

## ROTARY OFFICERS - 2016-2017

John Germ	International President
Nick Frankle	District 5240 Governor

## Rotary Club of Paso Robles - Officers and Directors - 2016-2017

Tony Wallace	Tonyrprt@gmail.com	President
Fred Roy	Fkroy1@gmail.com	Past President
Pat Sayne	Pjsayne@hotmail.com	President Elect 2017-2018
Jessica Fullerton	Jessicafullerton60@gmail.com	Secretary
Ann Cochrane	acochrane@heritageoakbank.com	Treasurer
Jennifer Sorenson	Jsorenson01@gmail.com	Club Service Director
Joe Irick	joe.irick@yahoo.com	Vocational Svc Director
Julie Opheim	Jopheim@placertitle.com	Community Svc Director
Bob Fonarow	bobfonarow@kw.com	International Svc Director
Darrell Cooper	Darrell.cooper@charter.net	Director-at-Large
Scott Brennan	Scott@accesspublishing.com	Membership Director
Linda Midkiff	Lmidkiff105@gmail.com	Youth Service Director
Gail Tannehill	gailtannehill@yahoo.com	Club Awards Chairman
Steve Gregory	Steve.gregory@att.net	Public Relations Director
David Lundy	dlundy@insurica.com	Director-at-Large
Gail Tannehill	gailtannehill@yahoo.com	Pres Elect Nominee 2018-19
Randy Kohn	randocommando@sbcglobal.net	Finance and Investments
Jon Dallons	Jon@westernquartz.com	Sergeant-at-Arms
Doug Barth	Dougarth@sbcglobal.net	Rotary Foundation Chair
Nicolette Harley	Nicoletteharley@hotmail.com	Family of Rotary
Steve Gregory	Steve.gregory@att.net	Programs Chair
Brenda Cressey	Rotarybrenda@gmail.com	Webmaster
Bob Vilhauer	Rjvilhauer@gmail.com	Bulletin Editor

## The Object of Rotary

### THE FOUR WAY TEST: OF THE THINGS WE THINK, SAY, AND DO

1. *Is it the TRUTH?*
2. *Is it FAIR to all Concerned?*
3. *Will it build GOOD WILL and better Friendships?*
4. *Will it be BENEFICIAL to all Concerned?*

# The Paso Oak Leaf

Rotary Club of Paso Robles, California

93 years of service to the Community

Charter granted January 15, 1924

[www.pasoroblesrotary.org](http://www.pasoroblesrotary.org)

March 23, 2017

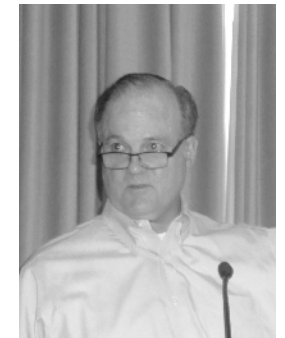
## Jim Wisdom, Certified Financial Planner Exit Planning for Business Owners

“Finish Big” is both a book title and mantra for Jim Wisdom who sells insurance in Westlake Village, but also coaches business owners on how to successfully transition their privately held firms to new ownership. Jim became interested in this subject after reading the book “Finish Big” by Bo Burlingham and attending the author’s seminar. Jim now does his own lecturing on the subject after studying the key elements of successful ownership transitions.

Jim Wisdom grew up in Rancho Palos Verdes and attended UCLA as well as the College of Financial Planning in Colorado. Jim is now a resident of Westlake Village and a member of the Westlake Sunrise Rotary Club. He has been a RYLA counselor and is the beverage coordinator for the CA Jazz & Wine Festival, the largest fundraiser for his Rotary club held annually at the Westlake Village Four Seasons Hotel in April.

Jim started his presentation by outlining four stages of an “Exit”: 1) exploratory, 2) strategic, 3) execution and 4) transition. He noted that few business owners are fully prepared, particularly emotionally. One of the most important tips Jim can offer is to start the planning process early. Some of the headwinds facing business owners are the “baby boomer tsunami” creating a glut of businesses for sale, entitlement programs that may not be solvent long term, longevity and rising health care costs that all impact retirement needs of owners.

Jim cited numerous case studies from “Finish Big” that can be illustrative to potential business sellers and get them to focus on issues or scenarios that they may not have considered. He believes the four most important outcomes for a successful exit are 1) both parties feeling they have been treated fairly, 2) a lasting sense of accomplishment about the business you are selling 3) feeling good about employees who stay and 4) a good sense of purpose on their next chapter of life.



## News You Can Use

- **American Heart Association Lunch** - The “Go Red for Women” fundraiser and awareness campaign will host their annual lunch on **March 31** from 11-1:30 at the Paso Robles Golf Club. Jean St. Martin is organizing a Rotary table for women who would like to attend. Tickets are \$55. Please contact Jean for further details.
- **Agri-Business Tour** - The Paso Robles Chamber has scheduled their 55th annual Agri-Business Tour for **Wednesday, May 3**. Tickets for this popular event went on sale March 1 at the Paso Chamber office so don’t delay as the event sells out quickly. Tickets are \$70 pp. Please contact Vicki Silva for further details.
- **Home Tour** - Paso Robles American Association of University Women (AAUW) will hold its annual Home Tour on **Saturday, May 6**, from noon - 3. Tickets are \$25 pp available at The Blenders (538 12th Street). Event proceeds fund high school scholarships. Please contact Gail Tannehill for further details.
- **Golf Tournament** - Chairman Rick Goree and his team are seeking volunteers, sponsors or auction item donors for this year’s tournament and auction. Chris Bausch is managing a volunteer sign-up sheet. Please contact Jennifer Idler-Farrell if you have items to donate for the auction. Tee sponsorships are only \$150. John Fisher announced the following new sponsors: Brookdale Senior Living Solutions, Joe’s Place, D-J Camping & Clothing, Pear Valley Winery, Mullahey Chrysler-Dodge, Hank’s Welding, Mitchella Vineyard & Winery, Trader Joe’s and others. The tournament will be held on **May 13** with the silent auction the evening of **May 12**.
- **Rotary International Convention** - Please consider attending the annual convention **June 10-14** in Atlanta, GA. Ralph & Paula Byrd, Bob Fonarow, Koene Graves, and Gail Tannehill will be representing our club along with Brenda Cressey who will be inducted as a Trustee of the Rotary Foundation. Interested members can register at: <http://www.riconvention.org/en/>.
- **Rotary Policy Changes** - Prez Tony announced 3 new policy changes. The Board will eliminate “pre-paid” lunches as of July 1. All members will just pay at the door. In addition, the Board will increase annual dues by \$25 per year to cover the cost of weekly lunches that currently exceeds the \$15 ticket price. Our club will also offer a new “Corporate Membership” for the coming year. Participating companies can designate up to 3 people to represent their firm. The corporate membership cost will be the same as for individual memberships. Contact Tony Wallace for more info.

## Coming Programs

- Today: Randay Canaday, Building Trades Instructor PRHS, Skills USA 2017 Lunch at the Culinary Arts Academy**
- Mar 30: Angelica Fortin, Librarian, Paso Robles Library & Foundation
- Apr 6: Loretta Butts, Past District 5240 Governor, “Peace Is....”
- Apr 13: John Shoals, Senior Public Affairs Rep, PG&E, Diablo Canyon Power Plant Closure - Joint Proposal
- Apr 20: David Blaine, Employment Attorney, Legalization of Marijuana and Its Impact on Employers

## Birthdays in the Next 30 Days

John Tubb	Mar 25	Dennis Buckley	Apr 3
Carol Craig (Gary Nelson)	Mar 25	Linda (John) Tubb	Apr 4
Don Jacobs	Mar 26	Darrell Cooper	Apr 5
Sally Davis	Mar 29	JoAnn (Bob) Vilhauer	Apr 6
Diane (Dennis) Cassidy	Mar 30	Jen (Brian) Stack	Apr 7
Justin Davis	Mar 31	Jennifer Idler-Farrell	Apr 8
Gary Eberle	Mar 31	Gail Harold	Apr 13
Steve Gregory	Apr 1	Jackie (Bob) Fonarow	Apr 14
Bob Villalobos	Apr 1	Keith Gillis	Apr 17

## Anniversaries This Week

*No Anniversaries This Week*

## Polio Plus Opportunity

Last week, visiting Rotarian Charlene Meyers and her husband Amos from Hilo, HI, joined us for lunch. Charlene is the District 5000 Polio Plus Chair. She auctioned off an eye catching mug of exploding volcanoes that appears bright red when hot water is added to the mug - as demonstrated by Charlene and Prez Tony (*left*). It was obvious from the lively auction that other members were interested in purchasing a mug that benefits Polio Plus. Mugs can be purchased at [www.imagesofhawaii.com](http://www.imagesofhawaii.com). The price of \$28 is considerably less than the auction price of \$150!

