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Proxy Parent Foundation

Proxy Parent Foundation offers two services.

We administer the PLAN of California Master Pooled Special Needs Trust, which is open as a trust vehicle for any disabled person in California.

We provide Personal Support Services for beneficiaries of our Special Needs Trusts who have a mental illness. Just like a loving family, we coordinate public and private social services and medical care while providing family-like attention to help the person improve his or her quality of life.

Proxy Parent Foundation is a dba of Planned Lifetime Assistance Network of California, a 501(c)(3) nonprofit corporation.

Visit us on the Web at
www.planofcalifornia.org
www.proxyparentfoundation.org

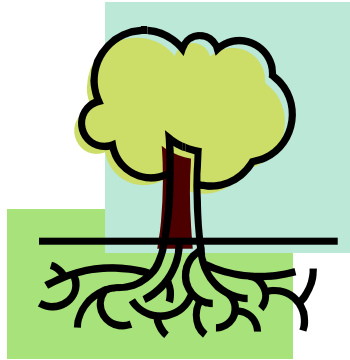
Proxy Parent Foundation
17602 Seventeenth St., #102-240
Tustin, CA 92780
714.997.3310
toll free 888.574.1258



Proxy Parent Foundation

The New Name of PLAN of California

Returning to Our Roots



Welcome the Proxy Parent Foundation!

A message from our President – Joe DeCarlo

For over 15 years, PLAN of California has been administering Special Needs Trusts and providing personal support services for those with mental illness. We have answered the question for so many families: "Who will care when we are not there?" And, that is what we do: We step into the shoes of the family and become the Proxy Parent.

Now, we are pleased to adopt the title of Proxy Parent Foundation as our public name because it so clearly states our purpose.

A Special Expertise

The heart of our organization touches countless people and it takes dedicated advisors and volunteers to guide and support our ongoing efforts. See Sergio's Story on p.3 to see the difference Proxy Parent Foundation has made because of our efforts to improve the quality in our disabled beneficiaries' lives.

This newsletter highlights a few of these talented and compassionate people who have joined the Proxy Parent Foundation to make a difference today, and well into the future for so many families and their loved ones.

Because of these dedicated volunteers, we continue to expand our Personal Support Services to people with mental illness and their families and we have successfully launched the growing PLAN of California Master Pooled Special Needs Trust, which is open to all disability groups.

Today, thanks to the involvement of our social, medical, legal and financial volunteers and professionals, the Proxy Parent Foundation is a perfect example of marrying the expertise of the business world with the needs of the nonprofit world.

Our Volunteers

Thomas D. Stevens Los Angeles Capital Mgmt.



Proxy Parent Foundation Board Member Tom Stevens is an Investment Manager by trade. But, he is a man that wears many hats. Long time residents of Westlake Village, he and his wife Barbara have raised three children and been active in many community organizations, especially youth sports. He has been a member of the Board of Governors for Special Olympics Southern California for 10 years and has primary responsibility for one of the key fund raising events for that organization. Through a good friend who has a son with mental illness, he was introduced to Proxy Parent Foundation. Once he met Carla Jacobs, Treasurer and

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past Executive Director, he became committed to working with Proxy Parent Foundation and setting up the structure for the PLAN of California Master Pooled Special Needs Trust.

“Carla has a knack for drawing in people,” Tom said, “Proxy Parent Foundation has an incredible potential to serve the needs of a large group of disabled individuals.”

Tom is Chairman and CEO of Los Angeles Capital Management, an institutional investment management firm with over \$6 billion in assets under management. The firm works with some of the largest pension funds in the world and, as its Chairman, Tom is responsible for setting the firm’s strategic goals and developing the firm’s portfolio management team. He serves as the primary contact for the firm’s largest relationships which are located across the US and in Europe.

In addition to his professional activities, he is also very active in several startup company ventures. One of his passions is helping to nurture young businesses & nonprofits into successful enterprises.

“Tom is one of the most decent people I have ever met,” said Carla, “He keeps on giving and giving of himself and his skills. Serving on our Board of Directors and the Business Committee, Tom has been instrumental in helping to recruit individuals who have the energy and expertise that are needed to help our families and achieve the goals of the organization.”

Steve Hawkins, PainePR



One of the individuals that Tom Stevens has recruited to work on Proxy Parent

Foundation’s Business Committee is his longtime friend, Steve Hawkins.

Steve is a managing partner of PainePR and provides strategic counsel to a broad range of clients in industries such as health care, biotechnology, banking and financial services, real estate, retail, consumer marketing, technology, automotive, and nonprofit.

Steve has a B.A. in political science and a master’s degree in international management with emphasis on international business, economics, and Spanish.

Steve is helping Proxy Parent Foundation develop a solid business plan from which we articulate our core mission: providing “family-like” personal support services to people with mental illness and acting as trustee of the PLAN of California Master Pooled Special Needs Trust.

A former journalist, Steve was West Coast News/Los Angeles Bureau Chief of *U.S. News and World Report* and a correspondent for McGraw-Hill World News.

Thomas Beltran, Esq.

Volunteering with Proxy Parent Foundation, Tom Beltran is the attorney who drafted the PLAN of California Master Pooled Special Needs Trust. Due to his extensive experience working within the disability community, Tom recognized how valuable a state-wide pooled trust would be for people who are disabled so that their assets could be used to enhance their quality of life while not impacting their eligibility for public benefits.

Tom’s areas of legal practice include disability-related estate planning, balancing the special needs of parent and child, Medicaid, social security, Medi-Care Set Aside issues, probate and federal rights litigation. In the mid-1980s, Tom was part of a Congressional demonstration project, leading to codification of the SSI work incentives. More recently, he was part of a task force to revise California’s special needs trust law and prepared the initial draft of the amendments.

Tom is also a master guitar builder, which served us well recently when Sergio’s (fictitious name) Special Needs Trust bought Sergio a workbench. {See Sergio’s story on

p. 3} Bruce, his Proxy Parent Foundation Personal Support Specialist, and Sergio tried to put it together to no avail. The Board and Care maintenance man then had a go at it: still no assembled workbench. Tom visited Sergio on the weekend and made short work of it. Now that the workbench is assembled, Sergio can pursue his hobby.

Tom is the brother of two siblings with disabilities.

Our Advisors The Summa Group

PLAN of California engages Oppenheimer & Co. Inc.’s, The Summa Group to manage the investment and reinvestment of the assets of the PLAN of California Master Pooled Special Needs Trust. The firm has been providing financial services for over 120 years.



Tyler Dritz acts as Advisor to the Proxy Parent Foundation Board of Directors, through its Business Committee, to provide a continuous investment program for each beneficiary’s subaccount within the Trust.

Tyler joined The Summa Group in January 2005. His responsibilities with them cover all aspects of investment policy, including overseeing the development and implementation of asset allocation strategies.

Prior to joining Oppenheimer and The Summa Group, Tyler spent four years at Wilshire Associates Inc. working with and consulting clients, including public, corporate, endowment and foundation funds, where he was responsible for institutional investment manager research and manager selection.

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Proxy Parent Foundation
17602 Seventeenth Street, #102-240
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ADDRESS CORRECTION REQUESTED

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a dba of Planned Lifetime Assistance Network of California

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() Please use this donation to provide Proxy Parent Foundation's help to those who need it in the "here and now".

() Please use this donation as our Proxy Parent Foundation enrollment donation.
(Enrollment donations must be \$1000 or more and can be made in payments)

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