

FOR **GOOD.** FOR **EVER.**[®]

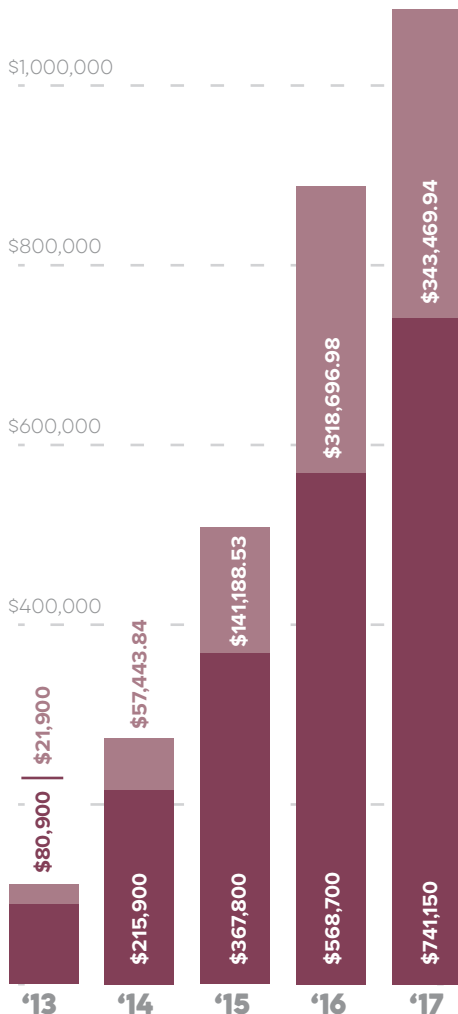
WINTER 2017

IMPACT



GIVING CIRCLES GENERATE MORE THAN \$1 MILLION SINCE 2013!

ENDOWED ASSETS
CUMULATIVELY AWARDED



What a difference a group of individuals can make! In just five years, our five Giving Circles will have awarded nearly \$750,000 and endowed over \$340,000 to local programs and organizations benefiting citizens in Clay, Sullivan and Vigo counties. That is three quarters of one million dollars distributed by local individuals pledging \$100 per quarter to help make a difference in their communities!

The concept is as simple as it is powerful. Each year, members of these groups agree to donate \$500 annually – \$100 into an endowment in the Wabash Valley Community Foundation as well as \$100 per quarter to a selected nonprofit organization. The members meet four times per year to nominate, advocate for and vote for a local nonprofit organization to collectively support.

Our Giving Circles, 100 Women Who Care and Guys Who Give, make philanthropy easy for people who are at different stages of their careers, income levels and lives by pooling together resources to make a significant impact. The power of giving together toward a common goal enables group members to do more with less while learning more about the charitable organizations that serve the Wabash Valley.

“Giving Circles provide individuals the opportunity to connect with others who share a common interest in addressing opportunities within the community,” said Emily Murray, Affiliate Relations Coordinator for the Wabash Valley Community Foundation. “Joining a Giving Circle is an excellent way to meet new people, learn more about community organizations and identify projects or programs in need of assistance.”

Now is the perfect time to join one of our giving circles or renew your membership for 2018! You can easily join or renew by completing an online membership form at <http://wvcf.com/giving-circles/> or by completing the Information Sheet on Page 4 and mailing to:

Wabash Valley Community Foundation
200 South 8th Street
Terre Haute, Indiana 47807

To learn more about the Giving Circles administered by the Wabash Valley Community Foundation, visit our website listed above or contact Emily Murray at 812.232.2234, Ext. 105. We look forward to having you join the hundreds of individuals who have worked together to maximize the impact of their charitable dollars!

CALENDAR OF EVENTS

DECEMBER 2017

- 1** **Holiday Coffee and Sock Drive** 8AM - 12PM
- 12** **Guys Who Give**
Clay County
- 13** **100+ Women Who Care**
Clay County
- 31** **Last Day to Make Your Year-End Gift!**

FEBRUARY 2018

- 1** **Catherine Elizabeth Grimes Memorial Scholarship**
Applications Due
- 8** **100+ Women Who Care**
Vigo County
- 21** **100 Women Who Care**
Sullivan County

MARCH 2018

- 13** **Guys Who Give**
Clay County
- 14** **100+ Women Who Care**
Clay County
- 16** **Youth Grant Committee**
New Member Applications Due
- 21** **Guys Who Give**
Vigo County

MAY 2018

- 1** **Grant Letters of Intent Due**
Clay, Sullivan and Vigo County
- 3** **Spring Golf Outing**
- 3** **100+ Women Who Care**
Vigo County
- 16** **100 Women Who Care**
Sullivan County

JUNE 2018

- 12** **Guys Who Give**
Clay County
- 13** **100+ Women Who Care**
Clay County
- 20** **Guys Who Give**
Vigo County

COMMUNITY FOUNDATION AND AFFILIATES WELCOME NEW BOARD MEMBERS

We celebrated a successful 25th year at our Annual Meeting on September 27, as new board members for the Clay, Sullivan and Wabash Valley boards were elected.

Joining the Wabash Valley Community Foundation board are Santhana Naidu, Associate Vice President of Marketing & Communications at Indiana State University, and Sally Zuel, Vice President, Human Resources at Union Hospital. H. Michael Lawson, retired CEO at Riddell National Bank in Brazil, will serve the second year of his two-year term as president of the Wabash Valley Community Foundation Board.

Elected to the Clay County Community Foundation board is Theresa Cooksey, co-owner at Auto - ER in Brazil. Larry Tempel will serve the first year of his second two-year term as President.

The Sullivan County Community Foundation welcomed three new members which include Kaylan Dupre, pharmacy manager for CVS Pharmacy in Linton, Bruce Marheine, partner of Wildlife Land & Resource Management in Sullivan, and Susan Norris, licensed Life and Health Agent with Springer Insurance & Financial Services, Inc. in Sullivan. Judy Harris will complete her second year of a two-year term as president of the board.



Pictured Left to Right: David Doti, Treasurer; Cindy Cox, Secretary; H. Mike Lawson, President; and Nancy Rogers, Vice-President

We would also like to express our thanks by recognizing our outgoing volunteer board members who have recently finished their terms of service with the Wabash Valley Community Foundation and its affiliates. Through their varied roles, these individuals have contributed immensely to the success of our organization, helping to advance philanthropy across our service areas.

Retiring Members include: Wabash Valley- Greg Gibson and David Piker; Clay County- Michelle Ball, Carolyn Keiser and Renee Stewart; and Sullivan County- Clay Arnett, Bob McCammon and Nancy Tomey.

Thank you to our volunteer board members for your past and continued service to the Wabash Valley!



YOU'RE INVITED

You are invited to the Community Foundation's Holiday Coffee and Sock Drive on Friday, December 1 from 8:00 AM to 12:00 PM at 200 South 8th Street! We ask that you bring one or more new pairs of child or adult socks to be donated within Clay, Sullivan and Vigo counties. Our goal is 500 pairs of socks! Help us help warm the feet of those in need while sharing a cup of holiday coffee!

**PLEASE VISIT
WVCF.COM/HOLIDAYCOFFEE2017
FOR MORE DETAILS.**

STRATEGIC PLAN UPDATE

In 2016, the Community Foundation began the process to create a new strategic plan. Based upon input from donors, grantees, volunteers, community representatives and other stakeholders, the Board of the Community Foundation identified five areas of focus. They are:

1. Board Development
2. Collaborative Impact Project
3. Communication and Awareness
4. Fundraising and Asset Development
5. Staff Development

Work has already begun on implementing this plan.

We are pleased to share our plan! Please visit wvcf.com/strategicplan to view our 2017-2019 Strategic Plan. For questions on our strategic planning process, please contact Beth Tevlin at **812.232.2234**.

FIVE THINGS TO REMEMBER (AS DECEMBER 31 DRAWS NEAR)

The end of the year will soon be here. To help you finish up this year in charitable style, here are five helpful reminders.

1 Charitable giving to the Wabash Valley Community Foundation can benefit you, as well as residents of the Wabash Valley.
A special, year-end gift during "The Season of Giving" can help you fulfill your charitable goals, and you will enjoy knowing that your generosity will make a difference in the Wabash Valley now and for years to come. And, of course, there are usually tax benefits related to charitable giving.

2 Appreciated assets make wonderful gifts!
If you have owned stock for at least one year and one day, you can receive full value for the gift, including all the appreciation if you donate to a charitable organization. What's more, you will not have to pay capital gains tax on the gift. The more the stock has appreciated, the greater the benefit! Your tax advisor can spell out the specifics for you. Mutual funds, real estate and other appreciated assets make great gifts, as well.

3 Non-cash gifts require advanced action.
A stock gift usually takes more time to complete than writing out and mailing a check. Real estate gifts require even more time. You should plan for time to discuss your non-cash gift with your attorney or financial advisor. Getting appointments and handling the paperwork takes time. So... start early!

4 Charitable gifts can be accelerated.
That is, you can reach into next year and pull your charitable giving into the current year. Why do this?

You may be looking at a higher tax bill this year, due to larger-than-anticipated income. Additional giving this year may create a higher charitable income tax deduction and help ease your added tax burden.

Or, you may want to give more this year simply because you are sure of the tax benefits now, but unsure what Congress may do next year regarding the charitable income tax deduction. After all, who knows what a year can hold?

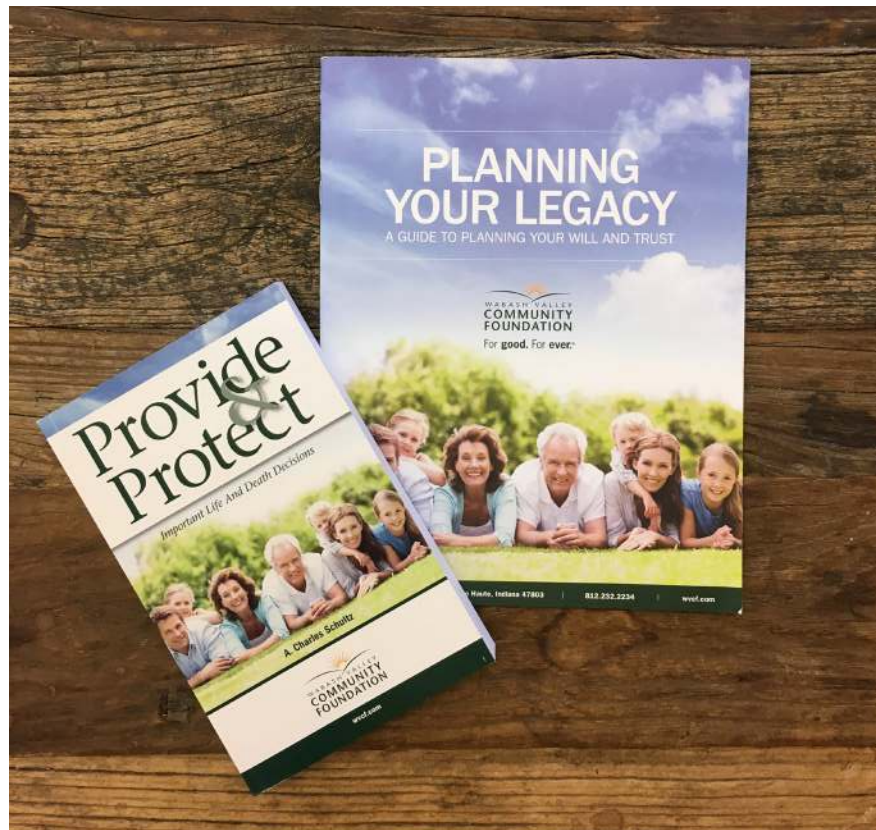
5 A life-income plan may make sense for you at this time.
These deferred giving plans allow you to establish a gift arrangement now, obtain current tax benefits, create a stream of lifetime income and provide a future gift to the Community Foundation. They are especially attractive to donors who cannot afford to give up current income from retirement-related assets.

If you would like to discuss your year-end gift options, please give us a call at **812.232.2234**. We would be happy to help you create the perfect year-end gift to benefit your community!

OUR YEAR END GIFT TO YOU



Most everyone knows, or should know, the importance of having a will. Though it lies mostly dormant, your will is an important document that, upon death, ensures your wishes are followed and your assets are distributed in the manner you intend. It also addresses issues such as who you would like named as guardian of dependent children, who should manage your estate and how you would like your assets distributed amongst loved ones and charitable organizations. Unfortunately, regardless of its importance, an astonishing nearly 70% of adults do not have a will. Many tend to put it off because it all seems too complicated or too morbid, citing that it is much easier to think about getting around to it at a later date.



To help assist you with creating your will and estate plans, the Wabash Valley Community Foundation is pleased to provide complimentary copies of *Planning Your Legacy: A Guide to Planning Your Will and Trust* and its accompaniment, *Provide & Protect: Important Life and Death Decisions*.

These tools will help simplify the process of establishing a will by helping you understand the questions you will need to address and the information you will need to gather before meeting with your attorney, who will prepare the actual documents. Your conversation with your attorney should go more smoothly and efficiently if you review the book and complete the guide prior to your initial meeting. The guide also offers a variety of options in which you can include your favorite charitable organizations or causes in your will.

We hope you will take advantage of this opportunity by contacting the Community Foundation at 812.232.2234 to request your copies. You may also stop by our offices at 200 South 8th Street in Terre Haute or request your copies by filling out and mailing the attached form on the right. >

MAKE YOUR YEAR END GIFT NOW!

NAME(S)

ADDRESS

CITY

STATE

ZIP CODE

TELEPHONE

EMAIL

This contribution is:

- in honor of in memory of
 as a holiday gift

NAME(S)

Please notify:

NAME(S)

ADDRESS

CITY

STATE

ZIP CODE

Enclosed is my contribution of:

- \$2,500 \$100
 \$1,000 \$50
 \$500 \$25
 \$250
 Other _____
 \$5,000 to establish a new
Unrestricted Endowment Fund
named:

This contribution is to support:

- Clay County
 Sullivan County
 Vigo County
 An existing fund:

NAME OF FUND

Please send me information about:

- making a gift of stock, real estate,
or other non-cash item
 making a gift from my IRA
 creating a fund
 joining a Giving Circle
 receiving a copy of the
Will Planning Guide
 receiving a copy of
Provide & Protect: Important Life
and Death Decisions

**Please send this form
and your contribution to:**

Wabash Valley Community Foundation
200 South 8th Street
Terre Haute, IN 47807

MEMORIAL CONTRIBUTIONS

AUGUST 1 - OCTOBER 31, 2017

GARY ALEXANDER
Sullivan High School Class of 1964

ROGER ALLEN
Sullivan High School Class of 1964

WILLIAM BABCOCK
Nancy Brentlinger

NINA BOGARD
Sullivan High School Class of 1973

DAN BRADBURY
Mr. & Mrs. Mark VanMeter

DR. JAMES W. CARTY
Sullivan High School Class of 1954

PAUL EUGENE CHAPELL
Mr. & Mrs. Gary W. Schomer

KELLY CHARLIER
Fred & Nancy Nation

DONALD L. CLIFFORD
Ms. Mary Louise Bell

TED COCHRAN
Denise & John Bell

GRACE E. CONAWAY
Mr. & Mrs. Gary W. Schomer

WILLIAM F. "FRED" DECKER
Wright, Shagley & Lowery, PC

VIRGINIA R. DRAGON
Wright, Shagley & Lowery, PC

PETER ANTHONY DUONG
Paul & Lynn Multari
Dr. & Mrs. Peter M. Nalin

JACK FOX
Mrs. Lori Fox

DR. GARY L. GREVEN
Wright, Shagley, & Lowery, PC

ELIZABETH "BETTY" G. GRIMES
Ms. Mary Louise Bell

CHARLES CARTER HEDRICK
Mrs. Marsha Hedrick

EMILY & RANDY HERRINGTON
Mr. & Mrs. Joseph P. Rybandt

MARY LOU JAMES
Wright, Shagley & Lowery, PC

FRANK "BILL" JERSE
Fred & Nancy Nation
Terry & Beth Tevlin

RENATE JUSTIN, MD
Sue Benstrup

DR. SUSAN M. LATTA, PH.D.
Ms. Dorothy A. Latta

JACK LOWER
Ernie Hisle

MATTHEW "MATT" C. LUECKING
Ms. Micci French

TERRY E. MAHALEK
Wright, Shagley & Lowery, PC

DR. WILLIAM G. MCCARTHY
Fred & Nancy Nation
Wright, Shagley & Lowery, PC

JIM MCCORMICK
Fred & Nancy Nation

DONALD W. MOREAU, SR.
Wright, Shagley & Lowery, PC

RONN MOTT
Terry & Beth Tevlin

CHARLES E. OSMON
Wright, Shagley & Lowery, PC

DORIS PELL
Lauren & Ryan Tevlin

DENISE MAY PETRULLO
Stephanie M. Welsh & Garrett A.
Pendergast

CINDY PORTER
Brazil High School Class of 1972
Ms. Beth Lutz
Mr. & Mrs. Paul T. Moore
Mr. Richard L. Steuerwald

LOUISE PROX
Ms. Mary Louise Bell

J. ROBERT QUATROCHE
Terry & Beth Tevlin

RACHEL MARIE ROMAS
Anonymous
Ms. Caroline Day
Derek Eck
Ms. Mary Haefele
Ms. Alexis Rusch
Shannon Shuler
Bob & Carole Stokes
Ms. Karen Truelove
Mrs. Amanda Twombly
Mrs. Katherine EC Virostko
Ms. Elizabeth Wriighthouse

JUSTIN SCOTT
Wright, Shagley & Lowery, PC

DONALD E. SMITH
Ron & Sherrill Rich
B.J. & Judi Voges

KATHY ROSS SMITH
Wright, Shagley & Lowery, PC

DR. JAMES CROWDER SPRINGER
Clinton Prairie High School Staff

DONNA SPRINGMAN
Dr. & Mrs. Dan O. Farrington DVM

CAMERON JOSEPH TAYLOR
Amy & Gavin Mann

**KIMBERLY JEANNE
FOWLER WULF**
Mrs. Jeanne Fowler

TRIBUTES

**CHARLES RUBEY'S 75TH BIRTHDAY
& RETIREMENT**
Fred & Nancy Rubey

SARAH SENSEMAN
Rachel Senseman

NEW FUNDS

Jack Fox Memorial Scholarship Fund
Dr. Susan M. Latta, Ph.D. Memorial Scholarship Fund
Rev. Willis & Virginia Ross Fund for the Sullivan County Historical Society

TAKE ADVANTAGE OF THE IRA CHARITABLE ROLLOVER!

It's easy to look forward to the New Year and its promise of new opportunities, but did you know the old year might also yield rewarding returns? As you look to 2018, perhaps consider making a few year-end decisions that will make a difference in your community. Not just for the New Year, but for many years to come.

With the remaining weeks in 2017, now is your chance to make your assets work for you as much as possible. You might consider a gift of cash or appreciated stock. If you are 70 ½ years or older, you might take advantage of the IRA Charitable Rollover and contribute any amount up to \$100,000 from your IRA account to the Wabash Valley Community Foundation. Donating your required minimum distribution (RMD) to the Community Foundation or other qualified charitable organizations ensures you will not pay taxes on the RMD.

Your gift can go a long way toward helping others. This holiday season, consider how your gift can make a difference now and for generations to come. Please give us a call at 812.232.2234 so we can be of help to you in your giving!

PLAN
FOR
**THE
YEAR
END**

If you are receiving duplicate mailings, please contact us at info@wvcf.com or at 812.232.2234.



wvcf.com

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Terre Haute, Indiana 47807



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