

CERTIFIED FINANCIAL PLANNER™ RICK TONKINSON MAKES A BEQUEST OF HIS OWN

With over 25 years of experience in wealth management, Rick Tonkinson understands planned giving. He is the president of Tonkinson Financial, a family business that provides a common-sense, realistic and encouraging approach to the financial issues of his clients, who come from middle class families with less than \$1 million in assets. Rick has continued to demonstrate his business savvy, kindness and passion for the Diabetes Research Institute. Recently, he established a \$1 million bequest to benefit the DRI. But as Rick says, **“You don’t need 25 years of experience to make a planned gift. Virtually anyone can make one.”**

Rick learned the value of a dollar delivering newspapers for *Newsday* in Long Island at the age of 12. He credits his spirit of community and giving back to his New York upbringing and his mother as a role model. Rick says his mother was the biggest influence in his life and, although she passed away in 1974, people still remember her kindness.

Determined to live up to the virtues of his mother, Rick joined the Peace Corps after graduating from Pennsylvania State University. While volunteering with the Peace Corps in Colombia he met his wife, **Margarita**, who was a high-level executive in Colombia’s port author-

ity. In 1981, Rick and Margarita moved to Miami with their son, **Steven**. Since then, Rick has made a huge impact on the South Florida community. In addition to being a member of the DRI Foundation’s Florida Region Board, Rick is a major donor to 30 charities in the local community. He serves as chairman of the FIU College of Architecture and the Arts Advisory Board as well as a board member at the Arsht Performing Arts Center and trustee to the Cleveland Orchestra. Rick is committed to tithing 10 percent of his gross income to the community.

Although Rick is passionate about all the organizations he supports, the DRI in particular is a top priority for him. “I am convinced that researchers at the DRI will find a cure for diabetes,” he said. “And once they get a grip on the source, other related illnesses can also be cured.” Rick says the DRI’s transparency and collaborative relationships with researchers around the world allow him to sleep well at night, knowing his funds are going to the right place. Recognizing the DRI’s need for immediate funding, Rick and Margarita also have recently made a \$150,000 contribution that will elevate them to the DRIF’s Distinguished Humanitarians giving society, which honors those whose cumulative contributions range from \$250,000 to \$499,999.

Rick discovered he had diabetes at 51, just six months after climbing Mt. Kilimanjaro with his son, **Steven**. He thanks **Dean Pascal Goldschmidt** for referring him to the DRI when he was tired of the status quo and searching for an organization with a comprehensive approach to combatting diabetes. Rick’s diabetes was out of control when he first began treatment at the DRI. He credits **Dr. Alessia Fornoni** for finding a life-saving link between his kidney disease and diabetes, the team of **Dr. Bresta Miranda-Palma** and **Allison Wick** for communicating with him regularly to help him successfully manage his blood glucose levels, and **Dr. Juan Dominguez-Bendala** for being his health conscience. Rick says, **“We talk a lot about the DRI family, and I truly believe in it. I am willing to give not only for analytical reasons but for the emotional connection I have with everyone involved, including the magnificent staff.”**

Motivated by his fellow board members and their long-time commitments, Rick pledges to be even more generous as he becomes more prosperous. He invites everyone to join him in supporting the DRI as we advance toward a cure. For tips from Rick about making planned gifts, please see our Q&A with him on page 8.



Margarita and Rick Tonkinson receiving a Cycle of Discovery award; see page 6 to learn more about this award series.