



The Pinnacle Award 2009

Recognizing Excellence in Charitable Planning

The Pinnacle Award 2009 Program

The Pinnacle Award

Recognizing Excellence in Charitable Planning

The Purpose of the Pinnacle Award is to honor an active, retired or deceased professional advisor (attorney, CPA, trust officer, CLU, CFP or other estate planning advisor) for outstanding voluntary service to Indian River County non-profit organizations in promoting charitable giving through estate and gift planning.

The Pinnacle Award is presented by the Indian River Estate Planning Council (IREPC) and the Planned Giving Council of Indian River (PGCIR).



2009 Pinnacle Award Recipient

SAMUEL A. BLOCK

Sam Block has been a resident of this county for his entire life and has been an active supporter of many not-for-profit organizations, both individually and professionally. As an attorney, Sam has been instrumental in encouraging and guiding some of this community's most generous philanthropists in their support of the missions of many of Indian River's charitable institutions. His volunteer service to non-profit boards and committees to promote gifts through estate plans spans his 36 year professional career and includes: Dollars for Scholars, Saint Edward's School, Temple Beth Shalom, Indian River State College Foundation, Environmental Learning Center, Riverside Theatre and Vero Beach Museum of Art. Sam's reputation precedes him. He is known for his modesty and general unwillingness to seek recognition for what he gives willingly from his heart to help the needs of his community.



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Second Annual Pinnacle Award Breakfast

Tuesday, April 21, 2009 – 8:00a.m. – 9:30a.m.
Quail Valley River Club – Waterfront Dining Room
Vero Beach, Florida

Hosted by Indian River Estate Planning Council
and Planned Giving Council of Indian River

Welcome _____ Richard H. Johnson
Event Chairman

Recipient Nominator _____ Frank Spitzmiller
*Director of Planned Giving
Saint Edward's School*

Recipient Introducer _____ Sandra Rennick
*President
Dollars for Scholars*

Award Presenter _____ Robin A. Lloyd, Sr.
*2008 Pinnacle Award
Recipient*

2009 Pinnacle Award Recipient _____ Samuel A. Block
Attorney At Law

Close _____ Richard H. Johnson
Event Chairman



Recognizing Excellence in Charitable Planning

Criteria for “The Pinnacle Award”

Recognizing excellence in charitable planning

Purpose of “The Pinnacle Award”: To honor an active, retired or deceased professional advisor (attorney, CPA, trust officer, CLU, CFP or other estate planning advisor) for outstanding voluntary service to local non-profit organizations in promoting charitable giving through estate and gift planning.

Criteria:

- Must be a professional advisor (this is not intended to be an award for personal philanthropy).
- Will have demonstrated exemplary volunteer service on boards and/or committees of local non-profits in Indian River County. What charities? What volunteer capacity? What length of service?
- Will have demonstrated longevity of their professional practice in Indian River County.
- Will have been involved in a leadership capacity in local professional organizations such as the Indian River Estate Planning Council and/or the Planned Giving Council of Indian River and/or others.
- Will be a person of high integrity who is respected by his/her professional peers.
- Will be a person whose volunteer activities, deeds and accomplishments are an inspiration to others in the professional community.

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5. Demonstrated Leadership in Indian River County professional organizations that promote gifts through estate plans:

- Planned Giving Council of Indian River:

Offices Held

Dates of Service

- Indian River Estate Planning Council:

Offices Held

Dates of Service

- Other professional organizations:

Offices Held

Dates of Service

6. Articles, books or other written publications to promote gifts through estate plans:

Title

Date

Publication

Purpose/Audience

7. Speaking Engagements promoting gifts through estate plans:

Topic/Title

Sponsor

Audience

Dates

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8. Other Contributions, activities, deeds and accomplishments that serve as an inspiration to others in the professional community:

<u>Date</u>	<u>Activity</u>	<u>Results</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

9. Longevity of professional practice in Indian River County:

<u>Profession</u>	<u>Dates of Service</u>
_____	_____
_____	_____
_____	_____

10. Is nominee Active, Retired or Deceased?

If retired, since what date: _____

11. Is nominee a person of high integrity who is respected by his/her professional peers?

Yes _____ No _____

12. Any other comments regarding nominee’s qualifications for this award:

Please submit this Nomination Form by January 30, 2009 to:

Pinnacle Award Committee
P.O. Box 644001
Vero Beach, FL 32964-4001



Sponsors

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Indian River Community Foundation

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Pinnacle Award Planning Committee

Richard Johnson, Chairman (PGCIR)

Kristine Sarkauskas (PGCIR)

Kerry Bartlett (PGCIR / IREPC)

William Kirk (PGCIR / IREPC)

Charles Sanford (IREPC)

Gregory Brown (IREPC)



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