

Random Acts of Kindness



#12





From the desk of Barney Hellenbrand

At a meeting in Washington D.C., Pete Muckley of Trust Company of America sat next to me at a dinner and described an idea of encouraging our Financial Advisors to create a “Pay It Forward” program with their clients.

This idea immediately inspired me to suggest that we start with some of our top Advisors by giving them each a sum of cash to offer people in need whom they encountered. The idea was to provide an opportunity for them to share the spirit of the holidays by helping someone in need.

We sent a \$100 cash to each Advisor to be used for a charitable act of kindness of their choosing. We then asked the Advisors to share their stories with us. The hope was that this Pay It Forward idea would encourage our Advisors to consider using the idea with their own clients in the future.

As several of the Advisors that we chose are already financially successful, we were happy to find out that many of them added their own cash in addition to what we had given them to make it even more special and meaningful. As some of our folks were discussing how the results of their “Paying It Forward” with these little acts of charity and help was overwhelming, their emotions were palpable. Some of our Advisors described the emotions of the recipients as so powerful that there were no words they could find able to accurately describe the level of gratitude, joy and appreciation they felt for the gift.

We have compiled some of the responses we received in this brochure. We hope you will enjoy reading them as much as we did and find them a source of inspiration.

Ultimately, we believe that this program will create an ongoing and ever-growing momentum for the betterment of all concerned. Many of our Advisors have already decided that they are going to begin this program within their own families and businesses. Being able, in some small way, to directly impact the lives of everyday people who may be struggling is so gratifying, we may even create a desire to do more.

Warmly,

A handwritten signature in black ink, appearing to read 'Barney Hellenbrand', with a long horizontal flourish extending to the right.

Barney Hellenbrand
President and CEO
HBW Partners

Lisa found herself as a single mom recently when her husband walked out on her and their four kids. She has fought through the pain and heartache to be the best mom and support to those kids. It hasn't been easy but she's moved forward one day at a time through faith and support from loved ones. This past December, their family was involved in two car accidents on the same day. While waiting for the police to arrive at the scene of the first accident, her vehicle was struck by a truck. Thankfully, no one was injured but her van was totaled. Mutual friends of ours started a campaign to raise money for Lisa to purchase another vehicle. Being able to get her four young kids to all of their various activities is a big commitment and having a reliable vehicle to do so is important. So, we were blessed to pay it forward and help this wonderful young mom achieve this goal! Thanks for the opportunity to pay it forward!



Briana is a single mom who works at a diner. Earlier this year, she was shot in the leg in a gun accident. She returned to work as quickly as she could in order to provide for her four-year-old son. She probably returned to work too early after the accident but she persisted to do her job, even though walking and working on her feet all day was difficult and painful. We were able to help her out with the extra money to provide her some encouragement.



Anna is a world traveler who takes the most amazing photos I have seen outside of National Geographic. She is a regular contributor to our Sierra Club Friday night events, sharing her memorable photos and stories.

Anna just lost everything she owns, including all her photos, in the Thomas Fire, the biggest fire in California history. And she lost everything she needs for everyday living. She did not own the home she was living in and did not have insurance. Fortunately, it was just property she lost and not her life. Ironically, she had just moved to venture County from Santa Barbara so she could save money.

Anna stayed with me the first night of the fires and the week following that night. I was able to hear first-hand, and to a very small degree feel, what it's like to lose everything you cherish. She is such a valuable part of our community, and it is an honor to be able to give her something back.



I had lunch today at a restaurant and noticed a young couple at another table with a six-month old daughter. I stopped by their table on the way out to admire their baby and learned that this was their first child, her name is Payton, and it was her first Christmas.



I said goodbye and went outside to my car where I noticed the red envelope with the \$100 in it. I thought, "Why don't I go back inside and hand it to this young couple and tell them to open a savings account for Payton?"

When I did, they were shocked and almost in tears as they thanked me. There's no telling whether they will save the money, or use it for a current need or spend it on their daughter's first Christmas, but it sure felt good to "Pay It Forward."

I think I will do this again and match your funds. It is fun and rewarding to stun people with random acts of kindness. God bless you and thanks for the gift you gave me today in helping this young family!

Ubaldo has cancer. He has had a stem cell transplant and is awaiting its effectiveness. His wife and three daughters have come from Mexico on a three-month humanitarian visa to be with him. The \$100 was used for winter clothing for the three girls. We loved the idea! We are all blessed to be a blessing!



We loved your idea
this year of giving
back! We decided to
give the money to some
missionary's' children
who are starting
life in the U.S. and
could use a little
extra help.



I received your letter today, along with the \$100 bill. I knew right away who I wanted to give it to. I just found out that this young mother named Alicia is receiving treatment once again for a brain tumor they thought they had conquered, but has reared its ugly head once again, just in time for the holidays. I learned today that Alicia will probably be in the hospital on Christmas Eve and Christmas Day. Alicia and her husband, Benjamin, have three children, ages 3, 5 and 6, and they don't make a lot of income.

At a recent local event at our community center many kids were in line to sit on Santa's lap and were excited to ask Santa for the numerous toys they wanted for Christmas. When it was time for Alicia and Benjamin's six-year-old, he was overheard asking Santa to give his mom good health, and that he could use new gloves and a stocking cap. He didn't ask for any toys. Santa had to take a break to wipe tears from his eyes before he could continue with the other children.



Thank you for the Pay It Forward idea, it's made our holidays brighter!

I support the National Multiple Sclerosis Society through fundraisers every year. I asked the local chapter if any of the MS patients needed financial help. They said one patient, Stephanie, needed assistance to pay her medical bills. So I sent her a check. I hope to meet her at the annual recognition lunch on the 27th at Dana Point.

Here's the note Stephanie sent to us after receiving the money:

Thank you so much for your generosity and consideration in donating money to the National Multiple Sclerosis Society. I am deeply honored to have received the money. It came just in time! I was unable to purchase my medication due to a lack of funds. The price of meds was really expensive this year as I found out I don't qualify for subsidy from the government. Your help is truly appreciated. Thank you! - Stephanie







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