Planning Ahead: For Aging and the Contingencies
Our Grateful Family Journey with McLean

My father and I loved the outdoors and spent many hours playing tennis and golf together. At age 85, Dad turned in his golf clubs and tennis racket. But that didn't stop him from exercising. Regular walks became his favorite, and he planned his day around outdoor activities. He maintained his physical activity until the last two weeks of his life.

But outdoor activities were only part of Dad's plan. In fact, planning is a Garratt family trait – that's just how we operate. We love to plan anything and everything, and Dad took strategic planning to a whole new level. We'd have Plan A, B, C and contingencies going on simultaneously. We explored every “what if” scenario in order to be prepared.

When Dad traveled, his itinerary included his route, stop overs and a long list of who to call should there be a plumbing, electric, car, homeowner’s, mail, banking... etc... issue. He even kept a file on the clothes and equipment he packed for each trip!

That's why I knew the aging process was going to be challenging – for me and for my dignified, private, independent and gentleman father. There is nothing simple about the aging journey.

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One Man – One Vision and the Community to Carry It Forward
Preserving 400 Acres of Remote, Open Space

Thomas Caruso was an unlikely philanthropist - a simple man who chose a simple lifestyle. Yet his vision for land preservation was expansive and enduring.

A machinist at Pratt & Whitney, Mr. Caruso lived in a one-room apartment in Hartford’s South End. Unmarried with no children and few family members, his social circle appeared equally modest.

However, Caruso enjoyed a serious passion: he loved to watch the stocks. Opening an account at Hartford National Bank and Trust (now Bank of America), he would first deposit his modest savings and next order stock trades. Remarkably successful in his trades and with little regard for his accumulating wealth, he amassed significant wealth over time.

However, his lucrative hobby led to a dilemma – what should be done with his wealth upon his death? Working with his attorney, Wilson Keithline, Caruso instructed: “Just buy a high, remote piece of land and leave it alone.” Shortly thereafter, Thomas Caruso died at age 72.

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Your Annual Charitable Support provides innumerable benefits for individuals, patients, families and caregivers in meaningful ways:

- Areas of Greatest Need: 26%
- Home Health and Hospice Care: 22%
- McLean Game Refuge: 10%
- Skilled Nursing and Resident Life: 9%
- Endowment Income: 5%
- Meals on Wheels: 5%
- Technology and Media Services for Resident Life: 3%
- Memory Care, Memory Care Volunteer Program and Adult Day Services: 2%
- Post-Acute and Out-Patient Rehab and Recovery: 1%
- Employee Education: 1%
- Outdoor Enhancement & Independent Living: 1%

McLean is grateful to all volunteers – nearly 500 strong!

Volunteer leadership is recognized below:

**McLean Trustees**
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**McLean Auxiliary Board**
Lorraine Daigle (President), Marge Brown, Lucian Cascio, Angela Cleveland, Judy Fitzgerald, Pat Gallagher, Judy Goff, Dot Horton, Helen Molstad, Connie Norstrom, Rita Rozantes, Jane Stevenson

Dietary team members gather together behind the newly-installed, beautiful and efficient server in the Pfirman Dining Room gifted by the McLean Auxiliary. Every year the McLean Auxiliary grants more than $20,000 from Auxiliary Gift Shop proceeds to enhance quality of life for residents and patients.

**Endowed Funds and Trusts**
- Jean Berg Fund for Reminiscing
- Raymond & Eleanor Bradley Fund for Outdoor Enhancement
- Faith Collins Trust
- Helen Cichon Trust
- Maureen M. Ellis Scholarship Fund for Nursing Education
- Charles R. & Margaret H. Lindberg Fund
- Sorenson Media Center Fund
- David Thornton Fund for Home Care
- Raymond & Eleanor Bradley Fund

**Temporarily-Restricted Funds**
- Roy Family Fund for Education
- The John C. Heminway Fund for Education
Senator McLean cared deeply about the health and vitality of our community – for people and for the protection of wildlife. His was a grand and encompassing vision that continues to thrive thanks to McLean’s donor community.

There are so many ways to enhance life with a legacy gift to McLean. Tell us what really matters to you and we will work together to create your lasting legacy. Every gift is significant because even a modest bequest will grow substantially over time.

To begin a conversation today, call Deene Morris, MA, CFRE or Vickie Dirienzo, MPA, CFRE, McLean Development 860.658.3702

We gratefully acknowledge the generosity and compassionate foresight of our Legacy Members:

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Painting by Martha Fortmann, McLean Village Resident
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Our Grateful Family Journey with McLean continued

Even though I have a nursing background, I knew I needed to be better prepared for my father's final journey. He was a McLean Village resident and his healthcare needs were provided for; however, I was his primary family caregiver.

From the complexities of a Living Will to care in the hospital and rapid change of health, I relied on the entire McLean community to guide me through the process.

At McLean, I attend educational programs and also trained as a Hospice Volunteer. I felt totally comfortable reaching out to the entire McLean staff. As a result, I was prepared and provided my father with the dignity he so deserved.

Dad was a WWII veteran and a private man. All my life I knew he “had my back” and when the tides turned, he knew he could count on me.

Not a day has passed since his death when I haven’t thought of him. My experience with McLean enabled me to be prepared and act in Dad’s best interest.

However, the land was owned by members of the Collamore and Carpenter families. Working closely together, Mr. Brown facilitated an agreement that provided substantial charitable deductions in return for a reduced selling price of the land.

Equally grateful was the Bank of America because they felt this land tract most closely aligned with Caruso’s vision of remote, open space. In the end, the beautiful, untouched property would be known as the Caruso-Collamore-Carpenter Preserve.

But the story continues.

Remember that Mr. Caruso gave two instructions to Attorney Keithline. First, buy the land. Second, leave it alone! The latter imperative did not counsel neglect. Rather, it implied watchful stewardship.

In its remote location were the land to be ignored, it would readily risk becoming a refuse dump, or a carve out for unauthorized trails or otherwise treated with disrespect. Preventing abuses of this sort was essential if Mr. Caruso’s vision was to be realized.

And so, having facilitated the land acquisition some years ago, the Bank of America recently provided an endowment gift with the remaining funds in Mr. Caruso’s Trust. Today, McLean honors Mr. Caruso’s vision with The Thomas Caruso Stewardship Endowment to assure the perpetual stewardship of what everyone now knows as “Caruso’s Mountain.”