

# the HELICOPTER



The Rotary Club of Pensacola District 6940 Club 4248

## WEEK IN REVIEW 6/1/2021

The June 1, 2021 meeting of the Rotary Club of Pensacola was called to order at 12:03pm. This was a Zoom-only meeting, due to existing obligations at the Yacht Club, with 48 participants. President Sally Fox welcomed everyone, led the Four-Way Test, and reiterated her "REEFS" goals: Recognition, Education, Engagement, Fun, and Service. Rotarian Scott Sallis led the prayer and pledge.

Program chair Chris Kelly introduced the week's speaker, Carma McCallie, Director of Advanced Planning for Time Financial. She has more than 25 years' experience in estate and business planning. She talked about new tax guidelines and the questions many people have about recent changes to tax laws, wanting to dispel some misinformation. The American Families Plan contains a lot of proposals that will require funding, to provide income security to lower- and middle-class America. It would restore top marginal tax rate to 39.6%, from 37%, which would happen automatically in 2025 anyway. Current max capital gains in 20%; new proposal would raise that to match the top marginal tax rate, i.e. 39.6%. The big surprise is the idea of imposing capital gains tax to assets gifted or transferred at death by eliminating carry-over. It would also eliminate the 1031 exchange provision for real estate gains over \$500,000. President Biden is also investing in the IRS to step up enforcement and audits, under idea that high-net-worth individuals are currently able to evade paying their fair share. President Biden did not include proposed changes to gift or estate taxes in his budget. We are still finding out more from the Green Book about the president's priorities, and Congress will continue to float "trial run bills" to gauge reactions. We need to be careful as we plan that we don't run afoul of any new laws that might be retroactive when they take effect. Waiting to plan for changes could be detrimental for people with large estates; "a very large window is going to close." She recommends that everyone review their estate plans, life insurance policy, etc. Rotarian Margaret Stopp asked what percentage of Americans the tax changes would impact. The administration is firm that changes would only affect people earning \$400,000 or more annually, but people with more than

\$1 million in assets could also be affected by some proposals. There will be exemptions for "certain" family businesses, farms, etc. that have not yet been defined. Art Hufford asked about IRAs. Carma said there no currently proposed changes. The SECURE Act was a major point of conversation last year until COVID happened, but is expected to be a big deal again.

President Fox thanked Carma and let her know a book would be donated in her name to Oakcrest Elementary. Rotarian Jean Norman led Sunshine. She told a story about little Johnny who started eating dinner at his grandmother's house without a blessing. "I know we say a blessing at home, but we're at grandmother's house, and she can cook." She welcomed guests: Greg Boise with Boy Scouts; Dawn Rudolph with Sacred Heart Ascension; and Todd Scott, guest of the speaker. Jean told a story about a woman complained that her joints were too stiff, and a friend said she was "rolling them too tightly." She recognized the week's birthdays: Robert Stephens, Jack Klocke, and Bob Hart Jr. A priest was giving a children's sermon on vestments and asked "why do you think I wear this collar?" A child responded, "because it kills fleas and ticks for 30 days?"

President Fox asked for volunteers to serve on a district-wide committee on diversity. There is a Family of Rotary event at Wahoo Stadium on June 16. Free for members, and \$33 for guests. The change of command banquet will be on June 24 on the Pensacola Bay ferry. Nancy's Haute Affairs / Agapi will cater. This Friday is the deadline to submit nominations for the Sandra and Grover Robinson Awards. Hybrid meetings will resume next week at the Yacht Club. The Rotary International convention will be virtual on June 12-16.

Closing quote for Memorial Day by Abraham Lincoln: "Honor to the soldier and sailor everywhere, who bravely bears his country's cause. Honor, also, to the citizen who cares for his brother in the field and serves, as he best can, the same cause." Meeting adjourned at 12:49pm. Minutes submitted by Joe Vinson.

## WHAT'S HAPPENING IN ROTARY

**RSVP NOW For the Upcoming Family of Rotary Event at the Pensacola Blue Wahoo Stadium.** Join us for the Blue Wahoos vs. the Montgomery Biscuits at the Dignity Deck on June 16th. The event is free to all members and \$33. for each guest. Event Includes admission into the park, free buffet, non-alcoholic drinks, a Blue Wahoo baseball cap, group photo, club recognition, fun, and fireworks. Come be a part of this great event! [rsvp at rcopens@bellsouth.net](mailto:rsvp@rcopens@bellsouth.net).

**TIME TO RSVP for the Change of Command Banquet.** The event will take place on Thursday, June 24 onboard the Pensacola Bay Ferry. The event is free to members and \$35. for guests. The meal will be catered by Nancy's Haute Affairs and includes 1 complimentary cocktail/drink. Come be a part of the induction of incoming president Ed Wonders. Due to the requirements of the Pensacola Bay Ferry, the event is limited to the first 100 people, [RSVP at rcopens@bellsouth.net](mailto:RSVP at rcopens@bellsouth.net).

**Welcome New Member Marjorie "Marjy" Anders.** Marjy is a native of Tampa/St. Petersburg. She received her Bachelor's Degree from Tulane University, Masters's Degree from George Peabody College for Teachers, and Juris Doctor from Tulane Law School. Marjy has just retired from the States Attorneys Office, as the Chief of Juvenile Division. She has two adult children.

**The Pensacola Yacht Club meetings are now open to an unlimited number of people.** However is very important that you RSVP every week, between Wednesday through Friday at 5:00 pm.

**We will continue to have On-Line Zoom Meetings along with the In-person meetings at Pensacola Yacht Club.** You will continue to get a Zoom invitation every Monday. If you have any questions please feel free to give me a call. 850-619-0679. Chris

**Mark Your Calendar to connect with Rotary members worldwide** at the 2021 Virtual Convention: Rotary Opens Opportunities, 12-16 June. Registration is now open at a special rate of \$49. After 21 days you will pay \$65. Don't forget to visit the convention event page on Facebook to connect with others and stay up to date on event news and program highlights.

**You are now able to pay your quarterly Rotary Club dues with a credit card/debit card.** Please note a service charge will be applied to your payment. The link can be found on our website at <http://www.pensacolarotaryclub.org/payment>

**Promote your business by placing an ad in the Helicopter.** The Rotary Club of Pensacola will advertise your business in our weekly newsletter with ads running for a full month. Business cards \$250. 1/4 page \$500. 1/2 page \$750. To place your ad send the prepared document to [rcopens@bellsouth.net](mailto:rcopens@bellsouth.net) stating the size ad you wish to place. Proceeds to benefit the Rotary Club of Pensacola Foundation. **Since we will be meeting in person these ads will go to print.**

**It is not too late to make your annual pledge** to our local Foundation and Rotary International. If you need a pledge form, send an email request to [rcopens@bellsouth.net](mailto:rcopens@bellsouth.net).

Ever find yourself wanting to impress your fellow Rotarians with an interesting tidbit or three about yourself? Well, **Choppering with a Rotarian** is for you! This is a President Sally & Rotarian Scott collaboration, **Choppering with a Rotarian** is a creative way for Rotarians to get to know each other through the unveiling of unknown tidbits about Club members. How does it work? Each week, a Rotarian will be identified through a highly advanced randomization selection process. Rotarian Scott will then notify the selected Rotarian and together, they will place three unknown facts on a PowerPoint to be presented during the next meeting of the Pensacola Rotary Club. On the off chance that we do not have a **Choppering with a Rotarian**, President Sally & Rotarian Scott will serenade the audience with a medley of Donnie & Marie Osmond's greatest hits. So let the guessing begin!

## 2020-2021 Club Officers

•President	Sally Fox
•Past President	John Trawick
•President Elect	Ed Wonders
•Secretary	Lisa York
•Treasurer	C. Ray Jones
•Sergeant At Arms	Scott Grissett
•Historian	John Appleyard

## Bulletin Information

Joe Vinson email: [joe@akabaka.com](mailto:joe@akabaka.com)  
Web Site: [Pensacolarotaryclub.org](http://Pensacolarotaryclub.org)  
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Chris Bridwell, Executive Secretary  
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## Clubs Available for Makeup

Five Flags	McQuire's Irish Pub	Mon.	12:15 pm
Gulf Breeze	Legends at Andrews Institute	Tues.	7:00 am
Milton	The Hangar Restaurant	Tues.	12:00 pm
Seville	Seville Quarter	Tues.	4:15 pm
Cantonment	St. Luke's United Methodist Church	Wed.	12:15 pm
Perdido	The Point Church	Wed.	7:30 am
Pace	Stonebrook Village Country Club	Thur.	7:00 am
Cordova	Gulf Coast Kid's House	Thur.	7:00 am
Suburban West	Pensacola Yacht Club	Thur.	12:00 pm
Navarre	Broussard's Cajun Restaurant	Fri.	12:00 pm
Pensacola North	Asbury Place, Cokesbury United Methodist Church	Fri.	12:00 pm

## District Governor

Jan Pooley  
<http://www.rotary6940.org>

## Assistant District Governor

Daniel J. Sulger

# HAPPY BIRTHDAY

Birthdays for the week of  
June 8th through June 14th

**John Trawick** – June 11 – born in Atlanta, GA, in Rotary 23 years,  
Paul Harris Fellow

**Jerry Kindle** – June 14 – born in Gainesville, FL, in Rotary 11 years,  
Paul Harris Fellow

## Prayer/Pledge And Sunshine

### June 8

Prayer/Pledge: John Tice                      Sunshine: Alexis Bolin

### June 15

Prayer/Pledge: Bruce Partington              Sunshine: Scott Grissett

## Greeters and Ticket Sales

### June 8

Greeters: Charlie Sherrill and Bob Perkins  
Ticket Sales: Tony Neuner and Clark Merritt

## Program Schedule

### June

- 8 - Judy Bense & Margo Stringfield, Celebrating Florida's 200th years Territorial Anniversary
- 15 - Sherry Hartnett & Bert Thornton, High Impact Mentoring, A Practical Guide to Creating Value in Others
- 29 - President Sally, Rotary Year in Review

## What's Happening in Rotary

### June

- 8 - Noon Regular Weekly Meeting @ Pensacola Yacht Club and On-Line Zoom Meeting  
1:00 Board of Directors Meeting
- 15- Noon Regular Weekly Meeting @ Pensacola Yacht Club and On-Line Zoom Meeting
- 22 - Regular Weekly Meeting Cancelled
- 24 - Change of Command Banquet 5:45 On Board Pensacola Bay Ferry
- 29 - Noon Regular Weekly Meeting @ Pensacola Yacht Club and On-Line Zoom Meeting

### Lisa York, Attorney at Law

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