

THE GOLDEN rotarian

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LA JOLLA GOLDEN TRIANGLE ROTARY CLUB'S NEWSLETTER

FEBRUARY 28 2025

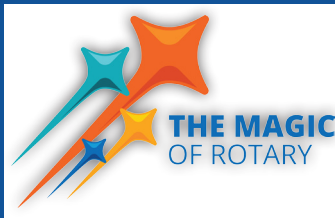


Rotary

ALEXANDER MONROE, AIF[®]
SENIOR VICE PRESIDENT/INVESTMENTS
WEALTH MANAGEMENT

LUKE ERVIN CIMA[®], CEPA[®]
SENIOR VICE PRESIDENT-WEALTH
MANAGEMENT / UBS

GARRY KACHKOVSKY, CFP[®]
FOUNDING PARTNER OF
KACHKOVSKY & FISHER, INC.



RI President 2024-25
STEPHANIE **URCHICK**

District 5340 Governor 2024-25
DIANNE **CRAWFORD**

LJGT Rotary President 2024-25
LUKE **ERVIN**



ECONOMIC OUTLOOK 2025 OUR ROTARY EXPERTS SHARE THEIR PERSPECTIVES AND TAKE YOUR QUESTIONS ON ISSUES IMPACTING THE ECONOMY

AOS MEETINGS AND SOCIAL EVENTS

- 1st Friday of the Month.....Community Services Committee
(follows club meeting)
- 2nd Friday of the Month..... International Services Committee
(follows club meeting)
- 3rd Friday of the Month..... Youth Services Committee
(follows club meeting)
- 4th Friday of the Month.....Peace Committee
(follows club meeting)



Alex launched his career nearly 20 years ago with Thornburg Investment Management in Santa Fe, New Mexico. He later joined Morgan Stanley in 2011. The opportunity to help Stifel expand into San Diego presented itself in 2015 and he and his team opened the second Stifel office in San Diego. Alex is a founding partner of The Compass Pointe Group, a full-service Wealth Management team. Alex and his team provide comprehensive wealth planning and investment strategies for high net-worth families, institutional endowments and foundations. Alex primarily focuses on tailoring asset and liability management strategies to meet specific goals and objectives. He also enjoys consulting in areas that include business succession planning, liquidity events, alternative investments, equity and interest rate risk management, family dynamics, philanthropy and wealth transfer strategies. Alex earned a Bachelor of Science in Business Administration from the University of Redlands. While in college, he was selected to attend the School of Economics at the University of East Anglia in Norwich, England. Alex attained the Accredited Investment Fiduciary™ designation and holds Series 7, 63, and 65 securities licenses. In 2024, Alex was recognized by Forbes as a Top Next-Gen Advisor. Active in his community, Alex stays busy coaching youth sports and keeping up with his four children and two stepchildren. When not with his kids or working, he is driven by philanthropic endeavors. His membership in the La Jolla Golden Triangle Rotary Club, where he was president in 2017 and 2018, has served as his conduit to give back. For fun, Alex enjoys traveling with his family, playing golf and pickleball, and hiking around San Diego County.

Luke Ervin, CIMA®, CEPA® is a Senior Vice President—Wealth Management and leads the Mission Family & Business Group at UBS. Luke oversees financial affairs for a select group of business owners, entrepreneurs, corporate executives, professionals, and their families around San Diego. For over 20 years, Luke has focused on helping clients achieve their financial goals through a comprehensive and holistic wealth management process.

With an expansive range of experience in wealth management, Luke has earned the Certified Investment Management Analyst® (CIMA®) and Certified Exit Planning Advisor® (CEPA®) designations. Luke and his team are passionate about assisting others through life's numerous financial stages, helping clients formalize a plan for their legacy and supporting them toward the realization of their goals, through a disciplined and tested approach.

Luke's specialties include financial and retirement planning, customized portfolio management, and lending and insurance strategies for business owners, entrepreneurs, and executives of privately-held growth companies. In addition, he guides business owners to drive growth and plan for a successful exit by leveraging UBS' resources and collaborating with other business advisors, often advising on employee benefits and cash management services.

Garry was born in 1975 and spent the first ten years of his life in Moscow, of the then U.S.S.R. In the early 1970's Soviet Union was going through a pretty severe food shortage. The U.S. government essentially brokered a deal to swap 250,000 Russians and their families for American wheat. The Kachkovskys were one of those families approved to leave the country, but with Soviet invasion of Afghanistan in late 1979, the visa program came to a trickle. It wasn't until 6 years later that the family was again granted permission to leave and given two weeks to tie off any loose ends. So, with \$200 and two suitcases to their name, they thrust into the unknown. As a 10 year old boy, Garry really did not understand the gravity of the situation, leaving family behind whom he may never see again and going to a whole new country his family knew very little about. In those days, eerily similar to now, the Communist government kept a tight lid on the realities of democratic law and the capitalist economic structure. Having seen his family endure the heavy-handed authoritarian Soviet government and the personal mediocrity it produced, Garry became very attuned to those who were striving to achieve the American Dream and sought for ways to help. He appreciated the limited form of government he found in the U.S. and the opportunities to improve one's circumstances provided by capitalism. One way to help, he discovered, was through advising others concerning their finances. As a result, Garry began his career in the financial services industry in 1997, and has provided financial planning and investment advisory services to uniquely successful individuals and families ever since. Garry received his bachelor's degree from Illinois Wesleyan University in economics and Russian. He attained his CERTIFIED FINANCIAL PLANNER™ professional certification from the College for Financial Planning.



REPORT

from the last meeting



UPCOMING SPEAKERS



2025

MARCH - SPEAKER

7.....Trace Wilson / Diane Kane
The movement to make
La Jolla its own city

21.....Marty Gorsich
Economic, civic and charitable impacts
of the Farmers Insurance Open
on San Diego

28.....Richard Kiy
U.S. Foreign Policy in the Western
Hemisphere: Regional Impacts in the
San Diego-Tijuana Border Region.

Rotarian of the Day

Robert Frost, born in San Diego and the youngest of five siblings, grew up in Point Loma where his family were active members of the San Diego Yacht Club. He developed a passion for sailing and scuba diving, which led to various adventures, including a memorable win at the 110 Nationals regatta in 1974. Frost graduated from the University of Oregon in 1978 with a BS in Business Management and was involved in the Sigma Alpha Epsilon fraternity. He married his college sweetheart, Kim Kellum, and moved to Utah, where he worked for Weyerhaeuser and enjoyed skiing.

In 1981, Robert returned to San Diego to join his family's lumber business, after attending Lumber Grading School. He now serves as President and General Manager of the 114-year-old company, which has earned recognition as one of San Diego's oldest businesses. Robert and Kim have lived in Encinitas for 38 years, raising three children: Nick, Ryan, and Kayla, and have four grandchildren with a fifth on the way.

Active in the community, Robert has held leadership roles in various industry associations and is involved in the San Dieguito Tennis Club. A Rotary member since 2004, he has participated in numerous community service projects. Outside of work, Robert supports his wife, a musician, often acting as her roadie. He continues to value his community service and looks forward to future contributions.

Announcements

Alex informed members that a previous announcement about the promote/demote event location was incorrect; the event will be held in Encinitas at Alex's house, not Liberty Station. He also discussed the upcoming May 16th fundraiser, emphasizing the importance of securing corporate sponsorships with two levels, \$500 and \$1000. The goal is to raise \$10,000, and Alex is offering to host a party if this goal is met. Members were encouraged to ask their business contacts for sponsorships, and assistance is available from Rich Papike, noted for his skill in securing donations.

Birthdays and Anniversaries: Celebrations included **Carolyn Fritz's** birthday on 02/21, **Sara Miceli** on 02/23 and **Doug Deer** and **Jan Percival** on 02/25 and Rotary anniversaries for **Susan Brown** (14 years) and **Eric Mjoen** (16 years).

New Member Induction

Nil Saric's Induction: **Neil Saric** was inducted into the La Jolla Golden Triangle Rotary Club. **Carolyn Fitz** highlighted Nil's long association with Rotary, noting that both of his parents were Rotarians, and he described himself as a "Rotarian baby." Nil has been involved with Rotary for years, including participating in Rotoract in Ankara and serving at the district level in Maryland. Neil expressed gratitude, saying, "Thank you very much for accepting me, understanding me, having me as a member and a friend."

Student of the Month

Stacy Rosales: Mario introduced **Stacy Rosales** as the Student of the Month, praising her academic improvement and exceptional service work. Stacy has been actively involved in multicultural events and service projects. Despite challenges in 9th and 10th grade, she excelled in 11th and 12th grade. Stacy expressed her gratitude for the recognition, stating, "Volunteering has been a great way to meet new people and understand more about them." Her advisor and family were also acknowledged for their support.

Guest Speaker

Dr. Danielle Halsey - Hub SeaWorld Research Institute: **Dr. Danielle Halsey**, Chief Science Officer at Hub SeaWorld Research Institute, provided a comprehensive overview of the institute's mission, history, and cutting-edge research initiatives aimed at fostering a sustainable relationship between humans and marine environments.

Introduction and Historical Context: Dr. Halsey began by tracing the origins of Hub SeaWorld Research Institute back to 1963, when it was founded as the Mission Bay Research Foundation by Milt Shedd, one of SeaWorld's original founders. He envisioned a dedicated research body to study marine animals in proximity to SeaWorld, aiming to leverage this access to deepen understanding of marine biology and ecology. In 1977, the institute was renamed to honor Carl and Laura Hubbs, distinguished marine scientists known for their contributions to oceanography and fisheries research.

Mission and Vision: Dr. Halsey emphasized that the institute's guiding mission is "to return to the sea some measure of the benefits derived from it." This mission underscores their commitment to applying scientific research to mitigate human impacts on marine ecosystems. The vision, she noted, is a world where humans and marine life coexist and thrive, a goal increasingly vital as human populations grow and pressure on marine resources intensifies.

Core Research Programs: Dr. Halsey detailed the institute's four primary research programs, each tackling distinct challenges in marine conservation: **Animal Behaviour Program:** This program explores marine animals' communication and behavioral adaptations to environmental changes. Dr. Halsey highlighted several projects:

Biodiversity Monitoring: The institute uses low-cost technologies like video cameras and hydrophones to study how marine animals interact with human-made structures such as offshore wind turbines and aquaculture facilities.

Vocal Learning in Belugas: Researchers are studying how belugas and other marine mammals adapt their vocalizations in response to noise pollution, an essential factor in understanding how these species

communicate in increasingly noisy oceans.

Narwhal Signature Whistles: **Dr. Halsey** shared fascinating insights into research on narwhals in Greenland, where scientists have identified unique "signature whistles" used by these elusive creatures to communicate. This discovery aids in monitoring their populations amid Arctic climate changes.

Sustainable Seafood Program: This program focuses on enhancing fisheries management and developing sustainable aquaculture practices.

White Sea Bass Enhancement: A cornerstone project involves breeding and releasing white sea bass to bolster wild populations. Dr. Halsey explained the detailed process of spawning, raising, tagging, and releasing fish, emphasizing how this initiative contributes to fisheries recovery.

Integrated Aquaculture Systems: The institute is pioneering systems that incorporate seaweeds and shellfish to recycle nutrients from fish farming, promoting environmentally friendly aquaculture practices that yield multiple seafood products while enhancing water quality.

Ocean Health Program: This program, largely centered in Florida, addresses marine ecosystem health and resilience: **Marine Mammal Stranding Response:** Dr. Halsey highlighted the institute's role as first responders to marine mammal strandings, where they assess health issues like toxic metal accumulation and diseases such as avian influenza.

Seagrass and Shellfish Restoration: Collaborating with local stakeholders, the institute is advancing habitat restoration projects, aiming to produce over 240 acres of seagrass annually and support shellfish propagation to improve water quality in the Indian River Lagoon.

Wildlife Populations Program: Dr. Halsey's own research falls within this program, focusing on the movement patterns of billfish like blue marlin and sailfish: **Satellite Tagging and Movement Studies:** By deploying satellite tags, her team tracks these species' migrations, examining how environmental factors influence their behavior. This research provides critical data for fisheries management.

• **Closing:** Dr. Halsey was thanked for her presentation, and the club made a contribution in her honor to Big Brothers, Big Sisters of San Diego County.

Final Announcements

• Remaining Girl Scout cookies were available for purchase, and a meeting for Youth Services was scheduled immediately after.

~Reporter

Michael Slentz



PHOTOS FROM LAST MEETING



P, B & J Service Social | 523 sandwiches were made for Father Joe's Village




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LJGT ROTARY LEADERSHIP 2024 - 2025

PRESIDENT Luke Ervin
 VICE PRESIDENT Christy White Brook
 PRESIDENT ELECT (2025-26) David Chong
 PRESIDENT ELECT NOMINEE (2026-27) Jan Percival
 TREASURER Sharon Council
 SECRETARY Sandi Rimer
 PAST-PRESIDENT Christy White Brook



**ROTARIAN
 OF THE DAY**



**MARTY
 ROSENSTEIN**

As I enter my 50th year in Rotary I still look forward to the future of this lifelong relationship. On the outside, I may have lost a step or two and sometimes a name or word will take the long route on its way to my lips, but on the inside I feel unchanged and my passion for pursuing my Rotary service still burns as brightly as it ever has. I am strongly involved in my work at Preuss High School. Aside from the ongoing programs, I am constantly seeking opportunities and experiences which I can help bring to the kids to enrich their lives. Interact is the central attachment from which all other programs have emanated. Interact is strong with large membership and an enthusiastic faculty advisor, Ryan Scott. Aside from their school and community activities, they are communicating with their peers in Afghanistan, establishing a sister school relationship with a school in Japan, beginning an interchange with students in the State of Chihuahua Mexico, and are working with UCSD Rotaract on joint service projects. The Student of the Month program, which has been going on for 15 years, is strong and met with gratitude and anticipation by all at the school. Our continued involvement in programs promoting peace is expanding in several directions. Model UN, theater trips, and more continue.

On a personal side, except for some minor aches and pains Sharon and I consider ourselves quite lucky to remain physically and mentally secure as we approach our 54th anniversary. Our 3 daughters and their husbands are healthy and happy and our 5 grandchildren continue to thrive. Where we begin to feel our age is with our oldest granddaughter getting ready to go off to college. This year Sharon and I were fortunate to be able to travel a great deal. We recognized that the window of opportunity to do certain types of travel was beginning to close. With that in mind, over the past year, we travelled to Japan, went on safari in Kenya and Tanzania, and just got back from a trip where we combined exploring the Amazon with visiting South America and Antarctica.

I look forward to more of the same for the foreseeable future.



MARCH 2025

- March 7 - Dianne Day
- March 14 - Steve Balch
- March 21 - Ajay Asher
- March 28 - Ron Spillsbury



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