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RANCHO SANTA FE FOUNDATION

June 24, 2005

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The second annual Financial Advisors Breakfast was held on Thursday June 16th at The Inn at Rancho Santa Fe. There were 35 people in attendance, most of whom serve in some capacity as advisors to the Rancho Santa Fe Foundation.

Lou Simpson was the keynote speaker. As a former Director of the Foundation who now serves as an advisor to the Finance Committee, he addressed the group about his role as Director and donor. His comments centered on his reason for becoming involved with the Foundation and his strong belief in “giving back”. He emphasized that the strength of this country is private giving and he and his family are committed philanthropists.

Six years ago, he says, he opened his donor advised fund at the Foundation and to this day he remains “a satisfied client”. He described the Foundation as being very donor friendly and through his fund, he is able to recommend grants to a large variety of charitable organizations. The grants are delivered promptly and efficiently.

We at the Foundation would like to thank Lou Simpson for his generosity in giving his time over the last eight years to the Board of Directors and to the Finance Committee. He has been instrumental in shaping an investment strategy that has been both conservative and “risk adverse”. As a result, those donors who have placed funds with us have been rewarded with efficient service and low cost management fees, as we partner in our charitable endeavors.