

George S. Ladd Memorial Fund

W. E. Helbling Fund

October 2017

Background of the Ladd-Helbling Fund:

The Ladd-Helbling Fund was initially established in memory of George S. Ladd, the first president of Pacific Telephone and Telegraph, who died in 1889. His will designated funds be set aside to establish a hospital for telephone company employees in need. Since there were funds to build the hospital but not to staff it they were invested until a remedy could be found. Eventually Mr. Ladd's widow, Mrs. Elizabeth Patterson (Ladd) Mitchell, and the trustees were able to establish a fund to help Pacific Telephone retirees who experienced significant financial needs.

The fund grew through the years expanding with the addition of the estate of retired Pacific Telephone and Telegraph/Telesis employee W.E. (Bill) Helbling who passed away in 1988.

The purpose of the Ladd-Helbling Fund is to generally provide one-time assistance for extraordinary expenses or **Disaster Assistance ***; or to provide temporary stipends to supplement a retiree's basic income in times of need. It is open to all Pacific Telephone retirees who are Disability or Service Pension eligible. Applications and directions may be requested at the address noted below. *{Note: A retiree does not need to be a member of the Telephone Pioneers; and does not have to live in California to apply.}*

Applications should be accompanied by a short letter clearly stating the reason for requesting financial assistance and a full disclosure of all financial resources and liabilities.

Please contact Pat Schwafel, the administrative manager of the fund, who will be glad to assist you with any questions you might have.

Pat Schwafel

Administrative Manager

The Ladd-Helbling Fund

P.O. Box 1046

Benicia, CA 94510

707-643-6692

ladd-helbling@sbcglobal.net

NOTE *...

Disaster grants are given to help retirees who have suffered losses after calamities such as earthquake/fire/floods. We provide emergency relief funds as follows:

- \$3500 for retiree only
- \$5000 to two people (*retiree plus one*)
- \$7500 for three people (*retiree plus two...*)
 - The additional folks living with the retiree need to be a qualified dependent...spouse (*or partner*) ...child (*disabled and unable to work if over 18*)...grandchild etc.

DISASTER NAME: _____ Date of Disaster: _____

*Disaster Assistance ~ **For retired Pacific Bell Companies/Nevada Bell/
Pacific Northwest Bell Employees***

Retiree Name (Full name including MI): _____

NCS Date: _____ Date of Retirement: _____

Social Security No. _____ Birthdate: _____

Home Address: _____

Mailing Address: _____

Telephone No. _____ Alternate contact No/Name: _____

Name and relationship of household members:

Brief description of damage (house & property)/conditions of your residence (*Please submit invoices/estimates/photos...something to verify your request for assistance*):

Own Home: Rent:

Brief description of current living arrangements:

SIGNATURE

For Ladd/Helbling Use Only

Comments:

Reviewed:

Committee Action:

Recommendation/Approval

Date