

VINTAGE GENEROSITY

TRUSTED ADVISOR MAKES IT EASY

Often, professional advisors turn to the Community Foundation to solve their clients' charitable needs. During the past year, we had the privilege of helping a remarkable woman settle her affairs during a difficult time on the advice of her trusted attorney. Patty Bogle was known for leading Bogle Vineyards to become a national wine powerhouse, but she was equally known for her generosity and genuine nature, and we are honored to help support her legacy.

As Patty's attorney, Kent Silvester of Boutin Jones Inc., said *"I have been fortunate to work with Patty Bogle and her family, along with her close advisor/CPA, Marc Battaglia, on succession, business and estate planning matters. It was important for Patty to support several charitable causes that were close to her heart, one benefiting the Clarksburg area and another promoting vineyard research. We discussed various options to accomplish her charitable goals, and I suggested establishing a fund at the Sacramento Region Community Foundation."*

"Patty hoped to involve family and friends in accomplishing her charitable goals. The Foundation's support allowed Patty to specify her charitable objectives and involve people she selected to oversee the process. Flexibility was an important consideration, and the fund was designed to adapt to changing circumstances. If Patty's objectives cannot be accomplished as she envisioned, the fund assets will be directed to other charities that Patty supported."

"Given Patty's medical condition, we needed to work quickly and appreciated the Foundation staff's ability to establish the Patty Bogle Charitable Fund within a few days. Patty did not want to burden her family with administrative tasks associated

with maintaining the fund, and she was glad that the it would be administered by the Foundation at a low cost. Patty thought it was pretty neat that her friends and family would work together in supporting charities. This is just one facet of Patty's wonderful legacy. Patty's children were so pleased with the Foundation that they established a second fund, the Bogle Family Charitable Fund, to allow family and friends to honor their mother while benefiting local charities."

