

William Sherman Winseman (W.S.W.) Foundation
Non-Profit 501(c)(3), EIN 95-3202989
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626-310-3131 wswfoundation@gmail.com
WSW-FOUNDATION.COM

Name(s): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Email: _____

Age(s): _____

Children: ___ Yes ___ No (If yes): Ages: _____

Marital status: _____

Professional background: _____

Years in profession: _____

How did you hear about us?: _____

Previous volunteer experience: _____

Is there a charity(s) that you fund on a regular basis? ___ Yes ___ No

If yes, please list all: _____

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Areas of interest: (circle all that apply)

- Autism
- Cerebral Palsy
- Disabled children (physical, mental, & social)
- Disabled Veterans
- Homeless Veterans
- Homelessness
- Pediatric Cancer
- Pancreatic Cancer
- Senior citizens
- Veterans

You would like more information regarding: (circle all that apply)

- Monetary Donations
 - Monthly
 - Quarterly
 - Annually
- Sponsorship
 - Cancer Research
 - Grants
 - Honorariums
 - Scholarships
 - Therapy Dogs (AKC)
 - Tuition
- Remainder Trusts
- Volunteerism (I have enclosed a PDF copy of my resume ___ Y ___ N)
- Employment (I have enclosed a PDF copy of my resume ___ Y ___ N)

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I need help and would like more information regarding: (circle all that apply)

- Establishing for myself:
 - Creating a Trust
 - Creating a Family Trust
 - A medical directive
 - Power of Attorney (POA)
 - Probate issues
 - Durable Power of Attorney (DPOA)

- Caring for a loved one:
 - Conservatorships/Guardianships
 - Executor
 - Fiduciary
 - Special Needs Trusts (SNT)
 - Trustee

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

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Who we are:

We are a Non-Profit 501(c)(3) charitable organization. **William Sherman Winseman (W.S.W.) Foundation 501(c)(3)** 1960-2024 (64th 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 W.S.W. Foundation are completely paid for by internal funds – **NOT** by public donations. ALL donations go directly to those in need.

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 have raised service dogs for the disabled, along with therapy dogs for autistic children – for 20+ years. More recently, we have also provided educational funds for nursing and home care students who have goals to help special needs individuals and elderly patients.

Many of our projects are supported by corporate donations that do not involve money, but rather products, redeemable certificates, and manufactured items. The public/community participates with donations as well.

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Our Charitable Projects:

“Animals for Autism”

Throughout the month of April (Autism Awareness month) we collect new (unused with manufacturer tags) stuffed animals as a part of our “Animals for Autism” fundraiser. Any slightly loved stuffed animals are professionally cleaned, sorted, prepared and readied for our yearly autism drive, which provides a child with a new friend.

I would like to donate to this project: ___Y___ N

“A 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 Veterans and homeless individuals. We are aiming to make a difference in and around our community/neighborhoods. Some of the items that are included in the hygiene kits are: toothbrushes, toothpaste, mouthwash, dental floss, soap, deodorant, shampoo, conditioner, hairbrush, sunscreen, sanitizer, hygiene wipes, shaving cream, razors, lip balm, and feminine hygiene products.

I would like to donate to this project: ___Y___ N

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“Literacy & Crafts”

This Project focuses on building an interest and awareness for literacy and the arts. The goal of helping kids to think out of the box, expanding one’s knowledge, as well as developing an appreciation for one’s creative talents.

I would like to donate to this project: ___Y ___ N

“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 W.S.W. Foundation provides monetary donations, clothing, socks, undergarments, towels, bedding, pillows, and hygiene kits to Wounded Warriors, Mental Health Association OC, New Directions for Veterans Housing Project, as well as individual homeless Veterans.

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

- It is estimated that about 30 out of every 100 (30%) of Vietnam Veterans have had PTSD in their lifetime. *(National Center for PTSD)*
- Among the 284,000 unemployed veterans in 2019, 56% are 25 to 54 years old, 39% are 55+, and 5% are 18 to 24 years old. *(US Bureau of Labor)*
- In January 2019, communities across America identified 37,085 homeless veterans, 51% of which have a disability. *(National Alliance to End Homelessness)*

I would like to donate to this project: ___Y ___ N

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“I Love My Dog”

A clinic for dogs to provide food, treats, toys, and beds for the pets of low-income families and homeless individuals.

Each homeless individual has a unique story. They are people who may have lost their home, job, or family. This includes the disabled, elderly, teens, U.S. Veterans, victims of domestic abuse, or addicts.

- The 2019 annual estimated number of homeless people in Orange County was 6,860 people. *(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 growing 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 make less than \$25,000 annually. *(US Census)*

Dogs are non-judgmental, they provide deep comfort and loyalty to their people, along with warmth and security. The homeless get a feeling of normalcy by providing food and water for their dogs. Several 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. They are also able to offer their protection – living on the streets is extremely dangerous, especially for women and the disabled. For many on the streets, dogs provide them with security from those who discriminate against the homeless (physical violence or those who may steal their possessions.)

Sadly, in many communities, police and animal rights activists have seized pets from the homeless simply due to lack of a license and/or vaccinations. The chronically homeless are not able to provide vaccinations, spay, or neutering, because of financial cost and physical 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 veterinarians within the community to assist with the operation. Additional products distributed are collars, leashes, harnesses, ID tags, food bowls, food, and medication. This project aims to aid in preventing canine diseases and to protect the community. We are currently raising the funds for the vaccination clinics to serve low income and homeless pets.

I would like to donate to this project: ___Y___ N

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I would like to participate in the W.S.W. Foundation program(s): (circle all that apply)

- A Simple Act of Kindness (donate hygiene kit items)
- A Simple Act of Kindness (monetary)
- Animals for Autism (donate new stuffed animals)
- Animals for Autism (monetary)
- I Love my Dog (donate food, treats, toys, accessories)
- I Love My Dog (monetary)
- Literacy & Crafts (donate art supplies, books, learning materials)
- Literacy & Crafts (monetary)
- Veterans – Faith, Hope & Support (donate products)
- Veterans – Faith, Hope & Support (monetary)

W.S.W. Foundation is a member of the following Chambers of Commerce:

- Cerritos
- Dana Point
- Laguna Hills
- Laguna Niguel
- Murrieta/Wildomar
- North Orange County
- Oceanside
- San Clemente
- San Juan Capistrano
- Temecula Valley
- Vista

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Charities that W.S.W. Foundation supports:

- Autry Museum of the American West
- Burrito Project
- Children First
- City of Hope
- Engine Company 51
- Guide Dogs of America
- Haven House
- Hear Center
- LA City College (Scholarships)
- Make A Wish
- March of Dimes
- Marine Toys for Tots Foundation
- Mental Health Association of Orange County
- New Directions for Veterans
- Ocean Institute
- Operation Homefront
- Orange County Rescue Mission
- Pancreatic Cancer Action Network
- PCRF – Pediatric Cancer Research Foundation
- Pet Project Foundation
- Ronald McDonald House Charities
- Saddleback College (Scholarships)
- Save a Rescue
- Spark of Love
- St. Jude Children Research Hospital
- Talk About Curing Autism (TACA)
- The Salvation Army
- UCLA (Scholarships)
- Unlimited Possibilities (previously United Cerebral Palsy of OC)
- USC (Scholarships)
- Valley Achievement Center
- Vietnam Veterans of America
- West Coast University (Scholarships)
- Wounded Warrior Project

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Board of Directors (unpaid positions)

Dana D. Winseman – President
David E. Winseman – Vice President
James E. Jones - Board Member
Michael Ullo - Board Member/Secretary

Employees (salaries paid with ONLY internal funds)

Jerome S. Abbott Jr. – Senior Project Manager
Sonia G. Moreno – Corporate Communications Manager
Alma Diaz – Operations Administrator
Jose Laguna – Charitable Administrator
Tara Abbott – Charitable Administrator

Foundation Advisors / Associates (fee based with internal funds)

Patrick L. Barnes – Attorney
Ernest A. Vargas – Attorney
Robert A. Vargas - Attorney
Chief David (Dave) Snowden – Advisor (Ret.) Costa Mesa, Beverly Hills & Baldwin Park
Mark A. Lester – Attorney/Foundation’s Registered Agent
J. Dan Olincy – Attorney

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TaxWise Giving with W.S.W. Foundation

“There is a lot of new data that show if you are 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 in 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 they form 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 – if a donor were to sell them, they 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 will then 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, if 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 the 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. If 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, with individuals on staff who can give you a computer-generated educational illustration showing your likely income, tax deduction, and explanation – at no charge or obligation!

“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 the pieces of your estate in order?
 - Trust – Simple or Complex
 - 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 were to happen to you? If not, who does?

RETIREMENT

- Are you 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”™

Our Specialist Advisors: “The Dream Team”

Wade W. Slome, CFA & CFP – Chartered Financial Analyst & Certified Financial Planner, Master of Business Administration Cornell University, Author, Instructor at University of Irvine, Founder & President of 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 University 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 at W.S.W. Foundation.

Kevin D. Weaver, CFP – BS. University of Irvine, Certified Financial Planner, Vice President, Research and Operations at Sidoxia Capital Management LLC.