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On the Cover

Nancianne and Joachim Parrella enjoy an independent lifestyle at Deupree House. The couple's lifelong passion for music continues to offer wonderful opportunities. Read their story on page 8. Cover photo by Jonathan Willis.

ERH Communities & Services

Premier Retirement Communities Deupree House Marjorie P. Lee

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Linkage is a resource to address issues and interests of older adults, providing a link between ERH's programs and the community. For 60 years, Episcopal Retirement Homes has been a not-for-profit, financially sound organization dedicated to improving the lives of older adults through innovative, quality services based upon their values and delivered by highly experienced, deeply committed professionals.



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Ohio Association Honors ERH Staff

eadingAge Ohio, an association that represents approximately 400 nonprofit organizations that provide senior services in the state, recently honored two Episcopal Retirement Homes (ERH) staff members at its annual conference, September 7-9, in Columbus, Ohio.

Jim Hanisian, Vice President of Ministry and Compliance

Excellence In Fundraising

LeadingAge recognized Hanisian with its Excellence in Fundraising award, given for creativity and achievement in fundraising initiatives. Despite a challenging economic environment for not-for-profit organizations, Hanisian's efforts helped ERH exceed its fundraising goals the last five years in a row. In 2010, ERH raised more than \$2 million, nearly doubling its original goal for the year.

Hanisian credits the positive results to the outstanding fundraising team he's assembled, as well as a shift in strategy that puts the focus on potential donors' interests and passions. "Instead of asking, we listened. This donor-centered approach has made all the difference. Even in this economy, people care deeply about those in need," Hanisian says.

Hanisian, who joined ERH in January 2005, has a Master's degree in Ministry from the General Theological Seminary in New York City, and a Ph.D. in Administration and Systems from The United Theological Seminary.

"Personally, I am humbled by the award; it is an honor to be recognized by my peers," Hanisian says. "This award adds to the growing recognition of our high standards and high quality of service in our industry and in our community."

Peggy Slade-Sowders, Director of Living Well Senior Solutions

Excellence In Service

LeadingAge Ohio bestowed its award for Excellence in Service for Home- and Community-Based Services to ERH's Peggy Slade-Sowders, recognizing her outstanding initiative, motivation and leadership in the provision of quality home- and community-based services.

Specifically, Slade-Sowders went the extra mile, quite literally, for one of ERH's residents. In June 2010, resident Carol Starrett flew to Los Angeles to be with her

son, Scott, as he was honored as the top television composer for his work on Lifetime Television's "Drop Dead Diva."

Without Slade-Sowders' dedication as Scott's geriatric care manager, however, the trip wouldn't have happened for the 67-year-old, who suffers from diabetes, renal disease and requires frequent dialysis. Through six weeks of focused effort, Slade-Sowders made all the necessary preparations, such as scheduling out-of-town dialysis for Starrett, preparing blood sugar and blood pressure monitoring equipment and supplies, and ensuring the airlines were prepared with accommodations.

What's more, Slade-Sowders accompanied Starrett on the journey, assuring that a voyage that seemed against the odds became a once-in-a-lifetime success.

"Peggy is a consummate professional," says Doug Spitler,
President & CEO of ERH. Everything that she does, she does with great care and professionalism.
She has an incredibly deep level of compassion for older adults and their families." —Steve Smith



Meet The Board

The Episcopal Retirement Homes (ERH) Board of Directors makes it a priority to serve the ERH mission: enriching the lives of older adults in a personcentered, innovative and spiritually based way.

"ERH has struck a perfect balance between being mission-driven and having a very well-thought-out business strategy," says Trish Martindell, Chair of the board and former Procter & Gamble executive.

In this and upcoming issues of Linkage, you'll meet the dynamic board members that help drive ERH. We begin with three of these passionate volunteers, profiled below. *By Whitney Harrod // Photographs by Gary Kessler*



Trish Martindell

Board Chair

Occupation: I am retired from Procter and Gamble after 26 years, most recently serving as Director in the Information Technology Division.

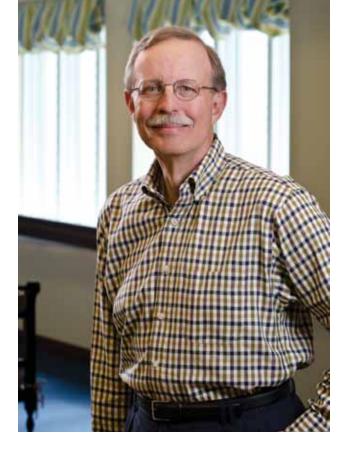
Area of Expertise: I hope I've brought the skills of being a leader and strategic thinker to ERH. While being Chair is a big time commitment, every minute is time well spent. It's a challenging responsibility, upon which I thrive.

How long have you been with ERH? I have been on the board of directors for the last five years, and Chair since January 2010. I was first involved with ERH as the Chair of the Family Council at Deupree in 2001, when my father was a resident at Deupree Health Center.

Why do you volunteer on the board? I wanted to give back to the organization that took such wonderful care of my father.

Most rewarding part? The people I have gotten to know. ERH has created a culture throughout the organization that attracts the highest quality of people. I also love the challenges of learning the complexities of the business – something I miss about Procter & Gamble.

Something people might not know about you: Our family enjoys international travel. We've been to Paris, London, Italy and Mexico. I've volunteered 21 years on the Multiple Sclerosis board, 13 years on the Beechwood Home board.



Harry Kangis

Vice Chair, Marketing and Public Relations

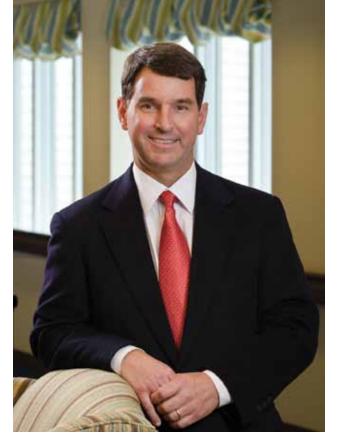
Occupation: Independent strategic planning consultant and a founder of the One Page Strategic Plan® process.

How long have you been with ERH? I started in 2005 by using the One Page Strategic Plan process to help upgrade ERH's strategic planning discipline and have served on the board for about five years.

Why do you volunteer on the board? My mother-in-law has been a resident at ERH's Marjorie P. Lee community in Hyde Park for about nine years, and my wife and I are most appreciative of how ERH provides such a caring and nurturing environment for all of its residents.

Most rewarding part? It is very fulfilling to know that I am part of an organization providing unsurpassed care for seniors of all income levels. It's been fascinating to learn so much more about the aging process, and the many steps we can take to make these years healthier and more fulfilling.

Something people might not know about you: I am a life-long conservationist and currently serve as Chair of the Ohio Nature Conservancy board.



Jeffrey P. March

Vice Chair, Affordable Housing

Occupation: CEO of BRG Realty Group, which owns and manages about 6,300 apartment units in Greater Cincinnati and Northern Kentucky.

Area of Expertise: My experience in starting and growing an operation in the multi-family housing industry is useful to ERH, as we serve more seniors in the affordable housing business.

How long have you been on the Board? Since 2004.

Why do you volunteer on the Board? It was an easy decision since my parents were residents of Deupree House.

Most rewarding part: Seeing the positive impact that ERH's management and staff have on the residents. The culture of caring is pervasive throughout the organization. I've seen it firsthand with my parents as they have aged.

Something people might not know about you? I was an adopted child, and as a result, I'm very aware of how blessed I've been to be part of an incredible family, and to have so many life enhancing opportunities. My parents always lived the example of giving back to our community and serving others—lessons I've taken to heart.



Around the Communities

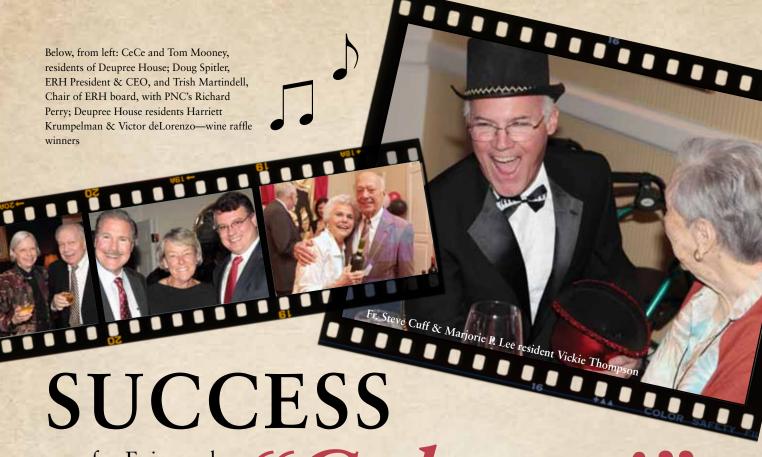




ZDC 3

- 1. A summer picnic at Devou Park becomes the perfect place for Marjorie P. Lee residents to share good food and great conversation.
- 2. ERH staff members congratulate Jim Hanisian (front row, second from left—sort of!) and Peggy Slade-Sowders (front row, third from left) on receiving awards at the 2011 LeadingAge Ohio Conference in September.
- **3.** Deupree House residents enjoyed a close encounter with several animals during a recent informative visit to the Cincinnati Zoo & Botanical Garden.
- **4.** Meals on Wheels volunteers Mike and Amy Montgomery bring food and cheer to clients with grandson, Nicholas.





for Episcopal Retirement Homes' Annual Gala

"Cabaret!"

Retirement Homes' (ERH) sixth annual gala at the Hyde Park Country Club on September 30th. The event raised more than \$100,000—a recordbreaking amount for an ERH event!

Mary Ellen Tanner, along with her three-piece band, delighted guests with songs from the heart, and the décor and "flapper girls" made it a night to remember. The evening began with hors d'oeuvres and cocktails and continued with a gourmet dinner, silent auction, wine raffle and dancing to live music.

"I thought the gala was great!" commented Linda

Stetson, a gala committee member and an ERH board member. "My guests thoroughly enjoyed the evening."

"Cabaret" benefits ERH's annual fund, the Good Samaritan Mission, which helps to improve the lives of older adults throughout Southern Ohio. The fund provides money for resident financial aid, chaplaincy programs in our communities and outreach programs, such as Deupree Meals on Wheels and Parish Health Ministry. The Good Samaritan Mission enables ERH to keep its promise never to ask a resident to leave an

ERH community for financial reasons.

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In Tune with Life

One Couple Living in Harmony

by Coleen Armstrong // photography by Jonathan Willis

lthough most Deupree House residents are aware that there's a musical celebrity in their midst, few realize the extent of her accomplishments. Nancianne Parrella, 75, is associate organist at the Church of St. Ignatius Loyola in New York City. Long connected with pioneer choral conductor Robert Shaw, she toured and recorded with him in the United States, France and Brazil—and collaborated with many other noted conductors as well. As an emeritus faculty member at Westminster Choir College of Rider University in New Jersey, she accompanied their renowned choir and was its assistant director.

Featured frequently nowadays on the Church of St. Ignatius Loyola concert series, Sacred Music in a Sacred Space, Nancianne still finds that her active performance and CD recording career requires a lot of traveling.

Meanwhile, back at Deupree, her husband Joachim, 81, has developed a bustling social life. Most evenings, he joins five other ladies for dinner—with or without Nancianne, but

always with his wife's full blessing. Back when they lived in their sprawling Princeton Junction, N. J., house, Nancianne could be gone for weeks at a time. And though Joachim kept busy and worked at the church, the homestead could be a bit quiet. Now things are different. An avid follower of The Wall Street Journal and The New York Times, he cheerily keeps his dinner companions wellinformed about what's happening in politics, business, education and finance.

The Parrellas have occupied their apartment since August 2010. Both use the wellness center's exercise equipment, swim in the pool and hang out with friends. Nancianne is free to pursue her still thriving vocation, and Joachim is free to read, relax and mingle. Chores like grass cutting and snow removal are distant memories. The Deupree House staff, Joachim marvels, won't let anyone so much as climb a ladder to change a light bulb; he just picks up the phone, and someone appears within minutes.

So what are two such healthy and vital people doing in a retirement community?

Staying ahead of the game—and giving the entire concept of independent living a brimming-with-positive-energy spin. Just a few years ago, daughters Lisa (in Loveland) and Amy (in Hobe Sound near West Palm Beach) were growing concerned that distance made it impossible for either of them to be on the spot should a need for help arise. They urged their parents to move closer to one of them. Since Florida was both too muggy and too buggy—in Joachim's mind a double-headed deal-breaker—the couple chose southwest Ohio. By the time they discovered Deupree House, only two two-bedroom apartments were still available. They grabbed one.

Hardly able to believe their good fortune, they now point out to anyone who will listen that despite our cultural denial of aging, time does indeed march on. Like many Deupree residents, they chose to make the move at the peak of their health so they could enjoy the activities and their new friends, while leaving behind the hassles of maintaining their own home.

"People regard this kind of change as a big boulder," Joachim says, "when in reality it's just a bunch of little pebbles. No part should ever be beyond anyone's grasp if you do it early enough."

"They haven't skipped a beat," agrees ERH marketing assistant Megan Kron. "This is their home now. Both Joachim and Nancianne are perfect examples of how community living doesn't mean giving anything up—in fact, you gain so much in terms of freedom. You don't worry if the yard isn't mowed. You don't need to stay home and wait if a maintenance worker is scheduled."

Another great bonus, says daughter Lisa, is that so many Deupree House residents were so respected in their chosen professions that intellectual conversations are constant and ongoing, something both of her parents relish. "There's always room in your life for new friends," Joachim declares. "The relationships that Nanci and I have developed here will definitely be long-lasting."

"The whole atmosphere is very congenial," Lisa

adds. "Even the lawn guys will stop, wave and offer to direct visitors. And when I'm in the elevator I'll read the event postings and think, 'Gee, I'd love to go there or do that.'"

Of course, like all downsizers, Joachim and Nancianne found pruning a lifetime collection of possessions quite a challenge. There was, for example, that enormous custom-built practice organ in the living room, a fixture for 35 years, along with their many stacks of sheet music. (Both husband and wife were longtime music instructors, and Joachim handled logistics and essential bookmarkings for one of his wife's conductors.) Nancianne wound up giving the organ to a touched and grateful friend and then purchased a more compact Johannus three-keyboard electronic organ from the Netherlands. It sits in their spare bedroom, now designated as the music room. "A wonderful, attractive instrument," she says, "with a great digital sound."

One more pleasant surprise: the insulation in Deupree's walls, ceilings and floors, it turns out, is apparently more than generous. How does she know? No one else can hear her play. "People keep asking me," she laughs, "'when are you going to start practicing?'"

Nancianne began both piano and organ lessons while still a teenager, but was encouraged by her teacher early on to specialize as an organist. "You'll always have a job," he told her. That prediction

Clockwise, from top: Nancianne Parrella sits at her Johannus electronic organ in her Deupree House apartment; Nancianne honed the necessary skills to work multiple keyboards and pedals to create rich, distinctive sound; Organ shoes are designed to facilitate play and tread easily on pedals; Nancianne plays the acclaimed Mander Organ at the Church of St. Ignatius Loyola in New York city. The 5,000-pipe, 45-foot-high instrument is the largest tracker organ ever built in the British Isles.

Mander Organ photograph by Laurie Lambrecht.









has proven correct. She was already playing in churches during her freshman year in college, and has embraced Presbyterian, Lutheran, Episcopal and Catholic services equally well, with 17 years now logged at the Church of St. Ignatius Loyola. Her instrument there, built by the firm N. P. Mander, is one of the largest English tracker organs in New York City.

An organ's enduring appeal, she says, has much to do with the drama of the liturgy, its solemn rituals and grand traditions. Only those majestic pipes can truly convey the proper dignity by literally filling a cathedral with sound. She's currently planning one of her signature Organ Plus! recitals for Deupree House sometime in 2012. It combines the organ with a violin, cello and harp.

Her staunchest supporter has his own plans. Joachim is growing more domestic; he likes to experiment in the kitchen. He hosts gourmet gatherings—pre-dinner antipasto appetizers and cocktails for several close friends. And he'll enjoy the additional companionship of his wife, Nancianne, at one of these next special gatherings, when she's home again and her recital plans are firmly in place. Aahhh...life is good!

Early Birds

At first it sounds counterintuitive to consider selling your home and moving to a retirement community while you're still strong and mobile. But Joachim and Nancianne Parrella heartily recommend it—in fact, they say that they should have done it much sooner.

Heading the list of perks is sparing loved ones the ordeal of sorting and hauling your "stuff," and then worrying about how you're getting along. All orchestration becomes your job, not theirs, and at Deupree House, that carries far more advantages than drawbacks:

- Rapid adjustments. The entire process—from making financial arrangements, to selecting which possessions to keep, to the overall logistics of moving to a new residence—will be far less stressful if you're still the one in control.
- Social networking. You'll make friends within your own age group. No one will look baffled when you bring up Dick Clark's American Bandstand or Nikita Khrushchev's United Nations shoe-banging.
- *Gracious dining*. White tablecloths, real silverware, and—believe it!—a pre-dinner cocktail hour.
- Vanishing chores. Tree trimming, driveway plowing, deck power washes, gutter repairs—all disappear permanently. Soon it's like they never existed.
- Hotel-style amenities. You can pick and choose which ones sound most appealing. Some people love having a laundry service; others prefer doing it on their own.
- On-site and off-site offerings. A wellness center with exercise programs, a myriad of special activities and cultural field trips all make participation fun and transportation a non-issue.
- Emergency aid. Regular monitoring by staff members guarantees that no predicament ever goes unattended.
- Seamless transitions. As needs change and more care is required, moving from independent to assisted living is simple and efficient, rather than a major lifestyle upheaval.



Geriatric Care Management

When families don't know where to turn, a geriatric care manager is the bridge between worry and peace of mind. By Judi Ketteler

eggy Slade-Sowders may never walk on the red carpet, but last year, in her role as Director of Living Well Senior Solutions where she heads up geriatric care management—she got to do the next best thing: help her client, Carol, travel to California to walk the red carpet with her son as he accepted the Composer of the Year Award from The American Society of Composers and Producers.

Of course, not all of Slade-Sowders' responsibilities are as glamorous. But as the person who helps to coordinate everything from nursing care to grocery shopping to gutter cleaning, there aren't many limits to her job description.

"If you can think of it, Peggy will do it," says Kathy Ison, Vice President for Affordable Housing and In-Home Services. "It's almost like she is a professional family member." In fact, Slade-Sowders recently had her own red-carpet moment. In September, she traveled to Columbus to receive the Excellence in Caring Award, given by LeadingAge Ohio, a professional not-for-profit advocate group for older adults.

The Geriatric Care Manager Difference As a geriatric care manager, Slade-Sowders offers a comprehensive way to manage the care of an older adult. Usually, Slade-Sowders is called in when there is a crisis, such as a fall or an illness, or a change in circumstances, such as a caregiver moving out of town. "In those situations, families suddenly have a challenge," she says. "They start asking: what should happen? What services does the family member need? Do they need in-home care? How much, and in what form? A care manager assesses the situation: the parent, the family situation, the support they have in town, and comes up with recommendations for keeping the person happy and healthy, with as much control over his or her own life as possible."

Slade-Sowders is able to provide the big picture overview of the situation, and—unlike the family members who are emotionally connected to the situation—she is an objective third party. When Slade-Sowders is called into a situation, the first thing she does is put together an assessment. This is extremely helpful for family members who



are trying to figure out how much care, and what type of care, their loved one needs. For example, the children may think their mother needs eight hours a day of inhome services, but in reality, she only needs four. "We're always looking at rates and trying to figure out the most cost-effective solutions," she says.

Managing the Pieces of the Puzzle

The other key service a geriatric care manager provides is managing the pieces of the puzzle. "Peggy makes sure that everything fits together well, so that the clients do really well in their environment, and stay healthy, take their medication, go to their doctor appointments, and generally have the proper support services they need," Ison says.

Slade-Sowders takes care of

getting the right referrals and finding the right people. She interviews caregivers carefully. "Peggy knows that the emotional relationship has to be right, and she is great at figuring out the right fit," Ison says. If there is a situation with a caregiver, Slade-Sowders is the liaison, which is particularly helpful when the children are out of town. "It really reduces stress for the family, because they can rely on the care manager as a go-to person," Ison says. "It's a huge relief for them."

Slade-Sowders is always looking for the route that both serves the client best and is the most cost-effective. Skilled care can be expensive. So can taking time off work or burning through vacation days. Slade-Sowders understands this, and because she knows the system so well and understands what solutions the client needs, she can navigate the waters more quickly than a family member who doesn't. She also helps clients deal with the day-to-day, from paying bills to cutting the grass. In fact, she has built up a huge network, from caregivers to handymen.

She emphasizes that children shouldn't wait until there is a crisis to call. If you have an aging parent you're concerned about, and you're starting to notice some warning signs (see below), call Slade-Sowders to schedule an initial consultation or to ask for a Planning Ahead guide. You can also request the guide online at livingwellseniorsolutions.com (scroll to the bottom of the page for the link). Slade-Sowders will come to a family member's home or meet with families in her office. Contact her at 513-561-0222 or pslade-sowders@erhinc.com.

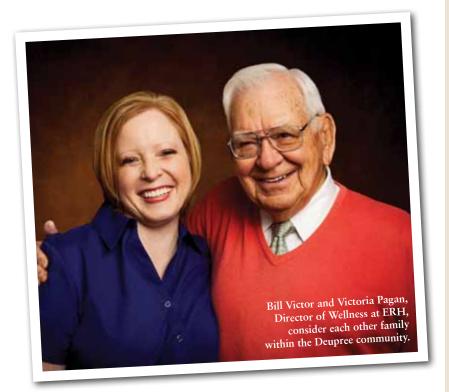
Signs to Notice

WHEN YOU SEE older adult family members frequently, it's easy to miss the signs that indicate they may need the help of an outside caregiver. But the holiday season—when you touch base with family members whom you don't see day in and day out—is a good time to take special notice. Take note of these signs:

- Decline in personal cleanliness/hygiene
- Trouble managing medications; confusion about prescriptions
- Change in personality; not interested in things that used to interest them; irritable, anxious or more easily upset
- Withdrawing from social scene; not visiting with friends anymore, or not following usual patterns (going to church, etc.)

- Trouble performing daily housekeeping tasks; dirty laundry/dishes piling up, simple home repairs not made, lights not working, thermostat not adjusted, outside of home unkempt, bills not getting paid
- Unexplained weight loss, especially if there is spoiled food in fridge or shortage of food in the home

As for initiating the conversation, it's important to recognize that your agenda is not the same as an older adult's agenda—he or she will want to remain in control of life choices as much as possible. Also, says Peggy Slade-Sowders, Director of Living Well Senior Solutions, be careful of trying to squeeze all conversations and decisions into one visit: "It takes time. I always say that adult children need to start talking to their parents early and often, because it can take a while for older adults to come to the realization that they need outside care or help."



Donor Spotlight

ERH Legacy Society

piscopal Retirement Homes would like to recognize and share their appreciation for a couple who were among the first to move into Deupree House II and who have enjoyed every moment since.

Pat and Bill Victor have been very active in resident council, the wellness program and thoroughly enjoy participating in the Council for Life Long Engagement (CLLE).

The Victors shared their feelings about Deupree House with Lori Asmus, ERH's Major Gifts Officer. They define the lifestyle at Deupree House as "inter-dependent living" rather than "independent living." They find a loving and supportive environment between the residents and the staff that feels like an interdependent community of friends looking out for one another.

This experience and feeling about Deupree House recently led Bill Victor to complete a joint life charitable gift annuity with Deupree, which is funded with appreciated stock.

ERH is grateful for the Victors' leadership, volunteerism and generosity to Deupree House. Please join Episcopal Retirement Homes in celebrating and welcoming Pat and Bill Victor to the Deupree Legacy Society.

Donor Wise: Legacy Gifts

Cors & Bassett has served clients in Greater Cincinnati and Northern Kentucky for many decades. Barry Cors is a member of the Estate and Tax Planning Group and has extensive experience in estate planning, trust and probate administration. Ken Kinder is a CPA and attorney.

For many people, leaving a legacy gift may involve designating a portion of an Individual Retirement Account upon death to a charity. But, did you know you can use an IRA as an immediate source for gifting?

Ken Kinder shares: "The main benefit of a current gift from an IRA is that it can allow clients to see their dollars put to work during their lifetimes. In addition, gifting now, versus after death, may also reduce tax liability, and it doesn't require use of liquid resources." All current IRA gifts must be completed by December 31, 2011 to conform to current tax laws, unless the laws are extended.

Barry Cors, who is also a resident of Deupree House, adds: "The IRA gift is not included as taxable income. However, you do not get an income tax charitable deduction, which can be beneficial for those who do not itemize deductions. Gifting retirement assets before year-end really amounts to a wash and ensures the money is not subjected to estate, gift or income taxes. A lot of people may not need or want to take their Required Minimum Distribution as income and may prefer using these dollars for a charitable purpose."

Talk with your financial advisor about gifting from your retirement plan.



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Save The Date!

Refresh Your Soul Conference 2012 Spiritual Care in Times of Trial and Loss

Saturday, March 10th, 8 am-2:30 pm

Community of the Good Shepherd, Montgomery (northern Cincinnati)

Featuring: Douglas C. Smith, M.A., M.S., M.Div.

Conference opens Friday evening, March 9th, 6-8:15 pm Dinner and Keynote Presentation I Could Die Laughing: Promoting Humor with the Sick and Dying



Doug Smith is a dynamic professional speaker, trainer, consultant and counselor with a diverse background working in

hospitals, hospices and social service agencies. He is the author of several books and published articles in numerous professional health care journals. He has led workshops in all 50 states. He also speaks from the heart as he shares his inspiring journey having faced many personal trials and loss. For more information, please call Ellen Schneider at 800-835-5768 ext. 4545. Registration will be available online beginning January 2012 at www.parishhealthministry.com.