

MEMO TO FILE

RE: TRIP TO CHICAGO A.C.Y.O.A. CONVENTION - 9/2-9/5, 1981

FROM: JOHN TOM SCHIAVONE

DATE: SEPTEMBER 10, 1981

I flew to Chicago on Wednesday evening to assist Archbishop Torkom Manoogian in making appointments and for making solicitations, cultivation visits and visits with pastors. A detailed report of each solicitation, cultivation visit or contact made is contained in a memo to file under the following headings:

Mr. Armand Avidisian
Mr. & Mrs. Raffi Hovanessian
Mr. & Mrs. Kegham Gerogosian
Mr. & Mrs. Haig Pedian
Mr. Rupen Terzian
Mr. Onnig Norhad

Also I conversed with two pastors: Reverend Father Untzag Nalbandian - Pastor of St. John Armenian Church, Greenfield, Wisconsin. He was completely unfamiliar with this program and seemingly apprehensive about having yet another fund-raising effort in the diocese. He seemed to construe the Endowment Fund to be the main Diocesan fund raising fixture. I explained the purposes of the Archbishop's fund and gave him a cost statement. He was cordial but seemed generally suspicious;

The Very Reverend Varanjian Dz. V. Kabaradjian, Pastor, St. James Armenian Church, Evanston, Illinois. He is a friend of the Archbishop, seemed well-aware of who I am and what I'm doing. He provided me with the names of two of his parishioners, both physicians, who might be prospects. He seemed, in effect, generally well-disposed to our campaign and eager to assist.

In all, our visit to Chicago gave us the unexpected advantage of being able to make leadership visits that we would not have been able to do until far into the campaign. In all we made three solicitations, two cultivation visits, three telephone contacts and two visits with pastors.

M E M O R A N D U M

TO: Archbishop Torkom Manoogian

FROM: John B. Cummings

DATE: September 17, 1981

RE: FOUR BASIC TYPES OF BEQUESTS

THE BEQUEST

The most popular and convenient way of making a planned gift to the Armenian Diocese is through a will. Naming the Diocese as a beneficiary can:

- * provide estate tax savings for heirs.
- * allow full use of assets during one's lifetime.

Tax Savings

With a bequest, the Diocese benefits from the full amount given while at the same time a donor's estate enjoys the benefit of a tax saving. No Federal estate tax liability is incurred on a bequest to the Diocese. The value of a bequest, whether it is a specific, residuary, or trust remainder (if the trust is a charitable remainder unitrust or annuity trust as defined in the Tax Reform Act of 1969), is deductible in determining the taxable estate. There is no limit on the amount of the charitable deduction. A bequest to the Diocese will reduce the size of the taxable portion of a donor's estate and thus the size of the Federal estate tax liability.

FOUR BASIC TYPES OF BEQUESTS:

General Bequest

Directs that a specific amount of money or a named percentage of the total value of an estate be paid to the Diocese.

e.g., "I give, devise and bequeath to the Diocese of the Armenian Church of America for its general purposes (the sum of \$ _____) or (a sum equal to _____%) of the value at the time of my death of my gross estate passing under this will."

Specific Bequest

Leaves a particular named real or personal property.

e.g., "I bequeath to the Diocese of the Armenian Church of America, for its general purposes, my (painting known as _____, my stamp collection, my coin collection, fifty (50) shares of common stock in ABC Corporation) which is now located at _____."

Contingent Bequest

Names the Diocese of the Armenian Church of America as a beneficiary of a specified amount of assets only in the event the the first named beneficiary should predecease the individual making the will. This assures that the property does not go on to an unintended beneficiary.

e.g., "I leave \$10,000 to person X, but if he predeceases me, it should be given to the Diocese of the Armenian Church of America, for its general purposes."

Residual Bequest

Leaves the Diocese of the Armenian Church of America all or a portion of those assets remaining in a donor's estate after all general and specific bequests and all debts, administrative expenses, including death taxes have been paid out.

e.g., "All the rest, residue and remainder of my estate, real and personal, of whatever kind and wherever situated, herein referred to as my residuary estate, I give, devise and bequeath to the Diocese of the Armenian Church of America, for its general purposes."

Codicils

A prospect may already have a will. A prospective donor may, however, amend it by a codicil to provide for yet other purposes. A codicil is a modification of a will.

Consult an Attorney

The information mentioned here are only ideas and suggestions. They should be used only with the advice of an attorney.

Periodically, especially when a major change occurs in one's life, (for instance, marriage, birth of a child, retirement, death of a spouse or beneficiary), it is wise to review the provisions in the will to be sure they are consistent with personal wishes and current circumstances.

MEMO

TO: FRANK A STONESON
FROM: LINDA HOVHANESIAN
DATE: JAN. 5, 1983

REGARDING: ARCHBISHOP'S PACESETTER FUND

- A. Attached is a draft of the Pacesetter reminder letter. This will have to be sent to everyone except Leon Peters and David Shakarian, the only ones who have responded as bona-fide Pacesetters (so far).
- B. The Archbishop's Pacesetter Fund Thank-You letter went out to
Warren Ajemian)
Jon Simonian) formerly Archbishop's Fund category
David Shakarian
Leon Peters
- C. This same letter (attached) will be sent by Kim to:
Robert Buchakian)
Leila Karagheusian) formerly Archbishop's Fund category
- D. All future payments by Archbishop's Fund people will be sent thank-you notes by Kim (same letter as above).
- E. I will keep card file and manila files on Archbishop's Fund people. Kim will keep card file on Pacesetters and will keep track of them.
- F. I will keep you posted on all Archbishop's Fund-'82 people who send payments in future. Kim will keep you posted on all Pacesetters who respond in future.

If there are any changes to be made in any above the above statements, please advise.

THANK YOU,

Linda H.

cc: Kim Dorian

FAS

This letter ~~is~~ to be sent to

- a) Robert Buechler
- b) Leta Karghessian

Both former Archbishops' Fund donors.

-UH
1/5/83

□

□

Dear □ :

We wish to express our deep appreciation for your ^{the} swiftness of the reply and the generosity of the donation you have made in the amount of □ .

As you know, St. Vartan Cathedral and the Diocesan Complex depend on many varied fund-raising activities in order to continue their important work. We are proud to say that the contributors to our Archbishop's Pacesetter Fund are among the most open-hearted and vitally committed individuals to our cause. Your participation is indeed recognized by your being one of those dedicated people who are supportive of our work here at the Diocese. This encouragement allows us to try much harder in our daily endeavors for our beloved Armenian Church and for its people.

Once again, we thank you for your gift which will go far in helping us to preserve what the generations of Armenians in this country have worked so hard to build, and to continue meeting the challenges of changing times with confidence and success.

Respectfully yours,

Frank Avakian Stoneson
Executive Director

FAS:kd
Enclosure. Receipt No. □

12 August 1991

MEMO TO: Syraun
SUBJECT: ARCHBISHOP'S FUND - Pacesetters

The following names (donors) have been given to George Papalian to be included on the Archbishop's plaque in Kavookjian lobby:

GEORGE and CATHERINE PAPALIAN
25 Wood Oak Drive
Westbury, New York 11590
516-944-7934
Donation: \$5,000.00

MRS. ESTHER BODOSSIAN
98 - 01 67th Avenue
Forest Hills, New York 11374
718-459-8486
Donation: \$5,000.00

ST. VARTAN CATHEDRAL GUILD
Donation: \$5,000.00

I have made the files and given them to Darla to be filed with the Archbishop's Fund Pacesetters files... I don't have copies of their actual donations nor any correspondence on the above, so I have put a copy of this memo in each file as a reference.

The above names are being added to the plaque through George Papalian when he discusses the plaque for the Stewards.

Kohar

cc: Darla

F.
9 August 1991

sb/
Memo to: George Papalian
Mary Biberian

SUBJECT: STEWARDS PLAQUES

BPC Industries is the firm that does the engraving for the Archbishop's Pacesetters plaque in Kavookjian lobby (212-473-1630).

* a copy of a former invoice is attached for your information

I have confirmed a meeting for 11:30 a.m. Wednesday, 14 August, for you and MR. SHAN KUMAR of BPC. He will bring samples of the various types you may choose from for the Steward Plaque and will go over any other details you might have.

Regarding the ARCHBISHOP'S PACESETTERS PLAQUE - Mr. Kumar is aware of the following correction that is to be done at no charge since the error was theirs and also the additional names that are to be added to the plaque:

A. CORRECTION TO READ: Arax Chirkinian

B. Additional names to be added:

1. George and Catherine Papalian
2. St. Vartan Cathedral Guild
3. Mrs. Esther Bodossian

Please make sure Mr. Komar is given this information and thanks....

Kohar

LIFE STEWARDS

DOLORES ZOHRAB LIEBMANN

GEORGE K. PAPALIAN

CATHERINE B. PAPALIAN

ALEX MANOOGIAN

MARIE MANOOGIAN

RUPEN L. SADDLER

BERJOOHY HAIGAZIAN

LEILA KARAGHEUSIAN

ACABE BOORNAZIAN

ROXIE BOORNAZIAN

EDWARD PETERS

BARBARA PETERS

NISHAN APELIAN

ELIZABETH APELIAN

ARMINE ZAWBAK

PETER AJEMIAN

ANN AJEMIAN

LUCY JAMIE BONGARZONE

DR. ARISTAKES KACHADOURIAN

VICTORIA AVAKIAN

ASBED B. ZAKARIAN

MARGARET M. ZAKARIAN

ALICE KHAVLIJIAN

ALICE N. BASHIAN

MARY ALBES MIKAYELIAN

ARTHUR A. MIKAYELIAN

LUCILLE KIMATIAN

ALEX DADOURIAN

VIRGINIA DADOURIAN

HAIG R. DADOURIAN

ASTRID DADOURIAN

PETER DADOURIAN

BARBARA DADOURIAN

SARA DADOURIAN

STEPHANIE BERBERIAN

ANAHID BOJEKIAN

GARABED KOUZOUJIAN †

AGHAVNI KOUZOUJIAN

MISS ARMEN MATOSSIAN

PAUL DER BOGHOSIAN

SUREN D. FESJIAN

MARY SELVINAZIAN

GEORGE JAVIAN

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← a cross