

31<sup>st</sup> Annual  
Registered Rep.  
Altruism Awards

Rep.

# Advisors With HEART

If you need a little distraction from the daily headlines, a little something to inspire you to keep pushing yourself to reach a personal best, you may find it here in our 31st annual Altruism Awards. Not only are these advisors at the top of their game professionally, they find the time and the energy to make substantial commitments to causes they care about, both locally and globally.

Every year, *Registered Rep.* receives dozens of nomination letters from all types of advisors across the country for our annual award (previously entitled The Outstanding Advisor Awards.) Paring the pile down to 10 is never an easy task. However, reading about the high esteem in which colleagues and clients hold our many nominees is evidence that good often prevails over greed in the world of financial services. Indeed, amid all of the recent negative news reports about Wall Street insider trading and other ethical lapses in financial services, it's a great time for a reminder of just how many honest, giving and successful people work in this business.

This year, like most, our selected winners are all over the map in terms of the causes they champion and the methods they use to support those causes. But many of them are very hands-on, whether they work with the world's neediest directly, hand-select and deliver supplies, or commit themselves to intense athletic events for fundraising. These advisors want to have a direct and tangible impact on the world. For example, David Rae cycles in a 7-day race and recruits others to the ride to combat AIDS in Los Angeles; Steven Tonkinson travels to communities in places like Haiti to help them rebuild after natural disasters have struck; Joe Callahan serves food to the homeless and mentors a recovering drug addict in Cincinnati; Patricia Estopinal raises funds for, buys and delivers the supplies for dozens of full Thanksgiving meals to shelters in Sacramento.

All 10 of this year's award winners serve to remind us not only of the human capacity for improving our world, but also to illuminate the creative methods we use to help one another. It's not surprising that financial advisors can be found leading these kinds of efforts. As one of our Advisors With Heart, George Cook says, "I'm not just here to make money to live a big lifestyle. We are entrusted with these resources and have a responsibility to be a steward. It's not hard to take a look around the world and see that there are people less fortunate."

So, turn the page and read about this year's 10 winners. You'll come away inspired.

## David Rae

### Racing Against AIDS

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**Firm:** Trilogy Financial Services,  
National Planning Corp.

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**City:** Los Angeles, CA

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**Financial advisor** David Rae started riding in the AIDS Life/Cycle race just four years ago, and he has since gotten heavily involved in recruiting and fund-raising for the event. The seven-day race, which raised \$11 million last year for Los Angeles-area HIV and AIDS support, takes cyclists from San Francisco to Los Angeles along a 545-mile scenic coastal route in early June. This year the ride turns 10, and 2,500 riders are signed up, while another 500 will come out to support them. "It's a moving city. There are tents and food. It's like adult summer camp," says Rae with a laugh.

Rae, who is 33, more than doubled the number of recruits he brought to the race this year to 70 riders. He has personally raised \$10,000 each year for the race, making him one of the event's top donors. He also captains a team of 70 riders, named Team Popular (after the musical *Wicked*, he says), which was the top fundraising team last year and is on track to be the top team again in 2011.

Rae's work does not stop when the race ends. He has also been on the ambassador council for AIDS Project LA for the past three years, which helps people living with AIDS in Los Angeles through fundraising and public awareness campaigns. In addition,

over the past five years Rae has been on the board of Labor Day Los Angeles, which picks three causes to support every year, typically fatal diseases and thorny social issues that result in discrimination, like AIDS, cancer, homeless youth and gay marriage.

Rae got started helping with AIDS organizations in a minor way in college, writing small checks. A mentor encouraged him to get more involved. "Now that I have more means and a social network, I can give a lot more back with a much better result," he says.

For Rae, among the highlights of his philanthropic work are the semi-annual fundraising parties he throws in his own home, a large house that can accommodate 500 people right off of busy Melrose Avenue in West Hollywood. He hires a DJ, gets an alcohol sponsor, and requests a donation at the door. The parties attract an eclectic mix of people, who spill out onto the front and back lawns, he says. "His outgoing personality and large social network allow him to host major fundraisers and help make sure they are a success, well attended and that everyone has a wonderful time," says Ryne Meadors, formerly a team coordinator for California AIDS walk. Rae puts the "fun" in fundraising. —*Kristen French*

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