

2014 Donor Report

McLean

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



Steve Garratt, and his daughter, Ginny, at Simsbury Farms Golf course late autumn 2012.

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.

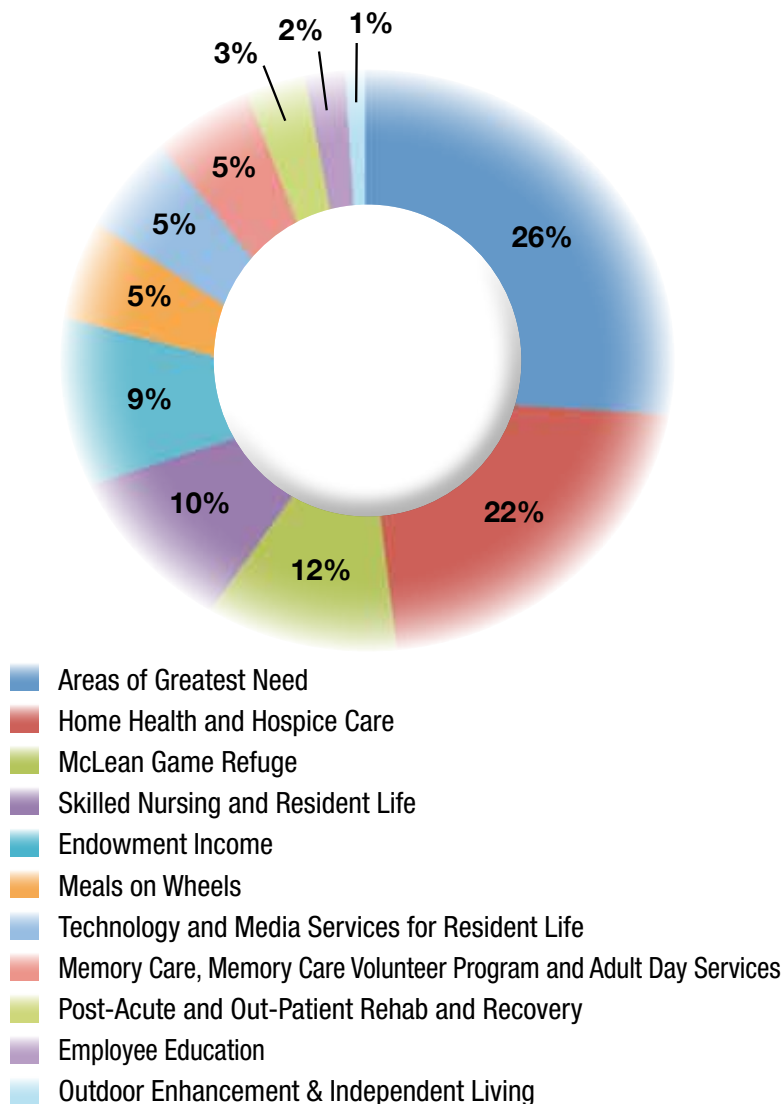
However, his lucrative hobby led to a dilemma – what should be done with his wealth upon his death? Working with his attorney, Wilson Keithline, Caruso instructed: *"Just buy a high, remote piece of land and leave it alone."* Shortly thereafter, Thomas Caruso died at age 72.

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Caruso Falls in the McLean Game Refuge

Your Annual Charitable Support

provides innumerable benefits for individuals, patients, families and caregivers in meaningful ways:



McLean is grateful to all volunteers – nearly 500 strong!

Volunteer leadership is recognized below:

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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.

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Senator McLean Legacy Society



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*

One Man – One Vision and the Community to Carry It Forward

Preserving 400 Acres of Remote, Open Space continued

Caruso had not mentioned any specific institution to receive his bequest gift. Nor did he specify the type of land or where it might be located. As a result, numerous organizations were asked to present their land preservation goals.

Granby resident Daniel P. Brown, Jr. (Put), then Chair of McLean Trustees and Chair of the McLean Game Refuge, met with Attorney Keithline and described a magnificent parcel of land in West Granby.

Connecting the dreams of the donor with the needs of the community is the mission and purpose of philanthropy. A hard working man who valued efficiency, Mr. Caruso would be pleased, indeed, to know of the collaborative efforts in his honor and the productive outcome to serve generations to come.

Known as Broad Hill, the parcel spanned nearly 400 acres in size and connected to three land preserves: Enders State Forest, the Granby Land Trust and Holcomb Farm.

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."

Planning Ahead: For Aging and the Contingencies

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.

The McLean Golf Tournament



McLean will have its 25th Golf Tournament in 2015. Over the past 24 years more than \$1.5 million has been raised by this charitable event!

Thank you!

**25th Anniversary: Save the Date!
Monday, September 14, 2015**

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