

William Sherman Winseman Foundation, Non-Profit 501(c)(3), EIN 95-3202989

905 Calle Negocio, RT#74146

626-310-3131 wswfoundation@gmail.com

WSW-FOUNDATION.COM

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Age(s): _____

Children Yes No. (If Yes,) Ages: _____

Professional Background: _____

Spouse _____ Professional Background: _____

Numbers _____ of _____ Years _____ in _____ Profession: _____

How Did You Hear About Us? _____

Please List Volunteer Experience: _____

Do You Currently Have a Charity(s) That You Fund on a Regular Basis?(Yes/No): _____

If Yes, List All:

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Areas of Interest (Check All That Apply):

- Autism
- Pediatric Cancer
- Cerebral Palsy
- Pancreatic Cancer
- Homelessness
- Therapy Dogs
- Veterans
- Homeless Veterans .
- Disabled Veterans
- Disabled Children-(Physical, Mental, Social)
- Seniors

Check All That You Would Like More Information Regarding:

- Monetary Donations:
 - Monthly
 - Quarterly
 - Annually
- o Sponsorship
 - Grants
 - Honorariums
 - Scholarships
 - Tuition
 - Therapy Dogs (AKC)
 - Cancer Research
- Remainder Trusts
- Volunteerism (I Have Enclosed a PDF Copy of my Resume. Yes____No)
- Employment (I Have Enclosed a PDF Copy of my Resume. Yes____No)

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I Need Help and Would Like More Information Regarding (Check All That Apply):

- o Establishing for Myself:
 - Creating a Trust
 - Creating a Family Trust
 - A Medical Directive
 - Power of Attorney (POA)
 - Probate Issues
 - Durable Power of Attorney (DPOA)

- o Caring for a Loved One:
 - Fiduciary
 - Executor
 - Trustee
 - Conservatorships/Guardianships
 - Special Needs Trusts (SNT)

- o Trust, Investments, & Accounting:
 - Creating a Charitable Remainder Trust (CRT)
 - Creating a Charitable Gift Annuity (CGA)
 - Creating a Charitable Reverse Mortgage (CRM)
 - Managing my investments — (Chartered Financial Analyst, Certified Financial Planner)
 - Taxes & Accounting
 - Trust Taxes & Accounting — (Certified Tax Specialist)
 - Estates & Non-Profits (Specialist)

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Who we are:

We are a Non-Profit 501(c)(3) charitable Foundation. William Sherman Winseman Foundation , (WSW) Foundation 501(c)(3) 1960-2020, (61st Anniversary) a Non-Profit by which Contributions are deductible to the fullest extent allowed by law. EIN 95-3202989

The expenses and staff salaries of the WSW Foundation are completely paid for by internal funds, NOT by public donations.

The Foundation is dedicated to assist children, the elderly, and the disabled for purposes of awareness, needs and educational opportunities. The Founding Family has provided funding for educational scholarships, (UCLA, Los Angeles City College, USC, and West Coast University), and raise Service Dogs for the Disabled and Therapy Dogs for Autistic Children for 20+ years. In recent years we have also provided educational funds for Nursing Students and Home Care Students who have nursing career goals to help special needs individuals and elderly patients.

Many of our projects are supported by corporate donations that don't involve money but rather involve goods, products, redeemable certificates, and manufactured items. The public/community participates with donations of products too

Our Charitable Projects:

"Animals For Autism"

Throughout the month of April, (April is Autism Month) we collect new (unused with manufacturer tags) stuffed animals as a part of our "Animals for Autism" — Fundraiser. The slightly loved stuffed animals are cleaned, sorted, prepared, and readied for our yearly Autism drive which provides a kid with a new friend.

"Simple Act of Kindness"

This project focuses on helping the less fortunate with personal hygiene kits. Once a month we organize events in which the public makes donations of new unopened products which are distributed to Homeless and Veterans. We are aiming to make a difference in and around our community and neighborhoods. Some of the items the hygiene kits include: Toothbrushes, toothpaste, mouthwash, dental floss, soap, deodorant, shampoo, conditioner, hairbrushes, sunscreen, sanitizer, hygiene wipes, shaving cream, razors, chap stick, sanitary pads...

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"I Love My Dog"

A Clinic for Dogs to provide food, treats, toys, and beds for homeless as well as low-income families.

Each homeless person has a unique story. They are people who may: have lost their home, job, or family. They also may: be disabled, elderly, abused spouses, teens, addicts, or be U.S. Veterans.

- The 2019 annual estimated number of homeless people in Orange County was 6,860 persons. (2019 Orange County P.I.T.)
- As much as 24% of the homeless population has an animal companion. (National Coalition for the Homeless)
- Family homelessness is the fastest segment of the homeless population nationwide. In Orange County, 32% of homeless adults reported having children under the age of 18. (2019 Orange County P.I.T.)
- One in five Orange County households makes less than \$25,000 annually. (US Census)

Dogs provide a deep comfort, are non-judgmental, and loyal. They provide warmth and security. The homeless get a type of normalcy by providing food and water for their Dogs. A number of homeless individuals sacrifice their own food for their Dogs. "Dogs are not our whole life, but they make our lives whole" -RC. They provide comfort, unconditional love and dignity. There is also the protection factor: living on the streets is dangerous especially for women and the disabled. For many on the streets Dogs provide them security from those which discriminate against the homeless with beatings or from others who may steal their possessions.

Sadly in many communities, police and animal right activists have seized pets from Homeless simply because of a lack of a License and/or Vaccinations. Medically, the chronically homeless are not able to provide vaccinations, spay or neutering because of cost and separation.

Determined to help, W.S.W. Foundation 501 (c)(3) has launched the development of "**I Love My Dog**" **A Health Clinic for Dogs**, which utilizes mobile clinics set up at designated centers. The Foundation is partnering with volunteer Veterinarian (Dr. Matthew Brady — Veterinary Housecalls) within the community to assist in the operation. Additional products distributed are: collars, leashes, harnesses, ID Tags, food bowls, and medicines (This project aims to aid in preventing canine diseases and protect the community.) We are currently raising the funds for the Vaccination Clinics to serve low income and homeless pets.

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"Veterans — Faith, Hope & Support"

"Homeless and at - risk Veterans need more than just shelter. We must give them the tools to empower themselves and reclaim the self-worth and dignity which comes from occupying a place in the American Dream. It is a dream they fought so hard to defend for the rest of us." -MC

The WSW Foundation provides clothing, socks, and hygiene kits to: (Wounded Warriors, Mental Health Association OC, New Directions for Veterans Housing Projects) as well as homeless Veterans by making monetary donations, linens, towels, bedding, clothing, blankets, pillows, and hygiene kits.

The living facilities allow Veterans to obtain a job, learn necessary skills needed to maintain bank accounts, and develop a discipline for hygiene responsibility as well as maintaining a residence.

- It is estimated that about 30 out of every 100 (or 30%) of Vietnam Veterans have had PTSD in their lifetime. (National Center for PTSD)
- Operations Iraqi Freedom (OIF) and Enduring Freedom (OEF): About 11-20 out of every 100 Veterans (or between 11-20%) who served in OIF or OEF have PTSD in a given year. (National Center for PTSD)
- Among the 284,000 unemployed veterans in 2019, 56 percent were ages 25 to 54, 39 percent were age 55 and over, and 5 percent were ages 18 to 24. (US Bureau of Labor)
- In January 2019, communities across America identified 37,085 homeless veterans during point in-time counts. 51% of which have a disability (National Alliance to end homelessness)

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I would like to participate in the WSW Foundation programs (Check all that apply):

- I Love My Dog (Monetary)
- I Love My Dog (Food, Treats, Toys, Accessories)
- A Simple Act of Kindness (Monetary)
- A Simple Act of Kindness (Hygiene Kit Items)
- Animals for Autism (Monetary)
- Animals for Autism (New Stuffed Animals)
- Veterans — Faith, Hope & Support (Monetary)
- Veterans — Faith, Hope & Support (Products)

Charities we support:

- Talk About Curing Autism (TACA)
- Mission San Juan Capistrano
- Union Rescue Mission
- San Clemente Animal Rescue (No Kill)
- Save a Rescue (No Kill)
- Guiding Dogs of America
- Pediatric Cancer Research Foundation (PCRF)
- March of Dimes
- Make a Wish Foundation
- New Directions for Veterans
- United Cerebral Palsy of Orange County (Chapter)
- Pancreatic Cancer Action Network
- Colette's Children Home - OC
- Laura's House - OC
- The Mission of Kern County
- Wounded Warriors
- Mental Health Association - OC
- UCLA (Scholarships) - Music
- USC (Scholarships)
- LA City College (Scholarships)
- West Coast University (Scholarships) - Nursing
- Saddleback College (Scholarships) – Nursing
- Preferred College of Nursing
- Southwest Museum of the American Indian
- George Westmore Research Library & Museum

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Board of Directors (Unpaid Positions):

Dana D. Winseman — President

David E. Winseman — Vice President

Marvin G. Westmore — Board Member

James G. Jones — Board Member

Tricia M. Dambowy — Secretary/Board Member

Employees (Salaries Paid with only Internal Funds):

Jerome S. Abbott Jr. — Senior Project Manager

Sonia G. Moreno — Corporate Communications Manager

Victoria Smith — Charitable Administrator

Sheldon Hassel — Charitable Administrator

Foundation Advisors / Associates (Fee based with Internal Funds):

Patrick L. Barnes — Attorney

Ernest A. Vargas — Attorney

Chief David (Dave) Snowden — Advisor. (Ret.) Costa Mesa, Beverly Hills, & Baldwin Park Dr. Matthew Brady — Veterinarian / Associate

Mark A. Lester — Attorney

J. Dan Olincy - Attorney

The expenses and staff salaries of the W.S.W. Foundation are completely paid for by internal funds, **NOT** by public donations.

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HOW YOU CAN HELP!

TaxWise Giving - with W.S.W. Foundation

"There are a lot of new data that show if you're generous, charitable, and altruistic, you'll live longer; you'll feel more fulfilled; you'll feel more expressive of who you are as a person; you probably will feel more control and freedom in your life."

The US Tax rules allow individuals not to pay or significantly reduce their income taxes by giving to a recognized 501(c)(3) charitable organization during life or upon death. Many times the dollar amount given is not the same as your out of pocket cost because of our tax laws. In addition, there are special tools such as **Charitable Gift Annuities (CGA) and Charitable Remainder Trusts (CRT)** and others that provide income, income tax deduction, or deferral of capital gains tax. Tax-wise giving is a very important, but often overlooked, part of financial and estate planning. **We can provide you professional guidance.** Please answer the simple questions we have provided you in this document.

Charitable Remainder Trusts (CRT) can be a great tool used for donating to a charitable Foundation because they can create a win-win for both the Foundation and the potential donor. A CRT allows the donor to dedicate property to a qualified charity in the future, but still receive an income stream during the donor's life or for a specified term of years. At the end of the term the property is distributed to the qualified charity, (or charities) of the donor's choice. However, you do not have to wait to take the charitable deduction since the donor will receive the deduction which is calculated using the present value of the property for the year in which he or she forms the CRT, (even if that amount does not actually end up going to charity). CRTs can be especially attractive to a donor who has highly appreciated property with substantial built in capital gains, (stock, real property, etc.) and will be subject to a large capital gains tax hit since a CRT is not subject to this tax.

For example, if a donor owns shares of stock that were purchased for \$10,000 and those shares are now worth \$100,000 then if a donor were to sell them he or she must pay capital gains tax on the \$90,000 gain. However, if a donor instead transfers those same shares into a CRT and the CRT sells them, the CRT will not be subject to this tax. Therefore, the donor gets the benefit of the full \$100,000 in funding the CRT. The donor then will receive annual, quarterly, monthly, etc distributions from the CRT, (based on a percentage of the full \$100,000) throughout the term of the CRT. At the end of the term, the "remainder" is then donated to the charity, (or charities) of the donor's choice. There are many different types of CRTs to fit the specific needs of donors, **so feel free to ask us and find out if one works for you.**

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Charitable Gift Annuities (CGA) are important too. These types of gifts require the assistance of a knowledgeable professional and may serve your other objectives. For example, you wish to honor a friend who has helped you during your life — you can give your friend a CGA (income for the rest of your friend's life) and when the friend is deceased whatever is left goes to charity. It is the two gifts in one approach —to the friend and the mission of W.S.W. Foundation (charity).

If you are inclined to give to charities but are property rich and cash poor, you may want to consider a Charitable Reverse Mortgage (CRM). The W.S.W. Foundation charity will give you a CGA in return for receiving your property at death. Or you need to provide for an heir who does not know how to handle money, a CRT allows for income to the heir and they do not have the ability to spend the principal. **W.S.W. Foundation's Financial Advisors, Attorneys and Certified Public Accountants (CPAs) are familiar with these tools.**

It is important to explain your goal and objectives to a knowledgeable professional. Many professionals do not have sufficient knowledge in the charitable area and advise their clients not to do it. Saying no is the safe and easy route to go, this is sometimes a fear of cost. Let us make this worry burden free. The best scenario from a tax perspective is to have a low cost basis and a high market value asset.

The W.S.W. Foundation, 501(c)(3), (has been a charitable organization for over sixty years) has individuals on staff who can give you at no charge or obligation a computer-generated educational illustration showing your likely income, tax deduction and explanation.

"We are here to make donating easy and hassle free!"

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Please answer the following questions.

ESTATE

- When was the last time you updated your estate plan?
- Do you have all pieces of your estate in order?
 - Trust
 - Living Will/Pour-Over Will
 - Powers of Attorney
 - Medical Directives
- Did you know there are simple estate planning tools for those without large or complicated estates?
- Is your estate exposed to potential estate tax? Could it be in the future?
 - Did you know there are strategies you can put in place today to lower your liability in the future?
- Do your kids know what to do if something happened to you?

RETIREMENT

- Are positioned properly to meet your financial goals?
- Have you thought about when to retire, or are you confident your funds will last through retirement?
- Are you positioned properly:
 - Are you overexposed and taking too much risk?
 - Are you not taking enough risk?
 - How will inflation affect my future?
 - Did you know rising interest rates have the potential to damage even “safe” portfolios?

INVESTING

- When was the last time you reassessed your investments?
- Is your advisor held to a Fiduciary standard?
- Do you know what fees you are paying?
 - There are ways to lower investment costs in your portfolio using proper strategies and modern technologies?
- How can your portfolio be positioned to take advantage of economic gains while protecting against excessive volatility?

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W. Sherman Winseman Foundation 501(c)(3) – “A Dream is the seed of Success” tm

Our Specialist Advisors:

Wade W. Slome, CFA & CFP - Chartered Financial Analyst & Certified Financial Planner, Master of Business Administration Cornell University, Author, Founder & President Sidoxia Capital Management, LLC.

Christopher "Chris" K. Poling, JD - Attorney at Law, Specialization Tax Law, Probate, Trusts, Estates & Nonprofits (as an area); Law School: Pepperdine Univ SOL, Malibu CA; LL.M. in Taxation from Loyola Law School; California State Bar Certified Tax Specialist; Olincy & Karpel.

Jerome S. Abbott Jr. - (Former) Vice President & Financial License Manager - Bank of the West, Union Bank, and Chase Bank, (Current) Project Manager W.S.W. Foundation.

Kevin D. Weaver, CFP - Certified Financial Planner, Vice President, Research and Operations - Sidoxia Capital Management, LLC. .