



# The Joshua Tree

September 12, 2023

## THE BEST AND WORST JOBS IN THE WORLD

This week the Club welcomed **David Greiner** from the Greiner Law Group to share information about Trusts and how they can help and hinder your loved ones. Trusts are powerful legal instruments that enable individuals to manage and protect their assets, provide for their loved ones, and achieve various financial and estate planning goals. David simplified it by stating that a Trust is like giving someone an item of yours to hold, and in case you pass away, then they have to then give it to someone else. At their core, trusts involve three key roles: the trustor (also known as the grantor or settlor), the trustee, and the beneficiary. Understanding how these roles interact is crucial when establishing and managing a trust.

The trustor is the person who creates the trust and contributes assets to it. These assets can include cash, real estate, investments, or other valuable property. The trustor defines the terms and conditions of the trust in a legal document known as the trust agreement or deed. This document outlines how the trust will operate, who the beneficiaries are, and the trustee's responsibilities. The trustor's primary responsibility is to ensure that the trust's objectives align with their intentions and to provide clear instructions for the trustee to follow.



David called the Trustee the worst job in the world, because the trustee gets to hold the property but gets nothing from holding it. The individual or entity responsible for managing and administering the trust on behalf of the beneficiary. This role carries significant legal and fiduciary responsibilities. Trustees must act in the best interests of the beneficiaries, following the instructions set out in the trust agreement. Their duties typically include investing trust assets, distributing income or principal

as specified, and ensuring compliance with relevant laws and regulations. Trustees must exercise prudence, diligence, and impartiality in carrying out their responsibilities. Depending on the trust's complexity, a trustee may also need to file tax returns and keep accurate records of all transactions.

Beneficiaries are the individuals or entities for whom the trust was created. They can be family members, friends, charitable organizations, or even the trustor themselves. Beneficiaries have a vested interest in the trust and are entitled to receive the benefits specified in the trust agreement. These benefits can include income generated by trust assets, periodic distributions, or the transfer of trust assets at a specified time or event. Beneficiaries can also have a say in trust matters if the trust agreement allows for their involvement or input.

In summary, trusts are a flexible tool for managing assets and achieving various financial and estate planning goals. The trustor defines the trust's purpose, the trustee manages the trust assets, and the beneficiaries reap the benefits. Effective communication among these parties and a clear, well-drafted trust agreement are essential for ensuring that a trust functions as intended, providing peace of mind for all involved.

### This Week's Functionaries

- Invocation:** Chris Ackerman
- Flag Salute:** David North
- 4-Way Test:** Arsalee Morales
- Fine Master:** David North

## Rotarian of the Month



### MURRAY'S MINUTE

Thank you to David Greiner for stopping by and sharing a ton of information about Trusts. I believe you

shared something that everyone can use in their business and personal lives. We hope to have you back soon.



We are still building our raffle basket. We now have six items, but we need more to make it worthy of a raffle that we can raise funds in the amount of \$1000 or more for the Club. Please bring cash, gift cards, alcohol items or something else of real value that a winner could use.

We will have our next Fireside on Wednesday, October 4th at the home of Stew and Diane Anderson. Please sign up to attend.

Our Teacher Mini Grants are coming up and we are once again looking for members to fund at least one Grant for a local teacher. Last year we raised \$13,000 for Grants, this year our goal is \$15,000!

We need volunteers for this Sunday's Beer Pour, as a way to help raise funds for the Club. Please contact Arsalee Morales to volunteer!

See you next week!

*Steve*



**David North** was presented as the August Rotarian of the Month at this week's luncheon from President **Steve Murray**. David was awarded his pin for his tireless work behind the scenes as Treasurer of the Board. David was also presented with a commemorative Rotary pen and his Treasurer Pin. Congratulations David!

## Spoon of Exemption

**Mike Johnson** had another week with the Spoon and shared that Flagstar Bank has a new logo! Desert Community Bank will cease in February 2024, and officially become Flagstar Bank.

Flagstar Bank is still offering \$250 to open a new checking account with the bank. Please contact Mike for terms and conditions.



**CREATE HOPE  
in the WORLD**



# CREATE HOPE in the WORLD

## Big Blue Dice

## Raffle



*Jim Murray had his ticket drawn, but sent his wife up instead. Lesley Murray had the chance to grab the Blue Dice, but picked a white one and saved the chance for another Rotarian. The pot continues to grow next week with 4 Dice and \$450 for the lucky Rotarian who can grab the Blue Dice.*

During this week's raffle, **Robert Lovingood** was the big winner! Robert left the meeting with a specialty mirror from **Jim Murray**, a bottle of wine from **Steve Murray** and a Victor Valley Transit USB Drive, as did **Bob Basen**, from **Chris Ackerman**. Robert gave away some ICR goodie bags with gift cards that will be used by **Lesley Murray** and **Dr. Ron Boyd**.

**Rob Kilpatrick** as also a big winner winning a bottle of wine from **David North** and a Christmas holiday bag from **Bill Edwards**. **Bo Goulet** also won a bag from Bill.

Finally, **Jim Murray** donated a sleeve of golf balls that will be used (maybe) by **Donna Wells**.

## Fine Session



**David North** was our Fine Master this week and during the meeting noticed **Bill Edwards** texting with **Mike Page**. After quite a long back and forth of texting, Mike wrote, "Who is This?" Due to Mike waiting that long to ask, he received a fine of \$60. Mike tried to

plead his case that he recently lost 1/3 of his contacts due to a phone crash, so David gave him a 1/3 fine of \$20.

The only other penalty levied was to **Brad Poiriez** for the amount of \$20, because the air quality over the weekend gave David allergies.

## Rotary Guests

Joining our speaker this week was **Coleen Luque**, as well as **David Poulson** from the Victor Valley Wastewater Reclamation Authority. Joining **Jim Murray** this week was wife **Lesley Murray**.

# Rotary



## Club of Victorville, CA

### Proposed Member

*If you protest the admission of this member please respond in writing by 5 p.m. September 18 to President Steve Murray.*

**Darron Poulson**

**Victor Valley Wastewater Reclamation Authority  
General Manager**

**Classification: Services: Water Reclamation**

**Sponsor: Steve Murray**

## The Polio Pig

**Collected this week: \$16.00**

*Polio Pig: \$11 • Dice (Jim Murray) \$5 = \$16.00*

**Collected to Date: \$19,951.52**

**Total equals: 100,887 Doses!**

**One dollar equals 2 Doses of Vaccine!  
\$500 pays for a Polio Clinic!**





**VICTORVILLE ROTARY CLUB OFFICERS**

**Board of Directors**

- President 2023-2024 .....Steve Murray
- President 2024-2025 .....Bryan Gillespie
- President 2025-2027 ..... Bill Edwards
- President 2027 - 2028 ..... **Please be Interviewed**
- Immediate Past President/Special Projects..... Arsalee Morales
- Treasurer/Scholarships ..... David North
- Executive Secretary/Foundation/Grants ..... Margaret Cooker
- Club Service/Membership .....Bryan Gillespie
- Community Service/Speech Contests ..... Mike Johnson
- International Service..... Ben Tafoya
- Youth Service/RYLEA & TLC/Ethics Essay..... Ron Boyd
- Vocational Service ..... Bill Edwards

**Members-at-Large:** Rob Kilpatrick & Bob Basen

**Positions & Committee Chairs**

- BOD Secretary ..... Pam Murray
- Billing Officer .....Esther Mears
- Dan Stover Music Contest..... Dawn Quigg
- Flowers and Gifts ..... Linda Hove
- Foundation & Grants ..... Margaret Cooker
- Fundraising..... Arsalee Morales
- Joshua Tree Editor ..... Chris Ackerman
- Membership.....Steve Murray
- Programs ..... Mike Page
- Publicity/Public Relations ..... Rob Kilpatrick
- Public Safety..... Rick Bessinger, Teresa DeAtley,  
and John Wickum
- Sergeant At Arms.....Steve Murray
- Scholarships..... David North
- S.T.A.R. Students .....Maureen Mills and Michal Krause

**The Victorville Rotary Club meets every Tuesday for fellowship  
at 11:30 a.m. and meeting at 12:00 noon at the Bear Valley  
Country Club, 13229 Spring Valley Parkway, Victorville**

**Make-up Days and Locations**

- MONDAY:** San Bernardino East, Imperial Palace, noon
- TUESDAY:** Rancho Cucamonga Sunrise, 7:15 a.m.  
Empire Lakes Golf Course  
Rancho Cucamonga, 12:00 p.m., Etiwanda Gardens
- WEDNESDAY:** High Desert/Hesperia Club meets 7:00 a.m.,  
Mile High Cafe, 8832 Orange St., Hesperia  
San Bernardino Crossroads, Hilton, noon,  
Barstow, DiNapoli's Firehouse, 1358 E Main St,  
Barstow, CA
- THURSDAY:** Apple Valley, Thursday various meeting locations  
and times. Ontario, 12:15 p.m., Doubletree Hotel  
San Bernardino, Denny's at I-15, 7 a.m.  
Redlands, Masonic Temple, noon
- FRIDAY:** San Bernardino North, Elks Lodge, 12:05 p.m.

**Calendar Dates**

- Sept 17: Beer Pour Fundraiser**  
Mexican Independence Celebration  
Hesperia Lake Park • Time: 1:30pm -  
9:30pm
- Oct 9: Board of Directors Meeting**  
5:00pm -Fellowship  
5:30 pm Board Meeting  
Location: TBA

**Rotary**  
Club of Victorville, CA



**Upcoming Programs**

- Sept 19:** Former Assemblyman Thurston  
"Smitty" Smith **TOPIC: My Years in  
the Assembly - A Look Behind the  
Curtain** (Page)
- Sept 26: San Bernardino County Sheriff  
Shannon Dicus** (Wickum)
- Oct 3:** John Kozyra, St. Mary Executive  
Director Operations **TOPIC: Sexual  
Assault in the High Desert - Why is  
it Underreported and What Can be  
Done to Assist the Victims** (Page)
- Oct 10: OPEN**

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