Donor Profile - Phil Klauber

A pioneer in senior care, St. Paul’s Senior Services is the recipient of a very generous legacy gift from San Diego philanthropist and civic leader, Phil Klauber. Mr. Klauber was moved by St. Paul’s founders and the vision and mission of serving seniors of modest means in the San Diego community.

Phil Klauber served for over 30 years as a Board member and donor. His philanthropy touched many of the programs of St. Paul’s, including St. Paul’s Villa and the Program of All-Inclusive Care for the Elderly (PACE). PACE serves 450 low income, frail seniors in their homes through comprehensive health and social services. Located in Bankers Hill, the Villa is home to 125 seniors in need of assisted living and memory support. Phil cemented his legacy with a $200,000 estate donation through the San Diego Foundation to be gifted to St. Paul’s.

“Phil’s service to our mission spurred our growth to become a prominent leader in senior care,” says St. Paul’s CEO, Cheryl Wilson. “His care and diligence as a Board member was a delight.” Phil’s daughter, Janet Klauber, has fond memories of how her father shaped St. Paul’s. “Dad wanted to ensure that future funding was available for organizations he believed in,” said Janet. “His endowment to St. Paul’s is a prime example of his philanthropic vision and leadership.”

Phil Klauber, who passed away in 2014, was a community treasure. He taught planned giving classes so that civic leaders understood the power of estate gifts and the impact they can make in improving our community for the greater good.

“Phil’s endowment is an investment in the future of senior care in our community,” says Todd Kaprielian, the Executive Director of St. Paul’s Foundation. “I think of those original visionaries who donated to St. Paul’s Manor back in 1962. A gift of $100 to serve 64 residents is now paying out dividends as we serve almost 1,000 persons every day.”
Estate Planning Group Network

It is common to find students and interns learning at one of St. Paul’s residential communities or at our PACE Centers. St. Paul’s has some of the highest standards in senior care offered in San Diego, and we want to share that expertise with the next generation of healthcare professionals.

This regard for excellence also extends to the field of estate planning. Thus, St. Paul’s began hosting the monthly Estate Planning Group Network breakfast meeting. The group meets in the St. Paul’s Community Care Center Café on the third Tuesday of each month from 7:30 to 9 a.m. Any professional in a related estate planning field — such as attorneys, private trustees, CPAs, financial advisors, geriatric care managers, senior residence directors, trust officers, insurance professionals, senior real estate specialists, residential senior referral agents and planned giving professionals — are welcome to attend.

The group is led by Yvonne Amrine, founder of Amrine Law, an estate planning firm. “The Estate Planning Group Network is about ethical practices and excellence in our field. Ethical dilemmas can surface at any time. It’s in those moments that I want the perspective of a professional in my field that I can trust to have a client’s best interests in mind. That’s what building a network and rapport is about at our meetings.”

A part of each meeting is devoted to a case study pertaining to older adults. Colleagues from different disciplines have the opportunity to share their viewpoints and help provide possible solutions to the real-life issues presented. There is a continuing education component to each meeting and an opportunity to learn from other professionals within the estate planning industry.

To RSVP for an upcoming meeting, please visit estateplanninggroups.com. If you have questions, please contact Liam Dunfey, St. Paul’s Planned Giving and Major Gifts Director, at 619-239-6900 or ldunfey@stpaulseniors.org.

Language Matters

If you would like to include a gift to St. Paul’s through a provision in your will or living trust, the following language may be helpful to your attorney:

X% (or dollar amount) of Donor’s Name estate should be designated to St. Paul’s Foundation, Tax ID #33-0627795

Did You Know?

According to Guidestar, an information service specializing in reporting on U.S. nonprofit companies, the average charitable bequest in the United States in 2010 was around $32,000. At St. Paul’s Senior Services, planned gifts of all sizes make an impact to ensure continuous quality care for San Diego seniors. Call today for more information on making a planned gift to St. Paul’s.
The St. Paul's Heritage Society is a group comprised of community supporters, caring individuals and families who value dignity, independence and choice at all stages of life. That is why they have designated St. Paul's in their estate plans. Currently, there are 23 Heritage Society members.

St. Paul's honored Heritage Society members at an annual appreciation luncheon at Bertrand at Mister A's. Guests enjoyed the gorgeous harbor view of San Diego's skyline and the fellowship of friends old and new. “We enjoy the fellowship among St. Paul’s supporters,” says Amanda and Charles Rines. “We look forward to this event every year to hear about the latest updates and how they impact our community, which reminds us why we're leaving a legacy to future St. Paul's seniors.” Following the reception, guests enjoyed a delectable lunch where Cheryl Wilson thanked this very special group for their commitment to St. Paul's by giving commemorative pins to new members.

In late 2014, former St. Paul's Marketing and Admissions Director, Liam Dunfey, began a new position at St. Paul’s as the Major Gifts and Planned Giving Director. “I’m working with current and future supporters so I can illustrate ways they can make an immediate and long-lasting impact on seniors in our community”, says Liam.

If you have already designated St. Paul's as a beneficiary, please inform the St. Paul's Foundation. We would like to include you as a member, keep you informed of the most recent developments at St. Paul's and to receive invitations to special events. The Foundation can also provide you with the information and resources you need while considering your estate planning options.

If you would like more information on the Heritage Society and Legacy program, or to learn more about how you can benefit from a variety of charitable gifts, please contact Liam Dunfey at (619) 239-6900.
Supporting Popular Programs at St. Paul’s

“How can I help St. Paul’s?” We often hear that question. People see we are providing housing and healthcare services to seniors who are of modest means or low-income, and they want to help. There are four unique programs and services at St. Paul’s that donors can support throughout the year:

- Scholarship funds for longtime residents who outlive their resources
- Transportation for residents to medical appointments, grocery/department stores, and community outings
- Chaplain’s Program to fund pastoral care for residents of all denominations
- Furnishings for PACE participants needing supportive housing

If you’re interested in learning more about these programs, please call the Foundation at 619-239-6900.