

Monday with Mikey: November 7, 2016

A TRUE STORY

From October of 2006 through December of 2007, I served as the sales manager for the Chicago mercantile Exchange ("The MERC") office of what was then Smith Barney. Part of my responsibilities was training new Financial Advisors. I was on a leave of absence from my home Rotary Club (Dunedin North), and I "made up" as often as I could at THE Rotary Club of Chicago on Tuesdays for lunch.

One Tuesday, as I was bundling up to face the Chicago winter winds that blew off Lake Michigan into "the Loop," one of my "rookie brokers" asked me if I thought he should join Rotary. My response was, "Sure. If you're joining for the right reasons – people don't care how much you know until they know how much you care."

My reasoning for this came from one of my professional mentors, Gail Ashley, the woman who introduced me to Rotary – and then promptly told me that I couldn't join her Rotary Club because SHE was the stockbroker in that club! She did, however, introduce me to Alex Ayescue, who proposed me for membership. Both Gail and Alex admonished me with those wise words that I shared with that young financial advisor fourteen years later.

Henry A. "Hank" Becker was a World War II Navy Veteran. He was a retired banker – actually a savings and loan president – from northern New Jersey. And he was a Rotarian in Dunedin North, having joined there when he retired and moved to Florida. Hank caught up with me after one of our club meetings and asked me if I would handle his family's investments. I had truly never prospected Henry's business; ours was a relationship of mutual respect. Henry became one of the many 'senior Rotarians' who played a large part in my becoming the Rotarian – and the person – that I am today.

Hank and his wife, Lydia, worked with their attorneys –both from our Rotary Club – and me to build their estate plan, part of which included a Charitable Remainder Trust. Although Hank was a "Multiple Paul Harris Fellow," the Beckers believed they should only make major donations to charities after (as we say in my profession) "no longer had need of the money."

After they had both passed away, the duty of informing the various charities of the distribution of the assets in the Becker Family CRT fell to me, at the direction of their eldest son, who is trustee of their affairs. Part of this distribution was a generous donation to Polio Plus and another to a program called "Gift Of Life International," which performs cardiac surgery for indigent children here and around the world. By working with Debra Lowe, our Rotary Zone's major Gifts officer, I was able to arrange for the Gift of Life Contribution to flow through the World Fund of the Rotary Foundation in the form of a Global Grant to build a juvenile cardiac care clinic in Uganda.

Because of Henry and Lydia's generosity, they have been cited as Major Donors to The (Our) Rotary Foundation. I will be flying to New Jersey next week to present TRF Major Donor recognition to their two sons, one of whom is a Rotarian. It has truly been a life-changing for me to had had the opportunity to learn, grow, and work with the Beckers and their family.

No one cares how much you know until they know how much you care.

Did I mention that November is Our Rotary Foundation Month?

Until next Monday, keep "**Doing Good, Having Fun!**"
Your Friend in Rotary Service,

Mikey

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Citrus, Hernando, Pasco, and Pinellas Counties
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