



# FOUNDATION HIGHLIGHTS

*The ARMA International Educational Foundation (AIEF) is a non-profit organization dedicated to funding research and education in the records and information management field, is dependent on its endowment fund. All initiatives funded by the AIEF Endowment come from the interest proceeds of the endowment contributions of individual records and information management professionals, ARMA Chapters and vendor partners who recognize the importance this work.*

## **AIEF Board of Trustees:**

**Preston Shimer – Administrator**

**Patricia Vice - Chair  
Susan Whitmire – Vice Chair  
Janis L. Adams - Treasurer**

**Bryan Corbett  
Larry Eiring  
Timothy Ericson  
Gary Lewis  
Donna Rose  
Juanita Skillman**

**Ex Officio:  
Marry-Ellyn Strauser**

**Honorary:  
Jean Brown  
Mavis Eppes  
Deborah Marshall**

## **Conference a Success for AIEF**

ARMA International's San Antonio Conference was a great success for AIEF on all fronts.

- \* The sessions introducing our two new research projects were filled to capacity and many attendees stopped by the Foundation Booth on the Expo Floor to meet and talk to the authors.
- \* The first ever AIEF Scholarships were presented at the Awards Night to Wendy McLain, a doctoral student from Louisiana and Catherine Yasui, a master's candidate from Vancouver, BC.
- \* The winners of the raffles for registrations to next year's conference in Baltimore were Alida Tuzovic from Boston, Lorraine Anderson for the Metro NYC Chapter, and Lou Jimenez from Sacramento, CA. Over \$3,000 was raised by the raffle. Thank you to all participated.
- \* The Clancy Clan Golf Tournament was a fun success, golfers and "watchers" enjoyed the fellowship of the evening and raised \$3,900 for the Foundation.
- \* The New Expanded Silent Auction took in over \$5,000 with 75 items up for sale. Two Regions, 29 Chapters, five Vendors and 12 individuals as well as Leadership from the ARMA Board of Directors, ARMA Headquarters and Executive Committee all contributed items for the auction. The Great Lakes and Pacific Regions tied with the most chapters participating in the auction. Marilyn Payne, Kim Kenny, David Culbertson, Mark Stephens, Jan Adams, Pilar McAdams, Ginny Jones, Vicki Lucero, Jociel Brooks and Helen Streck all served as volunteers to make the New Silent Auction a success.

An unexpected, but welcome donation came from Laurie Carpenter, Koch Industries who won the prestigious ARMA/Iron Mountain Award for Excellence in Records and Information Management and donated her \$1,000 prize to the Foundation.

---

**ARMA International Educational Foundation**

[www.armaedfoundation.org](http://www.armaedfoundation.org)



# Foundation Highlights

## Announcing the 2007 “Share Your Legacy” Planned Giving Campaign -- Larry Eiring, Trustee

How would you like an opportunity to make a lasting contribution to our profession – records and information management – that would benefit not only the professionals of today, but tomorrow’s records management professionals as well? That opportunity is here now! At this year’s ARMA Conference in San Antonio, I had the honor of kicking off the ARMA International Educational Foundation’s 2007 “*Share Your Legacy*” Planned Giving Campaign. As a part of my presentation, I noted how much of an opportunity the campaign is for anyone to be able to help everyone in the records management profession, now and into the future, by supporting the ongoing educational efforts of the Foundation. Unlike other pledge programs through which cash contributions can be made to AIEF, the Share Your Legacy campaign allows you to designate a planned gift to the Foundation’s endowment. There are many benefits to taking this approach, such as:

No cash needed now!

- Assists you in your total estate planning
- May provide a lower tax for your heirs
- May reduce your estate’s capital gains and other inheritance taxes
- Allows you to make a lasting legacy for the future

A Planned Gift to the AIEF endowment can take many forms, including:

- Leaving AIEF as a beneficiary in your will
- Naming AIEF as a beneficiary in a Trust that you set up naming AIEF as a beneficiary on your IRA or 401K account
- Noting AIEF as a beneficiary on your life insurance or an annuity
- Making AIEF the beneficiary of a Charitable Gift Annuity

You can also designate direct gifts, such as stocks, bonds, real estate, business interests and art to the Foundation. In fact, almost anything of value can be designated as a planned gift to this campaign. The reality is that no matter how small or how large your planned gift is, it’s helping the Foundation build the endowment into a resource that will be self –sustainable. On top of that benefit, your planned gift will be used to support grants that will be utilized to help the Foundation fund such worthy endeavors as scholarships in records and information management, research on new and future trends and technology in the profession and valuable educational workshops, conferences and seminars. And the gift you give – the legacy you will leave – truly will help educate and grow the next generation of records professionals.

Leaving your legacy is easy to do. All it takes is a call or email to me at the contact information noted below. I can help you understand your planned giving options, talk more about the benefits to you and your family and add you to the list of distinguished planned giving donors. I was honored to designate 25% of my estate to the Share Your Legacy campaign and know that, when the time comes, those funds will be working to produce a better information society into the future! Why don’t you join me and be a part of the Share Your Legacy campaign today. You can call or email me at: Larry Eiring, CRM, FAI: 415-265-6838 and [leiring@littler.com](mailto:leiring@littler.com).

Remember, pledging to the 2007 Share Your Legacy campaign is designed to be a win-win for everyone involved.

### Watch Our Foundation Grow!

**Foundation Net Assets (Total pledge payments, operating funds from ARMA and one-time gifts from chapters and members) Less funded Projects and expenses:  
\$390,044.53**

**ARMA International Educational Foundation**

[www.armaedfoundation.org](http://www.armaedfoundation.org)