As the Editor of Group Assets, I have shared with you the many ways that you can contribute to the ongoing work and sustainability of our beloved organization. Your generosity and commitment to AGPA through donations to the Group Foundation has literally changed our culture and ensured our ability to provide the next generation with the rich training and collegial experiences we have enjoyed.

Many of you have made annual contributions through the Leadership Fund and the Education and Scholarship Fund to support our ongoing work. Some of you have made major gifts to support specific educational events at the Annual Meeting, now known as AGPA Connect, or to honor the memory of friends, family, or colleagues. This level of giving was featured in the last issue of Group Assets.

Now I want to talk with you about the ultimate gift of planned giving through bequests in your wills or by investing in a charitable gift annuity. This gift is not about what you are doing now, but what you will leave behind as part of your personal and professional legacy. This is a significant contribution because it’s about the future. It’s about the future of group psychotherapy training programs, the future of group psychotherapists, and your continued voice in advocating for the power of the group in healing and creating healthy communities at many levels. Recognizing the need to sustain our mission over time, the Group Foundation established the Legacy Society, and it has become integral to supporting our long-term goals. It started out as a small group but has grown.

Patricia Barth, PhD, CGP, DFAGPA, a member of the Legacy Society, spoke about this during her tenure as the Chairwoman of the Foundation in a letter to the membership, which was eloquent and is worth citing.

"Each of us has a private wish to see the best of our accomplishments live on long after our own involvement ends. We are determined to make financial and estate decisions that benefit our family, loved ones, and the organizations that have been important in our lives."  

Dr. Barth went on to reference the planned giving materials that the Foundation created as an educational guide to help us understand the options that are available to us. These materials can be accessed at www.agpa.org/Foundation/ways-to-give/become-a-member-of-the-legacy-society.

This letter was written in 2005, and since then, the Legacy Society has grown (you can see the current listing in this and every issue of Group Assets). Bequests are seen as a good alternative for contributions for those who are unable to make a yearly donation, but want to support the Group Foundation. Another alternative type of planned giving is a Charitable Gift Annuity. In the Charitable Gift Annuity, you give a lump sum of money, or appreciated securities, to a financial institution that sets up an account and manages the money. Depending on your age, every year you will get around $5% of the account. Upon your death, the remaining principal is contributed to the Group Foundation. Another benefit, though you wrote to check with your accountant for your specific details, is the IRS considers a portion of the money as a charitable contribution, and it can be deducted.

Ramon and Anne Alonso set up a Charitable Gift Annuity for the Foundation, using our partner Comerica Legacy Federation, and Ramon has been happy with it. Ramon is featured in this issue’s Faces of the Foundation column, where he shares his experience of using this vehicle to contribute to the Foundation. Ramon also wrote an article on this, which you can find in the above referenced Legacy Society section of the Group Foundation website, where he gives more details. I loved the title of his article: Give Away Your Cake (But Eat Some Of It, Too). I think the more people learn about this approach to charitable giving, the clearer the benefits become, most importantly meeting the need of generating an income flow for donors and helping deal with some of the anxiety of making a yearly contribution.

Ramon and Anne Alonso were among the first Founder’s Circle and Legacy Society members by creating a Charitable Gift Annuity and have certainly served as role models in shaping the culture of giving that is so important in our organization. I asked Ramon if he would be willing to share some of his thoughts and experiences about establishing the Annuity. In his wonderfully generous spirit, he responded with an immediate “yes” and sent me the following:

“About 14 or so years ago, Anne and I decided to make a major gift to AGPA. Over the years, we had been giving money as a thank you gift; no other amount we were comfortable with, but we learned about Charitable Remainder Trusts (CRT), which let you give away the cake while preserving the tart. A CRT would give a steady percentage (based on our age), something like 5+, yearly, with the bulk of the gift (growing, depending on the securities he has invested in) going to the Foundation upon our death. Anne, alas, died shortly thereafter. Apparently your brother was both happy with the arrangement, and I have been happy to leave something concrete for AGPA to build on. AGPA was most important for Anne, and for me now, keeping her memory alive. For us, this was an easy as we could get to taking it with us.”

I found Ramon’s comment on how their donation was “keeping her memory alive” very moving. This is the heart of a legacy gift. Beyond the generosity of the gift, it was clear that Ramon gave Anne support for her enormous commitment to AGPA. Ramon is a great example of the many husbands, wives, and partners who have supported the interests of their significant other.

On the practical side, Ramon also commented, that he didn’t know why more people didn’t use this alternative to making charitable contributions because it made so much financial sense. I take this comment very seriously because Ramon is one really smart smart guy.

As an organization we are very lucky to have Ramon Alonso as a part of our AGPA community. He brings his strong intellect, his big heart; his generous spirit, and his unbridled sense of humor with him. Thank you for all that you have given us Ramon in so many ways.

LEGACY SOCIETY

We appreciate the provisions these planned gift donors have made for the Group Foundation.

Ramon Alonso
Shari & Allan Baron
Connie Concannon
Patricia & Merle Barth
Richard Beck
Martha Block & Leonard Walter
Trish Cleary & Diana Kunkel
Eleanor Counihan
Jerry & Nancy Gans
Kate Griffin
David Hawkins
Sally Henry
Jeffrey Hudson & Robert Blodgett
Susanne Jensen
Celine Keeper
Lisa Mahon & Phil Flores
Jan Morris
Keith Rand & John D’Amico
Joseph Shay & Laura Zimmerman
Lorraine Wodiska
Elliot Zeisel & Mary Sussillo

Creating Your Legacy…The Ultimate Gift
Connie Concannon, LCSW, CGP, DFAGPA, Editor, Group Assets

Scholarships
The Group Foundation recognizes excellence, promise and vision through scholarships to attend the AGPA Annual Meeting, now known as AGPA Connect. Applications are now being accepted for scholarships to AGPA Connect 2018, to be held in Houston, Texas, February 26-March 3. Details on the application process along with the new online application can be found on the website at www.agpa.org/foundation/scholarships.

The early decision deadline for applications is November 1, 2017. Applications will be accepted after this date for review on a funds-available basis. Please consider a donation to the Foundation’s Education and Scholarship Fund to help support the training of these new professionals and students.

Research Grants
The Group Foundation provides grants to support research that advances group psychotherapy. Grants are typically awarded at $2,500-$15,000, depending on the importance of the research to the field and the number of research applications received. The application and other relevant information may be found on the AGPA website at www.agpa.org/foundation/research-grants.

The deadline for receipt of research grant application materials is November 1. Email submission is required; applications and inquiries should be sent to the Foundation at mail@agpa.org.

Contributions to the Foundation can be made online at https://member.agpa.org/ima/agpa/GiveNow.

REMINDER:

Group Foundation Scholarships and Grants Application Deadlines Are Approaching!

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Do not hallucinate.

The Faces of the Foundation
Ramon Alonso, PhD

In this issue of Faces of the Foundation, it is my pleasure to feature Ramon Alonso, PhD, who serves on the Group Foundation Board. Ramon was married to Anne Alonso, PhD, CGP, DFAGPA, our beloved and our Chairwoman of the Group Foundation. Though Ramon isn’t a group therapist, he has a PhD in applied mathematics (he is now retired).

Through Anne, we began to know and love Ramon. He was there to support Anne in all the work and time that she devoted to AGPA and the Group Foundation, and along the way, he developed some wonderful friendships. After Anne’s passing, Ramon served on the Group Foundation Board and remained connected to the organization. We were pleased to keep his friendship.

Anne and Ramon were among the first Founder’s Circle and Legacy Society members by creating a Charitable Gift Annuity and have certainly served as role models in shaping the culture of giving that is so important in our organization. I asked Ramon if he would be willing to share some of his thoughts and experiences about establishing the Annuity. In his wonderfully generous spirit, he responded with an immediate “yes” and sent me the following:

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Creating your legacy

If this alternative appeals to you, the Foundation will help you explore it, set it up, and make specific recommendations for the appropriate custodians on whom you put all the pros and cons of this decision. The Foundation website provides information that you need in setting up a bequest or a charitable remainder trust. The Foundation website provides information that you need in setting up a bequest or a charitable remainder trust.

Contributors

(To whom we are grateful for their gifts to the Foundation)


Dedicated to perpetuating the legacy of...