



*The Award Winning*

## ***Malibu Rotary Club Surfwriter***

April 13, 2016

Official Newsletter of the Rotary Club of Malibu  
Malibu Rotary Club President David Zielski

Edited by Dr. John W. Elman  
Pictures by Dr. John W. Elman

In This Issue (click underlined topics for web link when connected to the Internet)

- Last week Financial Adviser Kristofer R. Gray and Lockwood Holmes of Integrity Financial Corporation discussing the Malibu Rotary Charitable account
- Other News and Guests at Last Malibu Rotary Club meeting
- Next Regular Malibu Rotary Club Meeting April 6 at Pepperdine Graduate Campus Room LC 152 with fellowship at 11:30 a.m. and meeting at noon. Speaker Will be Glenn McConnell, a 48 year veteran of the LAPD who will be talking about "A Police Officers's Devotion fo Community and Service to God"
- Malibu Rotary Club Supports RainCatcher.

Check [Calendar](#) on Malibu Rotary website [www.maliburotary.org](http://www.maliburotary.org)

- Rotary International Website: [www.Rotary.org](http://www.Rotary.org)
- Rotary District 5280 Website: [www.rotary5280.org/](http://www.rotary5280.org/)
- RI President (2015-2016) K.R. Ravindran

- **Rotary District 5280 Governor (2015-2016): D.J. Sung**

**Financial Adviser Kristofer R. Gray and Lockwood Holmes of Integrity Financial Corporation discussing the Malibu Rotary Charitable account**



**Kristopher Gray, is a Certified Financial Planner, and Lockwood Holmes, Jr is CEO of Integrity Financial Corporation in Malibu. Malibu Rotary Club President David Zielski wanted them to analyze the Malibu Rotary Club Charitable Trust Account currently held at Crowell Weeden. At the Malibu Rotary Club meeting April 13 both Kris and Lockwood were on hand to give their opinion how the Malibu Rotary Club account is doing and what they would do differently.**

The Malibu Rotary Account is currently worth about \$46,000. Kris said that investments in charitable account like this should be both safe and liquid. It should have only about 50% in equities. Currently too much of the money is in equities. This makes the account too volatile likely to lose money in a down market. He notes that most of the equities are in Class A Mutual Funds. These type mutual funds have front loaded commissions. If given the chance to monitor the account Kris would put more in fixed income. Kris would invest in Smart Beta funds to smooth the risk. There are new computer models and scores available now compared when the Rotary Club opened the account about 20 years ago.

As financial advisors who are not stock brokers Kris explains that his firm makes no money on anything that is bought or sold. Their annual consulting fee 1 % of the value of the account. By prudent investing, a constant watchful eye, Kris believes he can grow the account with less risk.

Several in the club were pushing to transfer the account t Integrity Financial if either Kris or Lockwood or both became member of the Malibu Rotary Club.

## **Other News and Guests at Last Malibu Rotary Club meeting**

An idea coming out of the March 23 meeting was one suggested by Bianca Torrence for Thanksgiving morning—a Turkey Trot Run. Mark Person had a contact person who might be able to help with the logistics of putting this on—and more discussion will be forthcoming on a planned Thanksgiving morning Malibu Rotary Club sponsored or cosponsored Turkey Trot 5k-10k run and walk at Trancas Beach. There was a special meeting scheduled at the Chamber office with members of Rotary to find out more about having the run, which Rotarians attending found very promising. Barefoot Alberto, who is in charge of Malibu Marathon was at the April 13 meeting and said he would help out in several ways, such as promoting the Malibu

Rotary Turkey Trot at the same time he is promoting the Marathon, with promotion flyers and publicity.

**Delvin Glymph** attended the Rotary Global Grants Workshop, and at least Delvin and Malibu Rotary Club President David Zielski will be certified for District Grants.

**Post meeting news** On Sunday April 17<sup>th</sup> there was a 7.1 magnitude earthquake in the Quito, Ecuador area, which is where Malibu Rotary member **Pompeya Monteros** is. Her condominium on the beach there is near the epicenter. Bill Wishard, whose daughter is married to Pompeya's son, told us that both Pompeya and her home survived the quake.

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### **Guests**

Guests at the April 6<sup>th</sup> Malibu Rotary Club meeting included PDG **Tom Bos** of the Rotary Club of Holland, Michigan, was attending his last Malibu Rotary Club meeting of season. Departing back to his other home Michigan after joining the Malibu Rotary Club for the winter. Other guests included the aforementioned **Alberto**, speakers **Kristopher Gray**, **Lockwood Holmes, Jr**, former Rotary ambassadorial Scholar **Livia Giordana** (who was staying with Margo Neal while she is in town) and former Malibu Rotary Club member **Hubert Luckerath**.

### **Malibu Rotary Club Supports RainCatcher**

David Zielski, Executive Director of Raincatcher makes regular trips to Uganda and Kenya for new Raincatcher installations and maintenance of those previously installed.. More about Raincatcher can be seen on its website Raincatcher.org. A link to Raincatcher video is on the Maliburotary.org website. The direct link to the video is at:

<https://www.youtube.com/watch?v=59rzOcM-RL0&list=UUFetq8NgjhXhtkVf0idcQUg>

# Calendar

(for details on these programs see Calendar on [maliburotary.org](http://maliburotary.org))

Glenn  
McConnell

Apr 20,  
2016

A Police Officers's Devotion fo Community and Service to God  
Glenn McConnell has been a police officer for 48 years--he also a minister.  
trafficking. He also can give us advice on what to do if we find ourselves in  
the commuity and God.

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- See more at: <http://portal.clubrunner.ca/2529/Speakers#sthash.jvO99BAs.dpuf>