

# THE LEGACY OF EXCELLENCE

**ELECTRI  INTERNATIONAL**  
THE FOUNDATION FOR ELECTRICAL CONSTRUCTION, INC.



Dear Friends,

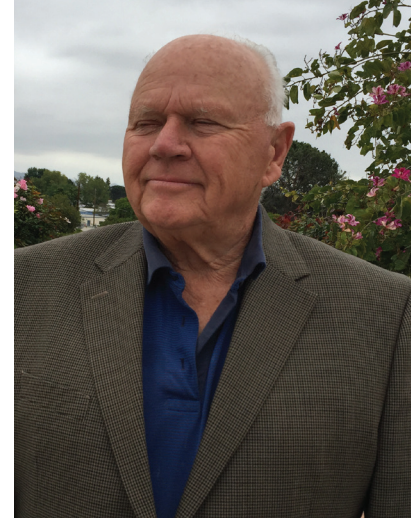
With absolute certainty, I can tell you that I love and respect the electrical construction industry. There is great satisfaction and a sense of pride in identifying, winning, and completing the best projects available with the best workforce my team can assemble.

With my NECA colleagues and our San Diego Chapter, I have had opportunities I never could have imagined in my early years in this business. When NECA first launched its Electrical Contracting Foundation in 1989, I knew instinctively this was going to be very special and very important for contractors. I was proud to be part of its launch and, today, I am proud to be part of ELECTRI International's ongoing success.

Every year, contributions from electrical contractors, NECA Chapters, and industry allies worldwide support ELECTRI International's agenda. ELECTRI has progressed from modest beginnings to take its place among the nation's most highly-respected research and educational foundations.

As you and I mature and become more seasoned, we all want to see the good things in our lives continue and prosper – long after our personal involvement ends. That's where "Legacy" comes in. We want to leave a legacy for our families and for the organizations in which we have invested ourselves.

At the start of the 21st century, Darlene and I considered how we might best assist the Foundation for decades to come. We made the family decision to include ELECTRI International in our personal estate plan. Since first launching the Legacy of Excellence campaign, ELECTRI has been very fortunate to receive several major legacy gifts to advance its research and education agenda.



Whatever your life-stage in terms of retirement and estate planning, we hope to encourage you to consider making a planned gift to ELECTRI International. There are many ways to make a planned gift. With every option, your investment will help ELECTRI continue to serve our EC industry. At the same time, your legacy estate gift will secure substantial tax benefits for you and your family.

By including ELECTRI in your long-term plans, you help ensure the Foundation has the resources to continue mentoring future generations of leaders and problem solvers. Your investment in ELECTRI International's future will impact bright, bold thinkers and create opportunities that will prepare the leaders of tomorrow to succeed.

***That is truly a worthwhile legacy.***

**Richard McBride**

Honorary Chairman  
Legacy of Excellence Initiative

# LEGACY GIFT OPPORTUNITIES

Making a **Legacy of Excellence** commitment to ELECTRI International can be an important part of your overall retirement and estate strategy. Planned gifts are very flexible and can be designed to meet your needs and expectations.

## Remember ELECTRI in Your Estate Plan

A **Bequest** in your Will designates that a certain portion of your assets will be given to ELECTRI International. A Bequest can represent a considerable estate tax savings for your heirs.

- **A Set Amount Bequest.**

You transfer dollars, or shares of stock, or a parcel of real property to ELECTRI. You detail the exact amount of the gift.

- **A Residual Bequest.**

You give ELECTRI International “an amount equal to \_\_\_ percent of the net value” of your estate.

- A cash **Legacy Gift** of \$100,000 can be pledged and paid over 20 years. Your gift is established now and your company agrees to continue to make remaining pledge payments even after your retirement or death. Your company successor (once named) can join you in ELECTRI activities every year, ensuring that your company’s interest in and involvement with the Foundation are secure.

One of ELECTRI’s earliest and strongest advocates, Bob Pfeil, always told us he wanted to do something to help keep the Foundation strong. Bob’s generous Legacy of Excellence investment of \$250,000 is truly having an impact on our Talent Initiative as we move forward.

**Robert J Bruce**  
Bruce and Merrilees  
Electric Company  
New Castle, Pennsylvania





## Giving Real Property Has Real Benefits

Contributing **Appreciated Securities** you have held for at least a year will completely avoid capital gains taxes. Your charitable deduction is set at the full fair-market value of the gift.

A gift of **Real Estate** offers several considerable tax-saving benefits. You may claim the full fair-market value as an immediate tax deduction (up to the annual limitation) and avoid capital gains on the sale of your residential, commercial or rental property.

With a **Life Estate Interest** gift, you contribute your primary residence, farm, or even a second home to ELECTRI International. You keep the right to live in and use the property until death. On the date the planned gift is made, you receive an immediate tax deduction for a portion of the appreciated value of the property.

Giving ELECTRI International a fully-paid-up existing **Life Insurance** policy you no longer need gives you a tax deduction based on the current value of the policy. Or, you could set up a new insurance policy, naming ELECTRI International as owner and beneficiary. You then make an annual tax-deductible contribution to the Foundation which ELECTRI uses explicitly to pay the new policy's premium.



I grew up around the electrical construction industry, starting with my grandparents. Their decision to give back to the industry by making a major Legacy commitment to ELECTRI is important to me. It makes me want to honor their heritage even more and do everything I can to keep our profession strong.

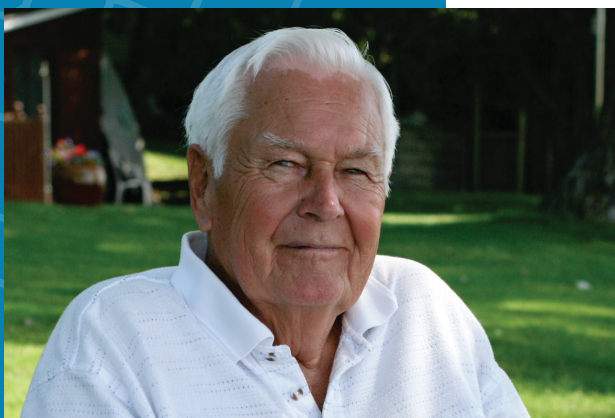
**Sonja Rheume**  
Christenson Electric, Inc.  
Portland, Oregon





ELECTRI gives me a way to give back to an industry that has been very good to me, my family, and my company. ELECTRI contributors live and breathe to make our industry better for all of us.

**Rex Ferry**  
VEC Inc.  
Girard, Ohio



Our industry's past was exciting. Its position today is challenging. Our future is electrifying.

**Leo Weber**  
Past President NECA  
at the launch of the  
Foundation, 1990

## A Gift to ELECTRI International PLUS Income for You

A **Charitable Remainder Annuity Trust** is a contract that guarantees you a fixed income for life in exchange for your gift. As the Trust asset grows, you can be satisfied that you have secured the set dollar amount of income you will receive each year and that ELECTRI International will have an even larger legacy once the Trust payout is completed.

Through a **Charitable Remainder Unitrust**, the income paid to you or to your named beneficiary is based upon the value of the Trust each year rather than a fixed dollar amount. A Unitrust also provides protection against inflation. By selecting a lower annual rate of return, the asset's principal grows more quickly, thereby increasing your payout in subsequent years.

A **Charitable Lead Trust** is especially useful when you have an income-producing asset you want to preserve and protect for your heirs but do not need that income to maintain your current lifestyle. The Lead Trust pays annual income to ELECTRI International for a set number of years. When the Trust ends, the asset reverts to you or to your beneficiaries. One benefit, especially for larger estates, is that estate taxes on assets transferred to named beneficiaries are fixed at the time the Trust is created. If the Trust grows, your heirs benefit from the increase in value - without additional estate tax on the growth portion of their inheritance.

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Whether you have other planned gifts in place or are just becoming familiar with the options available, it is essential that you consult both your attorney and financial advisor to ensure the choices you make are right for you.

When writing your Will and naming your beneficiaries, you always retain your right to remember family, cherished friends, and favorite charitable organizations such as ELECTRI International.

*ELECTRI International – The Foundation for Electrical Construction, Inc. is designated by the Internal Revenue Service as a 501(c)(3) non-profit charitable organization to which tax deductible contributions may be made, as provided by law.*



## Consider the Future of ELECTRI International

Your investment in the **Legacy of Excellence** will help ensure that ELECTRI International can help keep electrical construction strong, productive, and profitable.

### *ELECTRI's goals are to:*

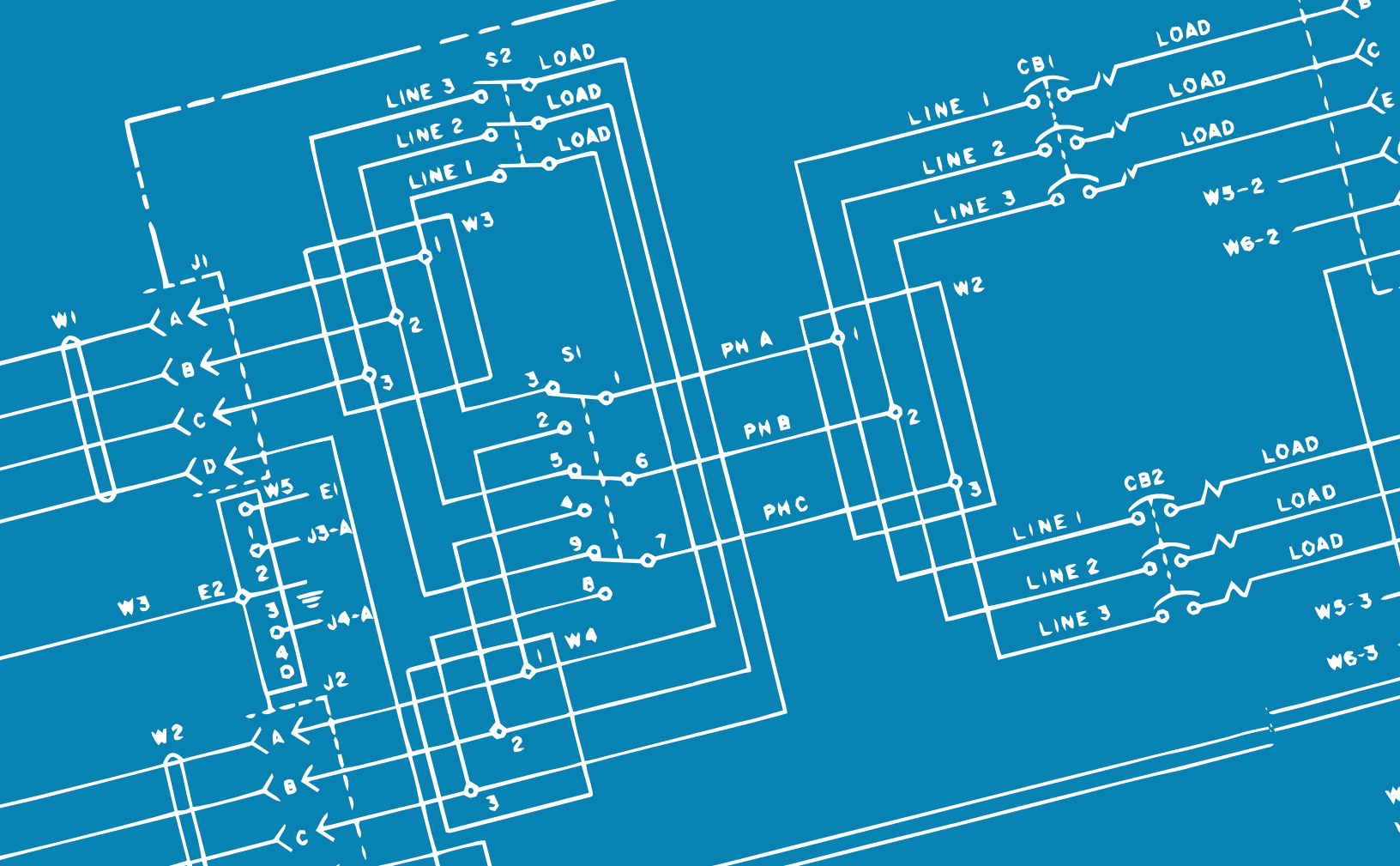
- Be recognized internationally as the most outstanding independent advocate for and provider of critical research, top quality education, technology solutions, and international outreach for the electrical construction industry.
- Make use of the collective intellect and philanthropic spirit of industry leaders to provide unbiased, cutting-edge information for the electrical construction industry.
- Maintain its leadership position as the standard-setter in developing, disseminating, and implementing educational programs and research products that are innovative, state-of-the-art and integral to the success of electrical construction worldwide.
- Continue to develop collaborative partnerships with the most talented researchers and investigators from the highest quality academic institutions and research organizations.
- Offer industry-related activities and initiatives designed to encourage students to consider careers in electrical construction.
- Foster and promote a positive and dynamic image of the electrical contracting industry among leaders in business, education, and government.



This Foundation's activity and impact tell a unique, some might say remarkable, success story in the trade world. As ELECTRI International continues to mature, our greatest challenge will be to continue to commission and produce products of high impact and maximum value for our industry. My wife, Margaret, and I are dedicated to continuing this first-class operation for the benefit of our industry.

**Albert G Wendt, d.**  
Cannon & Wendt  
Electric Company  
Phoenix, Arizona





*The mandate of ELECTRI International is to promote and advance the ability of electrical contractors to meet the demands of today and the challenges of the future. The Foundation funds research and educational programs critical for the industry.*

*We welcome your inquiry.*

**ELECTRI  INTERNATIONAL**  
THE FOUNDATION FOR ELECTRICAL CONSTRUCTION INC.

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