



Wed Aug 20, 2014

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Rotary@TucsonRotary.org --- /// /// --- (520) 623-2281



Service Above Self

We meet **WEDNESDAYS, 12:00 NOON - 1:20 PM**
DoubleTree Hotel
445 S Alvernon Way
Tucson, AZ 85711
United States

[Venue Map](#)

[Duty Roster](#)

[District Site](#)

Social Security; History, Myths, and Strategies

Posted by Patrick Zumbusch on Aug 14, 2014



With 8,000 or more new people each day qualifying for Social Security benefit payments, this Federal program impacts more than 63 million Americans. Financially speaking, the impact of this benefit is large but, unfortunately, the knowledge or comfort most people have about Social Security is rudimentary at best and confusion reigns.

The talk is to cover in executive summary, but key highlight form, the following areas;

1. A Brief History Recap of Social Security
2. How Payments Are Actually Calculated
3. Actions That People Commonly Do Wrong / Misunderstand
4. Some Strategy Examples for Optimizing Social Security

Pat Zumbusch – Biography

Patrick Zumbusch is the Principal of Wellspring Financial Partners, a Tucson-based investment advisory practice. His firm does individual financial plans / wealth management as well as provides education to company savings plans (401(k) / 403(b), etc.). A primary tenet of Pat's philosophy is that wisely planning for one's financial future investing is hard, but it does not have to be as hard as Wall Street makes it out to be. Wellspring currently serves more than 10,000 participants in 43 states.

Most of Pat's background was in running enterprises in the for-profit space. His coming to Tucson occurred in 1989 when he was hired as a President of a University of Arizona offshoot that measured lightning, an entity that was twice rated as one of the fastest growing private companies in the state. He later ran the Community Food Bank of Southern Arizona, where he saw first-hand the challenges facing families who are poor. His passion for helping families stems from that background and a rural Minnesota upbringing.

His educational background is a dual major in accounting & finance from Augsburg College, an MBA from the University of Chicago. He is a CPA (Inactive) & holds his CFP.

Weekly Program

Aug 20, 2014
[Pat Zumbusch](#)
Social Security; History, Myths, and Strategies

Aug 27, 2014
[Humane Society](#)
Companion Animals

Sep 03, 2014
[Jennie Grabel](#)
Mental Health Safe Space

Sep 24, 2014
NO MEETING - Replacement Dist. Conf.

Sep 25, 2014
Sept. 25-27 (DISTRICT 5500 CONFERENCE)

Sep 26, 2014
Replacement Mtg. - Dist. Conf. Lunch
At Hilton ElConquistador

Oct 15, 2014
Tucson Classics Car Show
Car Show Meeting

Oct 18, 2014
Tucson Classics Car Show

[View entire list...](#)

Upcoming Events

Grand Canyon Hike - Sept 2014
Grand Canyon - Phantom Ranch
Sep 17, 2014 - Sep 21, 2014

2014-15 District 5500 Fall Conference
Hilton El Conquistador Resort
Sep 26, 2014 - Sep 28, 2014

Havasupai Hike with RYE
Oct 09, 2014 - Oct 12, 2014

Rotary Clothes Closet Cleaning Day/Goodwill Indust
Nov 19, 2014 11:00 AM - 01:30 PM

San Carlos Trip
Dec 05, 2014 07:00 AM - Dec 08, 2014 06:00 PM

Mystery Editor - August 13, 2014

Posted by Ed Mystery on Aug 15, 2014

My meeting started with greetings from five smiling faces in the greeting line. I noticed more than a couple Red Badges in the greeting line, always good to meet new Rotarians!

The meeting started on a somber note. Fellow Rotarian MONTE CLAUSEN'S son, Clint, passed away unexpectedly. A moment of silence was held in honor of MONTE, Clint and their loved ones. I'm sure I speak for all Rotarians when I say our thoughts and prayers are with MONTE and his family during this most difficult of time.

Before starting my lunch of salad, lemon chicken and broccoli (my fav!), we were lead by CLIFF BOWMAN in a moving rendition of "Battle Hymn of the Republic", one of my favorite songs! Assisting him on piano was GARY HIRSCH. I always forget to thank GARY (or whoever is playing piano) for helping cover up my poor singing voice, so let me use this opportunity to say "Thanks!"

CAM MOORE (who evidently had a new haircut(?) high and tight) introduced us to guests and visiting Rotarians, including Maria Gadd, an exchange student who is visiting from Finland. Good luck Maria, learn and enjoy while here in Tucson!

A Happy Birthday shout-out goes to HUGH THOMPSON and ALANA VICK. HUGH shared some thoughts with us about his Rotarian experiences while traveling abroad, and ended with this excellent comment: "Service is nothing more than a gift of Love, and Love is all that matters." Well said! On a personal note, ALANA shared that she is quickly closing in on her final two weeks of "life in my twenties." So she's decided that, in the Chinese tradition, she is going to spend another year at 29!



We are honored to have two Paul Harris presentations, EMERY BARKER and SUZANNE LAWDER, along with two new members introduced, BRUCE RICHARDSON and BILL MESCH. Congratulations to all!



Our program was a presentation of TPD SWAT by Captain JT Turner. It was an interesting presentation, but perhaps the best part was when Captain Turner recognized fellow officer (retired) and Rotarian FRANK ZUNNO.

I'm sure I'm forgetting someone or something, but already running a little too long. See you all next week! ;)



President's Letter

Posted by Mary Martin on Aug 15, 2014

It is exciting being a part of a Club that does so much! Next week Tom Andrews is going to give us a brief presentation on our Bolivia Latrine project and Duke Duncan will be giving us an update on the Nogales Wheel Chair project.

Tom Andrews and his committee are working hard on putting together an awesome District Conference, so if you haven't registered yet, please do so. There will be great speakers, breakout sessions and the prosthetic hand works project. Remember that we will be dark on Wednesday September 24th, so you can attend the kick off lunch of the District Conference on September 26th as your replacement meeting. You can sign up for one or all of the various sessions. To Register for the conference, go to: www.d55002014fallconference.eventbrite.com.

Please keep Monte Clausen and his family in your thoughts and prayers as they mourn the loss of their son, Clint Clausen.

Thank you and I look forward to seeing all of you Wednesday and remember to bring a guest.

Rotary Leadership Institute

Posted by Dorinna York on Aug 15, 2014

At last week's meeting, Doug Woodard, District RLI Coordinator informed the membership of the upcoming sessions for 2014-15 and how our club needs to have more attendance this year. All Rotarians are encouraged to enroll in the Rotary Leadership

Board of Directors

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Sargeant-At-Arms
David Pashkow

Executive Director
Dorinna York

Our Sponsors



Institute. RLI simply is a way for members to deepen their understanding of rotary and through new insights and ideas --- energize and strengthen their club. You will find all the RLI information by going to the District 5500 website or <http://rlifiles.com>. The registration form is on the District 5500 website. Questions can be directed to Newt Johnson, Registrar at redsports@earthlink.net or Doug Woodard, RLI Coordinator at dwoodard@comcast.net.

Many thanks, Your RLI Team:

Doug Woodard, District RLI Coordinator

Julie Brinks, Publicity and Events Coordinator

Newt Johnson, Finance, Data Management and Registrar

ROTARY MAKE UPS

Posted by Dorinna York on Aug 15, 2014



If you miss attending a weekly Rotary meeting, the Rotary Office will send you a "We Missed You At Rotary" email letting you know we did not receive your name on the blue attendance sheets. In this email, we also encourage you to do a "Make Up" for that missed meeting. Make ups can be accomplished in many different ways: by attending another Rotary Club's meeting, any Rotary Committee meeting, a Rotary charitable function, a Rotary event, or by making up online with eClubOne found on our home page at www.tucsonrotary.org. Simply turn in a makeup card to the Rotary office, or send an email to rotary@tucsonrotary.org with the date of the missed meeting, along with the date and name of the makeup event. REMEMBER: In order for a Makeup to be accepted, it has to be 14 days before or 14 days after a missed meeting, no exceptions.

Please let the Rotary Office know if you have any questions about Makeups. Thank you.



Menu for August 20th at the DoubleTree

Posted by Dorinna York on Aug 14, 2014

Plated Salad - Fresh Green Salad with Ranch and Balsamic Vinaigrette Dressings

Roasted Pork Loin ~ Garlic & Herb Roasted Pork Loin served with Smoked Gouda Yukon Gold Whipped Potatoes, finished with Tree Pepper Jelly and Cinnamon-Raisin Demi. DoubleTree Chocolate Chip Cookies served Family Style, Coffee, Decaf or Iced Tea.

Vegetarian Option if reserved by Friday 2:00 p.m. ~ Vegetarian Strudel ~ Rolled and Baked Layers of Filo Dough with Grilled Vegetables and Ricotta Cheese, served with Chef's Choice of Beans.

Fresh Fruit if reserved by Friday 2:00 p.m.

Gluten Free Meals available by Friday 2:00 p.m.

Membership and Attendance

Posted by Dorinna York on Aug 14, 2014

Membership	Scholarship Cups		
Active Members	177	Cash Contributions	\$ 181.00
Active Members Attendance Exempt	52		



Total Active Members	229	Total Scholarship Cups	\$	181.00
Honorary Members	20			
Meeting Attendance - August 13, 2014		Raffle	\$	0.00
Members	108			
Active Members AE	17	Auction RCOTF	\$	0.00
LOA/Honorary Members	0			
Total Members Present	125			
Guests	14			
Guests of the Club	6			
Visiting Rotarians	2			
Total Meeting Attendance	147			