



# Foundation FOCUS

Spring 2009

INVERNESS VILLAGE ... supported by Asbury Foundation

## A Great Team



**Residents Sid and Bev Patterson chair the Inverness Village Lifestyle and Services Enhancement Project campaign.**

When Sid Patterson, as a Tulsa city commissioner in the 1970s, created an urban tree-planting program, people said, “You can’t plant huge numbers of trees and keep them alive in Oklahoma’s hot, dry summers!”

And when Sid and his wife, Bev, agreed to chair a new capital campaign at Inverness Village last fall, they knew climate was once again an issue—this time, the economic climate.

But naysayers have never stopped the Pattersons.

Thus, more than 18,000 trees later, Sid’s program success was recognized last November at the unveiling of a bronze statue in his honor in River Parks. “It’s beautiful!” says Bev proudly.

“A whole busload of our friends from Inverness Village came to the unveiling.”

The Inverness Village Lifestyle and Services Enhancement Project campaign reached almost two-thirds of its goal in cash

and pledges by mid-February. “And it wasn’t even really until December that one family contributed a wonderful anonymous grant that gave the campaign real momentum,” explains Sid.

He and Bev attribute the campaign’s success to the quality of the enhancement plans and the benefits they’ll bring to the entire Inverness community. “Plans really evolved as a joint effort between staff and residents,” Sid notes.

The story? With 85 percent of residents using the Wellness Center, Wellness Director Jana Headrick wanted to have more room for exercise equipment and classes, plus improved and expanded locker rooms. Residents suggested an interior redesign that would produce a larger lounge, deli and new grill, creating new opportunities to gather. This would enable Inverness to serve breakfast and lunch. Final plans also include a new spa that will expand the services of the current salon.

Sid says, “Bev and I have noticed that once newcomers to Inverness get active at the Wellness Center and start eating regular meals, they’re in better health.”

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PHOTO BY SHERRY BROWN FOR TULSA WORLD

**Tulsa Mayor Kathy Taylor (left), Bev Patterson (center) and others applaud Up With Trees founder Sid Patterson (right) after unveiling a statue of him in River Parks on Nov. 6.**

# Golfing Tradition Returns in June

Asbury Foundation is delighted to announce the return of the 2009 Caring Classic Golf Tournament. It will be held at the championship course at the Members Club at Four Streams in Beallsville, Md., on Tuesday, June 9.

More than \$50,000 was raised for Benevolent Care and Care Assurance funds at last year's event. Confidential assistance from these funds enables residents in need to remain in their home at one of six Asbury communities, where they may live out their years with dignity, knowing their housing and medical expenses will be provided for. Our goal is to surpass last year by 20% so the increased gifts can meet increased

needs on our campuses.

Willis HRH Insurance and The Hartford are generously sponsoring this year's tournament. Two of our Leadership Sponsors are Sodexo and Flagship Rehabilitation Services. We are grateful to them and to all of our sponsors and volunteers for making the Caring Classic possible and for supporting Asbury's benevolent care mission.

A full day of golf is planned on Four Streams' course, ending with a reception, awards ceremony, and elegant dinner. A special silent auction will also support the Benevolent Care and Care Assurance funds.

To learn more, please contact Cece Bailey at Asbury Foundation, 301-216-4052. Brochures and registration are available at [www.TheAsburyFoundation.org](http://www.TheAsburyFoundation.org).

Join us on the greens as we celebrate a successful year for this very worthy cause.

## Your Gifts Make a Difference!

During 2008, your gifts helped enrich the lives of residents through:

- Landscaping/creek projects
- Bus operating expenses

## Continued from Our Cover

Adds Bev, "Residents see the need for the Lifestyle and Services Enhancement Project and are eager to see it accomplished."

"The optimism and enthusiasm of Board member Dr. Mike Mitchell and Executive Director Scott Bushong are very contagious," notes Sid. "Residents understand that because of the fundraising effort, their fees won't go up to support this important project."

Energetic and optimistic themselves, the Pattersons continue to make campaign communication a priority in their busy lives. Sid fits it in

among his work on the board of Up with Trees! as well as projects of the Tulsa Rotary Club. He is also active with Inverness Village's men's chorus and Don't Tell Luncheon Series. Bev enjoys playing bridge and belongs to a group that has been meeting for more than 60 years. She is on the Inverness Dining Committee and is a volunteer at her church, John Knox Presbyterian, where both she and Sid have served as Elders.

The couple are native Tulsans who knew the Inverness founders and joined the community in 2003. They make a great team—not surprising, after 62 years of marriage.

"We're well on our way with the campaign, but this is the hardest part!" says Sid. "We are seeking a high percentage of participation from residents." The challenge motivates them, however. The Pattersons note that the project is going out for bids and they are looking forward to the start of construction.

Sid adds, "Residents here are supportive and the administration is responsive. I think everyone will be really proud when this project is completed!"

## Use The Same Dollar Twice!

Couple gives their **beach home** worth **\$250,000** to fund a Charitable Gift Annuity to **benefit Inverness Village**

Gift to Kids

\*Couple receives guaranteed income of **\$1,104.16/month** for life

Gift to Inverness Village

+Couple chooses to **use income to fund a \$662,400 life insurance policy** to leave their heirs as a tax-free gift

At death of couple, **Inverness Village** receives the **\$250,000** gift

\*This example is based on a 2-life gift annuity for a male 75 years of age and a female 70 years of age as of March 2009.  
+This example is using standard and second death life insurance rates.

**A Charitable Gift Annuity can be funded using:**  
**Real Estate • Stock • CDs**  
**Bonds • Cash**

*For more information, please contact:*

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**Inverness Village Foundation and Campaign Committee members:**

Sid and Beverly Patterson,  
*Campaign Co-Chairs*  
Dr. Michael Mitchell,  
*Committee Chairman*

Le Akers  
Lloyd Alexander  
Scott Bushong  
Bebe Campbell  
Robert Degen  
Kathy Gorrell  
Robert Lengacher  
Karen McCay  
Robert Rorschach

## What Legacy Will You Leave?

**W**e all desire significance to lead happy and fulfilled lives surrounded by family and friends. And for many of us, there is a compelling need to make a difference, to leave a lasting impact on the people dearest to us and the world in which we live.

The search for significance and the desire to plan for the future lead many to ponder their legacy. What kind of legacy will you leave? A bequest is perhaps the easiest and most tangible way to have a lasting impact on the people and

organizations that mean the most to you. And a bequest may be an effective way to make a gift and lessen the burden of taxes on your family and on your estate.

### **The Benefits of a Charitable Bequest**

A charitable bequest is a bequest written in a will or trust that directs a gift to be made to a qualified exempt charity when you pass away. Such a bequest enables you to further the good work of an organization you volunteer with or support long after you are gone.

It can help you save estate taxes by providing your estate with a charitable deduction for the value of the gift. With careful planning, your family can also avoid paying income taxes on the assets they receive from your estate.

### **An Easy Gift to Make**

A bequest is one of the easiest gifts to make. With the help of an advisor, you can include language in your will or trust specifying a gift to be made to family, friends or charity as part of your estate plan.



## Inverness Village

3800 West 71st Street

Tulsa, OK 74132

[www.InvernessVillage.com](http://www.InvernessVillage.com)

*Discover how two residents are leading  
the charge to enhance life at Inverness*

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## Mark Your Calendars!

**May 15**  
Wine Tasting and  
Blues Festival

**June 9**  
2009 Caring Classic  
The Members Club  
at Four Streams

