

Impact



Josephine and E. Herbert Burk

Josephine and E. Herbert Burk grew up on farms in rural Simsbury, Connecticut and met in the town's one-room school house. Utterly devoted to each other and their family, they were married for nearly seventy years.

Mr. Burk started as a bench machinist in 1944, then worked almost forty years for Mestek of Westfield (formerly Sterling Radiator), retiring as senior vice president and director in 1987. He managed his own finances until the end of his life when he started working with US Trust, Bank of America trust officer, Debra Purrington. "He was emphatic about putting plans in place so that Mrs. Burk would never worry about her financial security," recalls Debra. "He postponed making any charitable gifts during his lifetime, insisting the choice be up to Mrs. Burk."

Mrs. Burk's family, gardening and gracious hospitality were the hallmarks of her life. She did not have extensive experience making major financial decisions, when, at the age of 88, she was thrust into the decision of a lifetime. According to the Burks' attorney,

Generous Lives, Lasting Gifts

Chip Doherty, “She wanted to give away \$3 million during her lifetime, and we encouraged her to complete these gifts in 2006 for tax reasons. While we knew the Community Foundation would be a good vehicle to make gifts like this, we were concerned that the decision might be overwhelming for Mrs. Burk.” After three sleepless nights, Mrs. Burk made her decision. She chose three institutions important to her and her family, reflecting their interests and values.

Mrs. Burk and her advisors looked to the Foundation for assistance because it is designed to make complex giving easy. Not only was Mrs. Burk able to make one gift to benefit multiple recipients, each with different terms and all with aspects to be managed in perpetuity, she also was able to use an illiquid asset—privately held stock—to fund her family’s marvelous legacy.



Paul Schmittacher

With the help of Foundation President, Kent Faerber, attorneys Liz Sillin and Chip Doherty, and attorney/trust officer Debra Purrington, Mrs. Josephine Burk of Westfield established three funds with an extraordinary \$3 million gift: a fund to provide much needed financial resources to the Westfield Athenaeum; a fund to establish Noble Hospital’s new digital mammography center; and another to provide the Regional Employment Board with funding to encourage and develop precision machining skills. (From left to right, Purrington, Sillin, Doherty, and Faerber.)