a small group of women took in 1915 to create the Woman's Athletic Club and look forward to bringing you more inspirational (and fun) insights about their work and the architects they hired to fulfill their vision.

With gratitude, we also recognize our Tribute honorees with their donors who make our work possible. As we go through the year, please do remember the Tribute Program as an opportunity to honor those who enrich your life and community.

Earlier this year, you may have read about *Lady in Ermine: The Story of a Woman Who Painted the Renaissance*, a biographical novel about Sofonisba Anguissola, an historic figure who embodies the struggle of women painters for encouragement, opportunity and recognition. Written by 640 Board member Donna DiGiuseppe, the novel has been described as an "historical feast." We have benefitted from Donna's participation on the Board and congratulate her on the positive reception to this book. She has left the Board at this time and is now traveling extensively on a book tour. We look forward to her rejoining the Board next year.

Please plan to attend two upcoming 640 Heritage Preservation Foundation events:

- Our Shop for a Cause night in San Francisco on July 25, 2019 at St. John Boutique
- The Alice Ross Carey Memorial Lecture—produced in partnership with San Francisco Architectural Heritage, the sixth annual lecture will take place in September of 2019

We are grateful for your interest and support. Please do contact us if you have any comments or questions about our work.

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



Guest Speaker Lisa Snyder & Event Hostesses Helene Ettelson.



640 Foundation Secretary Jo-Ann Rose & Mary Jo Potter.

The 640 Heritage Preservation Foundation was proud to present Wine, Women, & Financial Wisdom, a financial seminar for women by women on February 26, 2019. Lisa Snyder, a Legacy Strategist from First Republic Bank, answered questions about family, finances, and philanthropy following her presentation, "Planning for the Next Generation."



First Republic team members Olivia Humphrey, Jeanmarie LaBonte & Tia Tran.



Event Attendee Deidre Brodeur Coen.



640 Foundation Treasurer Marie Berggren & Anna Ewins.



Event Hostesses Helene Ettelson, 640 Foundation President Barbara Kimport & Carolyn Squeri.

Thank You

to our generous 2018
640 Fund Donors!



The Board of Directors of the 640 Foundation extends a heartfelt thank you to the many generous participants in our 2018 640 Fund campaign. Research and education of the public is our primary focus in 2019, continuing vital activities and programs about the historical legacy of women's athletic clubs and San Francisco, in particular, the architecture of 640 Sutter Street, and financial and medical planning issues of importance to women.



Tribute Program: January 2018 to April 2019

THE FOUNDATION GRATEFULLY ACKNOWLEDGES ALL THE PEOPLE WHO MADE
MEMORIAL OR HONORARY GIFTS OVER THE LAST YEAR.

Memorial Gifts

In memory of Suzanne TeRoller Busch
Virginia Formichi

In memory of Patricia Caspersen
Eve Wertsch

In memory of Ruth Diefenbach
Eve Wertsch

In memory of Dean Johnson
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In honor of Marie Berggren
Ruthann Conway

In honor of Helene Ettelson
Ayn McGee

In honor of Virginia Formichi
Carol Ann Rogers

In honor of Anthea Hartig
Molly Brant

In honor of Janet Higgins
Amy Corbett

In honor of Barbara Kimport
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In honor of Donna G. Krupp
Carol Ann Rogers

In honor of Miss Lucy Li's Birthday
Helene Ettelson

In honor of Gladys K. Mitchell
Carol Ann Rogers

In honor of Gee Gee Platt
Carol Ann Rogers

In honor of Chris Scheerder's Birthday
Helene Ettelson

In honor of Camilla Smith
Carol Ann Rogers

In honor of Misty Tyree
Ayn McGee

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 or visit the website at www.640hpf.org.

“Most importantly we must always remember that each resource’s raison d’être is for the people it serves. A perfect restoration is worthless if the building cannot be used. Our vision is not only to meet, but exceed the expectations of the owner, the users, the viewer of our projects and the building. The compliments from them are a great reward, but the continued life of the architecture is why I am a preservation architect.” - Alice Ross Carey



Alice Ross Carey

In July 2013, the City of San Francisco lost an important historic preservation advocate. The 640 Heritage Preservation Foundation lost one of its three founding members and a past president who played a critical role in the seismic and life-safety renovations at 640 Sutter Street.

The Alice Ross Carey Memorial Lecture is held every fall in recognition of Carey’s work as a highly accomplished and acclaimed preservationist. Anthea Hartig, now Elizabeth MacMillan Director of the Smithsonian’s National Museum of American History, delivered the first lecture about Carey and noted that she taught us about the “complicated web that remains to this day of compliance, restraint, magic, deftness—all that is preservation architectural practice.” Her company, Carey & Co., known for “high-quality design services for the restoration, rehabilitation, and adaptive use of civic and commercial structures. The firm’s integrity, unwavering commitment to quality and leadership in the preservation community, has led to a growing national reputation.” As a founding board member, Carey gave the 640 Foundation countless hours of service and advice about preserving 640 Sutter which continues to benefit our mission and work. The 640 Foundation also benefitted greatly from Hartig’s service from 2009 to 2011 as a Board member.

Gee Gee Platt, 640 Board member and a consummate preservationist in her own right, will chair the sixth annual event.



Gee Gee Platt & Anthea Hartig

*Please join us in
September for
the 6th annual*

**THE ALICE ROSS CAREY
MEMORIAL LECTURE**

Co-Sponsored by: **SF** HERITAGE and



Exploring the “Corners of History”

The Perspective of an Architectural Historian



Michael Corbett discussing his research on San Francisco Architects Walter Bliss & William Faville at the 2016 Alice Ross Carey Memorial Lecture.

In 1973, architectural historian Michael Corbett took on the first paid job of his career. It was also his introduction to the architectural firm that would become a major focus of his research 40+ years later. At the time, he was paid \$100 for a year-long project to research and write a 100-page nomination of the San Francisco Civic Center to the National Register of Historic Places which included the Bliss & Faville designed State Building.

While doing the research on the State Building, Corbett’s interest was particularly piqued by the fact that, although they were prominent architects in the San Francisco Bay Area in the early 20th century, the work of Walter Danforth Bliss and William Baker Faville had not been archived nor had much been written about their personal lives.

For the past three years, Corbett has been dedicated to correcting this deficiency. Funded by a grant from the 640 Heritage Preservation Foundation, he has been researching, analyzing and writing about the extensive body of work produced by Bliss & Faville which includes numerous residences for the upper strata of San Francisco’s elite as well as such landmark buildings as the Bank of California, St. Francis Hotel, ACT Theater, Southern Pacific, the Marine’s Memorial Club and the Woman’s Athletic Club of San Francisco.

While writing the National Register nomination for the Woman’s Athletic Club of San Francisco (WAC) in 2004, Corbett was intrigued by the influence of familial and personal relationships in Bliss & Faville’s client base. For example, the founder of WAC was Elizabeth Taylor Pillsbury whose sister-in-law Edith was married to Walter Bliss, making the choice of Bliss & Faville to design the club’s headquarters at 640 Sutter Street a natural one. In fact, Corbett states, “virtually every client they had was through personal connections.” Those connections often involved women who knew each other through their clubs and their charitable and civic activities.

Besides the absence of an existing archive, another challenge presented to Corbett in his research was the fact that both Walter Bliss and William Faville were pre-deceased by their wives and had no children. As a result, “there was no one around to look after their legacies” notes Corbett. During the course of his research, however, he was able to meet and spend time with Walter’s nephew, the late Bill Bliss, who was then still living in a house at Glenbrook at Lake Tahoe that Walter had built for his wife when she was dying. As Corbett explains, “When you are doing this kind of research and are able to meet someone where there is a personal connection, things become real, and the research becomes fun and exciting.”

Although interested in Bliss & Faville since 1973, Corbett admits that what he could have learned back then is so much less than today because of the extensive digitizing available on the Internet. Applications like ancestry.com and digital newspaper files provide information that “you couldn’t have found in a lifetime of research before,” notes Corbett. “Ten years from now, who knows what more will be accessible?”

Corbett grew up in Texas and says he found his way to history while writing his senior thesis in Anthropology. During his thesis review, it was noted that “we think this is really good, but it’s not really Anthropology, it is History.” He had acquired skills in using primary sources which he continued at the University of California at Berkeley studying the History of Architecture. His

continued on page 7

Family & Philanthropy, cont'd.

continued from page 1

“When planning about your legacy, hope is not a strategy.”

--Lisa Snyder, Legacy Strategist

You can create and build a culture of gratitude through family conversations. In many instances, family members decide on philanthropic priorities together, sharing individual interests and engaging all in charitable giving.

Lisa described her objectives for this presentation as creating awareness, exploring actions to be taken and building a culture of gratitude in your family. She certainly met these objectives! The attendees were inspired by her stories and were grateful for the checklist she provided to assess current financial readiness and steps to take to have those important family conversations.

We were glad to hear from at least one woman that the very next day, she reviewed her financial document and identified a few potential problems. Within two weeks, she amended her trust. Proof of Lisa's advice: potential problems averted!



Exploring the “Corners of History”, cont'd.

continued from page 6

first work in the field was with Charles Hall Page & Associates (later Page Anderson Turnbull and now Page & Turnbull.) In 1979, he wrote *Splendid Survivors: San Francisco's Downtown Architecture* which is credited with helping preserve downtown San Francisco's important architecture. Besides the nomination of the Woman's Athletic Club, Corbett has worked on National Register nominations for the Civic Center Historic District, the Uptown Tenderloin Historic District, Temple Sherith Israel, the Jessie Street Substation (now the Jewish Museum) and the San Francisco Embarcadero Historic District.

Although his research on Bliss & Faville has been a long-term interest, Corbett notes that in his field “one of the interesting things is that you don't have a lot of choice. If the phone rings and there is a project, that's what I do.” This has often brought him into “cor-

ners of the greater history of things, ordinary things that were unknown.”

Asked to comment on how well San Francisco has done in preserving its architectural heritage, Corbett says, “I feel that really great things have been done. Things are so much better now than forty years ago. Now we have a process that recognizes the importance of having a downtown plan and preserving the neighborhoods.” He does worry about the future, however. “There is so much money. I worry that some of these protections may be lost.”

In the course of his current research, Corbett is in the process of researching all of Bliss & Faville's clients, allowing him to answer with confidence the question, “Where did they get their clients?” The answer, “They knew them already.”



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5:30 - 8:30 p.m.

St. John Boutique, 767 Market Street, San Francisco