A Perfect Fit

Gina Fish loves people – it’s obvious when you meet her. As the new board chair for the Alley’s planned giving program, Gina is committed to helping the Alley generate greater awareness of this type of giving. “I really enjoy launching things to see how they grow. It’s almost like watching a child grow,” Gina says. “I love to be a part of the genesis of a project, a committee or an event for organizations that I believe in. It’s an adrenaline rush for me. I initiated an annual fund at a very established school in Houston and watched it grow for five years. To oversee the growth of that project was one of my proudest moments in fundraising.”

Gina is familiar with high adrenaline situations. She started her career as a cardiovascular nurse and later an ER nurse. After graduating from The University of Texas Health Science Center at Houston, she worked at the Texas Heart Institute with legendary heart surgeons Denton Cooley and O.H. “Bud” Frazier. She had the privilege of scrubbing in with Dr. Cooley and meeting Dr. Christiana Barnard and Dr. Robert Jarvik, designer of the Jarvik-7 artificial heart. Her patients included dignitaries and heads of state. Though it was an exciting and momentous time to be in the operating room, she preferred to work in Dr. Cooley’s ICU because it provided more contact with the hospital staff and patients. “I’m really social – I need to interact with people, and in the operating room you really don’t meet that many people.” And as it turned out, it was a propitious choice – she met her future husband, Dr. Richard Fish, in the ICU.

(continued on next page)
A Perfect Fit (continued from page 1)

Following Richard’s career path, they moved to Birmingham for his three-year ophthalmology residency and on to San Francisco for his fellowship. In 1992, after their first child was born, Gina and Richard moved back to Houston to be with family. Richard joined Retina Consultants of Houston where he is now the senior partner. Four years later, they welcomed their second child.

Gina admits she was not always a theatre person. It was her children who introduced her. When her son and daughter were cast in their school’s musical productions, “I drove them to and from rehearsal, and in the process I acquired a new appreciation of theatre.” Her interest in the arts grew to the point that she switched from fundraising for her children’s schools to fundraising for the performing arts. She joined the boards of Masquerade Theatre and The Methodist Center for Performing Arts Medicine.

Because she did not grow up in Houston, Gina wasn’t that familiar with the Alley. Eventually she met Jerry Finger, a long-time member of the Alley Board. He was so impressed with her energy level and people skills that he asked her to join the Alley Theatre’s Advisory Board. She went to see Wonderland and hasn’t missed a production since. A year later, in 2011, she was elected to the Alley’s Board of Directors.

“I discovered that I love theatre! I’ve learned so much these past two and a half years. I have several favorites, but a standout production for me, of course, was Ether Dome last fall.”

Gina and Richard make it a rule to review their estate plan at least every five years. When their attorney asked them if there were any charities they would like to benefit, Gina immediately thought of the Alley because of the impact it’s had on her life and the accountability of the organization. “I believe in the product – the Alley is extremely well run. There is transparency and professionalism which are very important to me when choosing to serve on a board. This place is magical.”

As board chair, Gina hopes that others will realize that planned giving is not just for the elderly and that it doesn’t have to be complicated or affect your current income. Her new role at the Alley gives her the opportunity to do what she loves best – interact with people. So next time you see Gina at a performance, don’t hesitate to say hello. You’ll be drawn to her too.
Quick Quiz on Wills

Here’s a short test of your will planning knowledge. Circle the correct answer, and then compare with the answers below.

1. To find an attorney to draft your will, seek recommendations from:
   A. friends and relatives
   B. the local bar association
   C. both A and B

2. People who die without wills risk having their estates distributed:
   A. to people who are unrelated to them
   B. according to state “intestacy” laws
   C. to the federal government

3. Federal estate taxes:
   A. apply to estates over $5.12 million in 2012
   B. may affect estates over $1 million in 2013
   C. both A and B

4. In calculating the value of your estate for estate tax purposes, the government includes the following:
   A. everything you own, including the face value of your life insurance policies
   B. everything you own, excluding the face value of your life insurance policies
   C. everything you own, excluding life insurance policies and collectibles such as heirlooms and coin collections

5. You should review your will:
   A. every 10 years
   B. each time your car has an oil change
   C. once a year

6. You can add a new beneficiary to your will by:
   A. informing your executor of the change
   B. executing a codicil
   C. both A and B

7. You may need to revise your will if:
   A. your attorney retires
   B. you receive a large inheritance
   C. state intestacy laws change

8. Your will can provide heirs with good money management if it:
   A. offers sound investment advice
   B. includes a trust
   C. names a guardian

9. The following can serve as executor (personal representative) of your will:
   A. a friend or family member
   B. a bank trust department
   C. both A and B

10. You can provide bequests for the Alley Theatre:
    A. under state intestacy laws
    B. through a will or codicil (amendment)
    C. by telling your executor to make a gift

Bonus:

11. Which English playwright left his wife “his second best bed with the furniture” in his will?
    A. Christopher Marlowe
    B. William Shakespeare
    C. Ben Jonson

Answers: 1 C, 2 B, 3 C, 4 A, 5 C, 6 B, 7 B, 8 B, 9 C, 10 B, 11 B
Planning an Effective Will

Many individuals accumulate assets over a lifetime but then spend little or no time considering how they want those assets to be distributed after their deaths. With a will, you can:

- Direct the distribution of your assets to those you care about most;
- Choose a personal representative (executor) to oversee the distribution;
- Provide for family members and friends according to their needs;
- Provide appropriately for minor children by naming a guardian or establishing a trust;
- Gain an opportunity to possibly save taxes by utilizing proper planning techniques; and
- Provide for charitable causes, such as the Alley Theatre, that have special meaning to you.

In the absence of a will, the state will distribute your property as directed by certain inflexible and impersonal state laws – in ways that might not be in alignment with your wishes.

To help in the planning process, the Alley Theatre is offering a free publication – *Techniques for Planning a Successful Will*. This publication is an overall guide that includes a checklist of information needed in preparation for the first meeting with your attorney. Also included is a “Rate Your Estate Plan” to score and rate yourself on the plans that you have already made, such as a will, a living will and life insurance needs.

To obtain a FREE copy of *Techniques for Planning a Successful Will*, simply return the enclosed card in the envelope provided or call our office. We'll also be happy to provide you with more information on gift planning. There is, of course, no obligation.

Where Are the Bonds?

If you’re thinking of giving U.S. savings bonds as birthday or wedding gifts this year, don’t bother going to the bank. Since the beginning of the year, bonds are available only online at treasurydirect.gov. The goal in eliminating paper is to save $70 million over five years, according to the Department of the Treasury.

Whether buying bonds as a gift or as an investment, purchasers will have to set up a free account. One major advantage is the ability to manage and redeem bonds electronically, without having to worry about lost paper bonds. If you’re purchasing bonds as a gift, you can choose special “gift certificates” for a variety of occasions on the website.

The Treasury Department also reports that billions of dollars in bonds have stopped earning interest. If you hold paper savings bonds, you can check the website to see if yours fall in that category. If so, it’s a smart idea to cash the bonds and reinvest the proceeds. An even more attractive option is to use the funds to make a gift to the Alley Theatre. The charitable deduction may offset all or most of the tax due on the bonds.

If you would like to make a bequest for the future of the Alley Theatre, our legal name is Alley Theatre and our Tax ID number is 74-1143076.