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THIS ISSUE

Estate Planning & Charitable Giving



GOOD FELLOWS FOREVER

by *Ginger F. Mlakar & Kerin Lyn Kaminski*
Introduction by *Raymond M. Malone*

To no one will we sell,
to no one will we refuse
or delay, right or justice ...

Magna Carta 1215

Last month, I had the opportunity to visit Washington, D.C., taking my two young daughters there for the first time. It's been a while since I visited Washington as a tourist. Among the many monuments, museums and sites that we visited was the U.S. Capitol. In the lower level of the Rotunda (the "Crypt") is a life-sized copy of the Magna Carta – a gift to the United States from England in 1976.

While the document is written in Medieval Latin, translations are plentiful. It struck me as quite remarkable that the principles set out in this document, which now is almost 800 years old, serve as the basis for the legal framework

of our society and government in the United States today. Many of our Constitutional rights are derived from the principles developed by King John's barons who were dissatisfied with his capricious rule.

A central tenet of the Magna Carta is the concept of access to justice for all. Last month, I wrote about the specific efforts and ways in which the Cleveland Metropolitan Bar Foundation ("CMBF") raises money, and sponsors and promotes programs designed to extend and afford the rights, privileges, and benefits of our legal system to thousands of persons to whom these rights might not otherwise be made available.

But justice is not free. And this is where the CMBF plays a role. This year, we have developed and are launching a new program to facilitate a planned giving program to provide legacy gifts to the CMBF to provide a permanent endowment for perpetual funding of the "Justice For All" programs of the Cleveland Metropolitan Bar Association.

Largely through the efforts of Co-Chairs of the Legacy Fellows Committee of the CMBF, Kerin Kaminski and Ginger Mlakar, I'm delighted to provide this platform for Kerin and Ginger to explain the program in the following portion of this article:

About the Legacy Fellows Program

We have met many lawyers who have battled discrimination due to race, gender, ethnicity, religion, and other reasons and have continued to succeed in law firms, the judiciary, and more non-traditional legal jobs. Despite all of their roadblocks, the common theme among them is that they were all hard-working, ultimately successful in their careers, and passionate about the legal community and in making a change so others would benefit from their efforts. Each of these lawyers believed in giving back to improve the legal community and the

It is very refreshing and humbling to see how many Greater Cleveland lawyers are willing to step up and come together for "justice for all," and carry out the mission of the CMBA.

Greater Cleveland community in general and accomplished this goal by volunteering their time and making a planned gift – a commitment to provide a gift in the future.

The CMBF recognizes that there are many lawyers, such as those just described, who are interested in continuing their legacy through a planned gift benefiting the CMBF. In order to honor and thank those lawyers, the CMBF has expanded its Fellows program to now recognize lawyers making a planned gift benefiting the CMBF by inviting them to join the Fellows program as a Legacy Fellow member. By becoming a Legacy Fellow member, these lawyers can join a growing number of distinguished past and current leaders in the legal community desiring to collectively pool dollars to make a positive change. Here are some quotes by some founding Legacy Fellow members describing why each made a planned gift benefiting the CMBF.

I Became a Legacy Fellow Member To...

“...Enrich our city through our significant community programs.”

– Barbara K. Roman

“...Provide financial support for programs that we deem to be vital to the community in which we live and in which we earn our livelihood.”

– Marvin Karp

“...Give back to the community and in so doing, better the lives of our fellow citizens.”

– P. Kelly Tompkins

“...Show my gratitude for the opportunity to practice law in this community.”

– Mary K. Whitmer

“...Help those not as fortunate as I have been.”

– Raymond Malone

“...Create a legacy of greatness for our profession and our community for the long haul.”

– Hugh E. McKay

“...Fulfill an obligation all lawyers have to bring fair opportunity to as many people as possible and particularly to those in need.”

– Kerin Lyn Kaminski

“...Continue to help for years to come.”

– Bruce G. Hearey

“...Truly ‘make a difference’ in the lives of those who benefit from the outstanding programs we support.”

– Michael Ungar

“...Support programs which foster lawyer involvement in the leadership, education and enrichment of our community.”

– Lynn A. Lazzaro

You too can join these leaders in ensuring the sustainability of the CMBAs community outreach programs, including its nationally recognized and highly successful 3Rs program, in which over 500 volunteers teach 10th grade civics in the Cleveland schools; mock trial competitions; the Cleveland Homeless Legal Assistance Program; and other pro bono programs. In order to become a Legacy Fellow member, you simply need to inform the CMBAs Director of Development, Mary Groth, at (216) 696-3525 that you have made an estate or planned gift benefiting the CMBF. At that point, you will be invited to Fellows events and other VIP receptions, celebrating the great community service provided by our members and shared high standards of integrity and professionalism, and recognized in the CMBA and CMBF publications and communications. However, the CMBF will keep your name confidential if you wish to remain anonymous.

What are some examples of estate or planned gifts? One simple type of planned gift is a bequest in a will or a specific gift in a trust benefiting the CMBF. Another method is to provide for the CMBF by beneficiary designation for life insurance, retirement plans, transfer on death real estate deeds, payable on death bank accounts, and transfer on death security accounts. If you prefer to receive a life-time stream of income with the remainder benefiting the CMBF, then you could consider a charitable gift annuity or a charitable trust. Many of these planned gifts provide income and estate tax advantages to them. In order to understand your specific tax advantages, you should consult with your estate planning attorney or tax advisor. The CMBF has a planned giving brochure providing sample language for a bequest in a will, specific gift in a trust, or beneficiary designation providing benefits to the CMBF. Additionally, the CMBA website has more information on how you can support the CMBF at www.clemetrobar.org.

Since the unveiling of this new Legacy Fellows program, we have received an overwhelming amount of support and leadership on this initiative by Past and Current Presidents and Board members of the Cuyahoga County Bar Association and Foundation, Cleveland Bar Association and Foundation, and the Cleveland Metropolitan Bar Association and Foundation along with the CMBAs members in general. It is very refreshing and humbling to see how many Greater Cleveland lawyers are willing to step up and come together for “justice for all,” and carry out the mission of the CMBA—“[t]o promote ..., sustain and improve the quality of and public trust in the administration of justice and the legal profession, and enhance Greater Cleveland through

... civic and community service and leadership.” We hope you will join us and become a Legacy Fellow member!



Raymond M. Malone is the president of the CMBF. He is a partner at Baker & Hostetler LLP, and has over 20 years' experience in the employee benefits and executive compensation areas. He can be reached at (216) 861-7879, or rmalone@bakerlaw.com.



Ginger F. Mlakar is Director of Donor Relations at The Cleveland Foundation. She is Treasurer & Co-Chair of the Planned Giving Committee for the CMBF. She can be reached at (216) 861-3810, or gmlakar@clevefdn.org.



Kerin Lyn Kaminski is Co-Founder of Giffen & Kaminski, LLC. She is a past president of the CMBA. She is Co-Chair of the Planned Giving Committee of the CMBF. She can be reached at (216) 621-5161, or kkaminski@thinkgk.com.

LEGACY FELLOWS

Bruce G. Hearey

Kerin Lyn Kaminski

Marvin L. Karp

Alan S. Kopit

Lynn A. Lazzaro

John D. Liber

Raymond M. Malone

Hugh E. McKay

G. Christopher Meyer

Ginger F. Mlakar

Susan L. Racey

Barbara K. Roman

Carter E. Strang

P. Kelly Tompkins

Michael N. Ungar

Mary K. Whitmer

Margaret W. Wong

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