

V O I C E

News of the Long Island Chapter of the Association of Fundraising Professionals

The Association of Fundraising Professionals (AFP) represents more than 30,000 members in 227 chapters throughout the world, working to advance philanthropy through advocacy, research, education and certification programs. The association fosters development and growth of fundraising professionals and promotes high ethical standards in the fundraising profession.

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Pioneering Diversity

By John Skendall, Reprinted from *Advancing Philanthropy*

When Mary Garrote, director of development and community relations for the Girls Scouts of Suffolk County (www.gssc.us) in Commack, NY, and chair of the diversity committee, AFP of NY, Long Island Chapter, set out to create a diversity program in her chapter, she knew one thing for certain: She was no expert on diversity. This awareness, however, has probably been her greatest strength. After all, diversity is by definition something that no one can achieve on his or her own. It is a process of reaching out – asking and listening – gaining perspectives from outside oneself.

The 2011 winners of the Charles R. Stephens Award for Excellence in Diversity (241-400 member category), Garrote and her chapter colleagues now have a greater appreciation for what their chapter stands for and have seen membership grow as well.

Initially, Garrote was aware that AFP defines diversity as seeking and achieving a broad representation of experiences, perspectives, opinions and cultures. Seeking implies going

beyond existing boundaries, so that is exactly what she did. “Looking at my board members, I saw many people who looked the same, and I knew we had to change that,” Garrote says. “So we set up a committee whose members were diverse, just like the people we wanted to reach.”

(CONTINUED ON PAGE 7)



AFPLI Philanthropy Day: November 18

5 Questions and Answers with Rob Taylor, Philanthropy Day Chair

Q: What is Philanthropy Day?

A: Philanthropy Day is celebrated in November in cities across America. Fundraising professionals, board members, business leaders, community activists and individuals gather for professional development and to honor their leaders. Long Island’s Philanthropy Day is one of the largest one-day fundraising conferences in the country and regularly attracts more than 600 attendees and a whole host of exhibitors whose wares are relevant to development professionals. The highlight of the day is, of course, the Awards Luncheon.

Q: What is the benefit to me and my organization?

A: There are 12 educational workshops plus the keynote address and a live gift solicitation session designed to provide you with innovative ideas and tools. Also, you will have time to network with hundreds of colleagues providing you an opportunity to refresh relationships and share experiences. (CONTINUED ON PAGE 2)

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Editor
Tammy Severino
Graphic Designer
Ellen Fleury

A Message from the President

by Fran Karliner
Director of Development, Long Island Crisis Center



Dear Friends and Colleagues,

“Fundraising is the gentle art of teaching the joy of giving”...Hank Rosso

So, what gives us, the fundraising professional, the inspiration and the motivation to fulfill this important mission? Where do you get your inspiration and motivation from?

Of course, believing in the mission of the organization/institution you are fundraising for is the primary driving force. But, in today’s fast-moving and ever-changing world, updating your “toolbox,” perfecting your skills and honing the art, is more important than ever. It’s important to talk to others in the field, to find mentors, to network for the best resources, to be on the cutting edge of fundraising strategies, and to find motivation and inspiration from others.

With all this in mind, I invite you to participate in Philanthropy Day this year. It takes place on Friday, November 18th at the Huntington Hilton and promises to be a day filled with an inspiring keynote speaker, Dr. Calvin Butts...a schedule of motivating educational tracks...and a networker’s panacea!

I want to especially thank this year’s Philanthropy Day Chair, Robert Taylor, Awards Chair, Mary Garrote, and Education Committee Chair, Alan Kelly. They have worked hard to deliver an exciting and information-packed day for all. Thanks, too, to the entire committee for their participation and all their efforts in putting together the many components of the day.

AFPLI’s activities do not begin and end with Philanthropy Day. At any time during the year there are mentoring opportunities available to you. Our Certificate in Fundraising, offered in partnership with Molloy College, receives rave reviews, year after year, from those who have participated. Our monthly educational meetings are planned to bring you the best speakers on the timeliest topics. Our Diversity Committee is working to create an atmosphere of inclusion for everyone and its Networking Socials are an effective way to meet on a one-to-one basis.

Come be inspired and motivated with us. I look forward to seeing you...at Philanthropy Day and at all our events.

Sincerely,

Philanthropy Day

(CONTINUED FROM PAGE 1)

Q: How do I register?

A: Send an email to info@afpli.org.

Q: What is “The Ask...The Gift...The Why?”

A: This segment of the day is an innovative gift solicitation session designed by experts

and judged by grant makers. The top prize is up to \$5,000. For more details, go to our website at philanthropyday.org or email George Richardson at richardg@stjohns.edu.

Q: How can I help?

A: You have many opportunities to help. Encourage your colleagues to register. Solicit a vendor to support AFPLI as a sponsor or exhibitor. If you would like to volunteer to help, send me an email at rtaylor@lambridesny.com.

“I have always been taken by the simplicity of bumper cars – when they get knocked off course, a little effort brings them back to the right direction.”

James Meyer



And so it is with Planned Giving (PG). By having the full range of concepts, strategies and products in your “Planned Giving Tool Box”, you will be able to hold the course when donors or donors’ advisors ask the tough questions. I am borrowing a bit from the first article I wrote for the Voice in ‘01 as I celebrate ten years of contributions to the newsletter. Planned Giving is an inescapable dimension of fundraising and ignoring it is an act of wonton imprudence. It questions – why is there such a dearth of PG programs and why is it so easy to have a PG program knocked off course? The answers lie in a combination of factors including, but not limited to:

- A lack of knowledge about planned gifts.
- A short-sightedness as to the scope of what planned gifts can accomplish.
- Not really understanding that PG programs can be run at different levels of commitment (staff, time and budget).
- A fear of losing gifts from the more traditional fundraising programs.

The answers above are as true today as they were ten years ago. Further, the analysis of inter-generational wealth transfer is still in the trillions of dollars and the agencies that prepare to mine those funds will be the ones that succeed. As many of you are aware, the majority of the funds are in IRAs and qualified retirement plans as well as homes. But how many of you have taken courses or attended seminars which

would help you discuss those types of gifts with donors. The future is clear as to where the larger gifts will come from and it is up to you to prepare yourself so that you can be successful in the effort.

Switching topics – to quote Margaret May: Transformation Through Virtuous Philanthropy, “with gridlock in Washington and riots in London...has Charles Dickens’ epic novel “A Tale of Two Cities” become more fact than fiction some 152 years since it was first published?” The real question is how will the economic downturn affect the philanthropic sector. The more obvious answers are guestimates of gift giving dropping, corporate support waning, foundation funds shrinking and Congress looking again at reducing charitable tax breaks. As with any corporate entity, questions of employee compensation and benefits arise when the economy tanks. The less obvious answer to the question is that the non profits are no different than for profit corporations, but face even greater scrutiny when they receive public funds.

Recently, Governor Cuomo appointed a task force to look into executive compensation at non profits where state funds are given to care for individuals in group homes, etc. The actual scrutiny started years before, on the federal level, when Form 990 was changed. Specifically, the IRS was looking into debt consolidation companies that filed as 501(c) 3s. The next round was the hospitals. Now New York State is in the process of examining the books through a questionnaire regarding executive and administrator compensation, traditional and non-traditional benefits, reimbursements, etc. and especially for those receiving compensation above \$100,000. Will other governors follow suit?



James E. Meyer is Partner,
Greco Planning Group, Inc.

New Members

Kelly Albanese

CCS
461 Fifth Avenue 3rd Floor
New York, NY 10017

Stacy Bona

National Multiple Sclerosis
Society LI
108 Mill Drive
Mastic Beach, NY 11951

Donna Borrill

AHRC Suffolk
2900 Veterans Memorial Hwy.
Bohemia, NY 11716

Joseph Conefry

Holy Trinity Diocesan HS
98 Cherry Lane
Hicksville, NY 11801

Marie Connolly

Jefferson's Ferry Foundation
One Jefferson Ferry Drive
South Setauket, NY 11720

Benjamin Esposito

Camp Alvernia
PO Box 301
Centerport, NY 11721

Ariel Esposito-Bernard

Camp Alvernia
PO Box 301
Centerport, NY 11721

Diane Fabel

Stony Brook University
Bioengineering
Stony Brook, NY 11794-5280

Marion Flomenhaft

Molloy College
P O Box 5002
Rockville Centre, NY 11571-500

Gina Garcia

Long Islands Children's Museum
11 Davis Avenue
Garden City, NY 11530

William Gatz

Long Island National Golf Club
1793 Northville Turnpike
Riverhead, NY 11901

Regina T. Gorney

Molloy College
1000 Hempstead Ave
P O Box 5002
Rockville Centre, NY 11571-5002

Joe Grignoli

Welcoming Home Our Heroes
1229 Old Walt Whitman Road
Melville, NY 11747

Dawn Grzan

Farmingdale State College
2350 Broadhollow Road
Farmingdale, NY 11735

Nancy Hager

130 Araca Road
Babylon, NY 11702

Thomas Kissane

CCS
461 Fifth Avenue 3rd Floor
New York, NY 10017

Cynthia Loveman, CFRE

PO Box 155
Great River, NY 11739

Laura Majersky

45 E Piave Terrace
Lindenhurst, NY 11757

Christine McCauley

Development Disabilities Institute
99 Hollywood Drive
Smithtown, NY 11787

Catherine Oberg

The Plaza Cinema &
Media Arts Center
127 South Dunton Avenue
East Patchogue, NY 11772

Robert Olsen, Jr.

Webb Institute
298 Crescent Beach Road
Glen Cove, NY 11542

Vincent Santo

4 Fern Place
Plainview, NY 11803

Elizabeth Schumacher

Treasure Coast CEO, Inc.
P O Box 440
Speonk, NY 11972

Stan Sheppard

North Shore Child & Family
Guidance Center
480 Old Westbury Road
Roslyn Heights, NY 11577-2215

Alesia Soltanpanah

19 Nixon Street
Farmingville, NY 11738

Sharon Udolf

245-30 Grand Central Parkway
Apt 6M
Bellerose, NY 11426

Christopher Williams

Long Island University
700 Northern Boulevard
Brookville, NY 11548-1327

Wingson Wong

152 Rim Lane
Hicksville, NY 11801



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Please register in advance for monthly meetings!

Doing the Right Thing: Ethical Issues in Fundraising

By Marsha Gittleman and Marc Suntutp

By virtue of our membership in AFP we each make a commitment to subscribe to an ethical code of conduct and fundraising practice. In most cases, this is easy to accomplish by simply "doing the right thing" and adhering to the AFP Donor Bill of Rights. Occasionally, however, we all face challenges, or "gray areas," beyond honoring our donors'

wishes, informing and acknowledging them as appropriate and staying true to our organization's mission.

This recurring column will address some of these situations, and welcomes questions posed by our readers.

Is There Such a Thing as Too Much Money?

The Scenario: Your organization initiates a campaign to raise funds for a specific project. Being a competent professional, you create and implement a plan that includes a description of how the dollars raised (CONTINUED ON PAGE 6)

Dionne Walker-Belgrave



Organization: DWB Associates Diversity Consultants

Title: CEO

Number of years at your present organization? 7

Number of years in the not for profit community? 20+ plus years of service within the various not-for-profit community.

How and why did you get into this line of work? I have always enjoyed serving as an advocate for worthy causes. At a very young age I began working with my local civic organization and the church.

What do you find most rewarding about working in not-for-profit? The fulfillment of being able to serve as an advocate and in some shape or form being able to utilize my administrative skills to give back to others.

You are working with the AFPLI Board this year. What are your top goals in working with the Board? My top goals are to assist the organization in its efforts to address the current trends and developments within the fundraising profession. I would also like to provide guidance as to how to address the current expansion of practitioner responsibilities within the field.

How do you see these goals getting accomplished? The above goals can be accomplished through the evaluation of the current growth within the sector, expansion of donor demographics, inter-generational transfer of wealth, technological advancements, regulation changes and any external scrutiny that may exist. Conducting an analysis of these areas will allow the organization to establish and implement a successful strategic plan which will result in the accomplishment of the organization's goals.

In your opinion, what are the top issues facing LI today? Based on the 2010 Census data and given the most recent shift in the demographic population on Long Island, there appears to be an urgent call for global and organizational diversification. Properly incorporated diversification will ultimately assist in the reversal of our current economic downturn and the revitalization of growth within all organizations.

What role do you see AFPLI playing in those issues? I see AFPLI as serving in a leadership role within the not-for-profit arena as it continues to move towards answering the call of diversification [in taking action to further enhance their organizational diversity]. As a result, AFPLI will continue to grow, to service its members and the surrounding communities, while keeping pace with the current shifting context.

Do you have a mentor/influencer? If so, who is it and how has that person made a difference in your life? My father, the late Isaiah Walker, and mother, Ellen M. Walker, have served as my mentors and influencers throughout my career. They've provided me with continued wisdom and assistance to stay grounded. Each time I reflect back on their life-long careers as nurses and how dedicated they were in providing service throughout the community, my desire to continue incorporating advocacy within my life plan grows.

Describe yourself in three words. Competent, Cognizant, Encouraging

Do you have a favorite quote or saying that you live by? If so, would you share it with our readership? I always look at the glass as half full which inspires continued growth in all facets of my life.

What are you reading now? The Help, by Kathryn Stockett

A Whip and a Chair: Working with Your Board of Directors

By Charles D. Kimpel, CFRE

In the first article we talked about the Board's composition and what development officers need to know about the characteristics of board members. Today we will introduce the three duties of a board member of a not-for-profit organization (NPO). New York State recognizes board members as the persons responsible for the welfare of the organization, and imposes on them three generally recognized duties: The duty of care, the duty of loyalty and the duty of obedience. I want to acknowledge Tom Killeen, partner at the law firm Farrell Fritz, for the concise definitions below. The translations are those of the author.

The Duty of Care

The Duty of Care is generally used to define the level of performance required of a director in performing management functions. In New York, the Not-for-Profit Corporation Law stipulates that directors and officers must act "in good faith and with that degree of diligence, care and skill which ordinarily prudent men would exercise..." In analyzing whether a director is complying with the duty of care, the analysis should not relate to the outcome of the director's decision, but rather the process involved in the director having reached that decision.

Translation: Make the right decisions for the right reasons and keep good minutes of committee and board meetings to show how decisions were reached.

The Duty of Loyalty

The Duty of Loyalty calls for a higher standard than the duty of care. Under this standard the director must have an

undivided loyalty to the organization and its mission, and is prohibited from using his or her position for private gain.

Translation: Board members should make gifts to the organization proportionate to their means, even to the exclusion of other organizations. If board members do not support an organization to the best of their ability, why are they on the Board? How can they ask others to give if they do not show their support? The second part is self-evident.

The Duty of Obedience

The Duty of Obedience relates to the director's obligation to carry out the purposes of the NPO which he/she serves. The Board has the primary responsibility for insuring the activities of the organization relate to its mission.

Translation: Unless the original charter is changed by court order, the Board must adhere to the original mission. This precludes "mission creep" and activities not in keeping with the original mission, such as adding programs just because they might generate financial support.

It is likely your board members are not aware of these responsibilities, so share this information with your Chief Executive, and make a plan for introducing it to the Board.



Charles Kimpel is Senior Partner at Philanthropic Consulting Service, the firm he founded in 1995. Previous positions include Chief Development Officer for a Manhattan hospital and President and CEO of a national health agency.

Doing the Right Thing

(CONTINUED FROM PAGE 4)

will be used. Being a VERY competent professional, you raise more money than the project requires. What would you do (besides pop the champagne)?

Our Answer: We should all be so lucky to have this problem in these current economic times.

In this case, the heart of the issue relates to "donor intent". As development professionals it is our responsibility to honor the intent of the donor by making sure that their gift is used for the project, program or purpose for which the gift was made.

If funds secured in a specific campaign exceed the goal there are multiple options to meet the ethical standards of "donor intent". The project scope can be expanded to encompass the increased revenue available. Or, with donor approval, funds can be established for the purpose of

endowment making additional resources available for future use. Another strategy can be to ask the donor to "unrestrict" these funds for similar use, but not project specific. The final choice is to offer the donor the option of receiving the funds back. But, with effective relationship building, mission driven discussion and presentation of other thoughtful funding opportunities, the donor will rarely choose such a path.

Good luck in your campaign!

We encourage you to review all legal and tax matters with your organization's counsel. Email your questions/scenarios or feedback for "Do the Right Thing" to mgittleman@ucp-suffolk.org or msuntup@gurwin.org.



Marsha Gittleman is Director of Development at UCP of Greater Suffolk.

Marc Suntup is Chief Development Officer at Gurwin Jewish Healthcare Foundation.



Garrote and other chapter members recruited a committee of community leaders on Long Island representing not only people of different races and cultures, but also different ages, backgrounds and religions. They included seasoned nonprofit professionals and people new to the field. They also looked for leaders and representatives who served groups in the area, such as the Suffolk County director of minority affairs, the president of the New York State Social Workers Association and the Suffolk County director of handicapped services – people with clear and direct ties to the communities they wanted to reach.

Once Garrote and her colleagues had assembled a committee of 16 community members – most of whom were not members of AFP – they began asking questions. Are you familiar with the profession of fundraising? Have you heard of AFP? Why don't you feel connected to AFP or the profession? The questions were designed to get to the bottom of a lingering and nagging question in their chapter: Where is the diversity?

"When we first met in 2008, we didn't have game plan to go on," Garrote recalls. "It was all pioneering on our part. I didn't know any more than anyone else did about how to advance diversity in our chapter. This time we assembled an amazing group of people and let the committee come up with the ideas."

Once the committee came together and began discussing how to better engage diverse people to become members of the chapter, things started to take flight. "We had great conversations," Garrote says. "I got a lot out of it, and I truly believe each and every one of them did as well."

The conversations gave way to networking socials for fundraising and development professionals. The networking socials, in turn, served as outreach and information events for the chapter. Community leaders on the diversity committee, who had been recruited themselves, in turn recruited their colleagues and friends in development to attend the events, which broadened the conversation even more. "See familiar faces and meet new ones," read the chapter fliers posted around the community. And that is exactly what happened.

Careful to let the conversation about the value of chapter membership come naturally, the diversity committee set up a table off to the side of the room at the networking meetings and explained the chapter's programs and benefits only when people asked. Three-quarters of the fundraisers in the room did not even know that the organization – AFP or its local chapter – existed, Garrote says. Gradually the participants from the community got to know the chapter volunteers and became interested in what AFP had to offer.

The community is now much more aware of the chapter and what it offers. The chapter demographics are changing, and the board is happy with the increasingly diverse membership. Best of all, Garrote admits, the process was so much fun. "Diversity is not just having diverse people. It's

AFP NY, Long Island Chapter's Strategic Plan to Achieve Diversity

The overall goal: To implement a plan that ensures that diversity will be including in all chapter operations.

Objectives and/or tasks:

1. The diversity committee will establish a mission statement and seek approval by the board of directors.
2. The committee chair will recruit members from a diverse group of community leaders to serve on the diversity committee. These leaders may be in fundraising and may be members of organizations that serve and/or comprise a diverse membership community. In addition, the committee will begin to establish a database of individuals and organizations that work around issues of diversity and inclusion.
3. The diversity committee should include members from other active committees of the board of directors to ensure diversity is included in all aspects of the chapter. The diversity committee, in conjunction with the chapter, should conduct an annual self-assessment to determine the current status of its diversity efforts and to formulate a future strategic plan, including the following points:
 - Review the chapter's membership, including the board and committees, to ensure that the community the chapter serves is well represented.
 - Review the chapter's activities to ensure the chapter includes underrepresented populations.
 - Review the location of monthly chapter workshops, content of programs, variety of speakers and funds earmarked for diversity programs.
4. Offer membership and/or partial or full scholarships to attend educational events to people from diverse backgrounds.
5. Promote growth and participation of diverse and inclusive leadership at the board and committee levels.
6. Reach out to community groups for collaboration and exchange of information to facilitate recruitment and combined programming.
7. Develop an annual article on diversity for the chapter newsletter and a bimonthly article on a variety of fundraising and diverse topics.
8. Establish a diversity track at the chapter's Philanthropy Day conference.

knowing that each group has its own nuances," she says. Yet, as diverse as each group is, we all share so much that is the same."

John Skendall is a public affairs specialist at the Association of Fundraising Professionals (AFP) in Arlington, VA., jskendall@afpnet.org

Calendar

NOVEMBER						
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FEBRUARY						
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MARCH						
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29	30	31				

For further information and reservations please call the AFPLI office 631/249-5008.

- November**
 - 1 5:30 PM Mentoring Express
 - 4 8:00 AM AFPLI Board Meeting
 - 18 ALL DAY **Philanthropy Day on Long Island**
 - 22 6:30 PM "Special Events & Sponsorships" Course begins
- December**
 - 2 8:00 AM AFPLI Board Meeting
 - 13 8:00 AM Professional Education Meeting "Stewardship"
- January**
 - 5 5:00 PM "Building an Outstanding Volunteer Program" Course begins
 - 11 6:00 PM "Your Career in Development and Fundraising"
 - 25 6:00 PM "The Business of Raising Money for the Non-Profit Sector" Course begins
- February**
 - 7 6:30 PM "Establishing & Managing a Planned Giving Program" Course begins
 - 9 6:30 PM "Positioning Your Organization Through Marketing & Public Relations" Course begins
- March**
 - 20 6:30 PM "Building the Ultimate Board of Directors" Course begins
 - 22 6:30 PM "The Art & Skills of the Grant Process" Course begins

Due to rising costs, the reservation and cancellation policies for monthly educational meetings will be strictly enforced. Cancellations received after the cut-off date cannot be credited or carried over. If you make a reservation and don't show, you will be billed, since guarantees to the hotel must be met. Please help us maintain monthly meeting costs.

AFPLI

V O I C E

Association of Fundraising Professionals —
Long Island Chapter
110 Schmitt Boulevard
Farmingdale, NY 11735

631/249-5008
631/249-5010 Fax
www.afpli.org

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