

FOR **GOOD.** FOR **EVER.**[®]

WINTER 2019

IMPACT



WABASH VALLEY PHILANTHROPY ALLIANCE HOSTS TRIBUTE TO PHILANTHROPY

The newly-formed Wabash Valley Philanthropy Alliance (WVPA) recently hosted a “Tribute to Philanthropy” breakfast at Clabber Girl as part of its inaugural event. Dr. Laurie Paalberg, IU Lilly School of Philanthropy, served as the keynote speaker and discussed how philanthropy has the unique ability to influence a community. With more than 50 community members in attendance, Dr. Paalberg highlighted the changing nature of community philanthropy and focused on the strategic shifts in grant making by local United Ways and community foundations.

Created to promote philanthropy in the Wabash Valley, the WVPA is comprised of nonprofit professionals, board members, volunteers and corporate philanthropists. Its initial members, Hamilton Center Foundation, Indiana State University, Ivy Tech Community College, Rose-Hulman Institute of Technology, Saint Mary-of-the-Woods College, United Way of the Wabash Valley, Vigo County Education Foundation and Wabash Valley Community Foundation, work together towards a goal of elevating knowledge of professionalism in philanthropy throughout the west central Indiana

community. **To learn more about the WVPA, please visit facebook.com/wabashvalleyphilanthropyalliance/.**



Dr. Laurie Paalberg presents during WVPA's “Tribute to Philanthropy.” Photo courtesy of Jane Nichols.

GIVING TO THE COMMUNITY FOUNDATION INCREASED BY 317% IN FISCAL YEAR 2019

Wabash Valley Community Foundation Board President Nancy Rogers announced the Community Foundation received nearly \$7 million dollars in gifts during its 2019 fiscal year, which ended on September 30. This contribution meant a 317% increase was received over the previous year.

Multiple reasons were responsible for this increase. The largest contributing

factor to this growth was the receipt of seven planned gifts, which totaled nearly \$3 million dollars. Donations to unrestricted endowment funds increased by more than 1000% over the last year. Lilly Endowment Inc.'s GIFT VII initiative to grow unrestricted endowment funds was responsible for this significant growth (See page 3 for more details). An increase was also found in the number of contributions

made to other types of funds including scholarships, designated, donor-advised and agency endowments.

In addition to the amounts received, the Community Foundation reported the number of its donors grew by 14%. Of those that gave during the Fiscal Year 2019, 31% were new donors to the Community Foundation.

CALENDAR OF EVENTS

DECEMBER 2019

- 10** **Guys Who Give**
Clay County
- 11** **100 Women Who Care**
Clay County
- 13** **Holiday Coffee**
8:00AM - Noon
- 31** **Last Day to Make Your
Year-End Gift!**

FEBRUARY 2020

- 1** **Catherine Elizabeth Grimes
Memorial Scholarship**
Applications Due
- 19** **100 Women Who Care**
Sullivan County
- 27** **100+ Women Who Care**
Vigo County

MARCH 2020

- 10** **Guys Who Give**
Clay County
- 11** **100 Women Who Care**
Clay County
- 15** **Youth Grant Committee**
New Member Applications Due
- 25** **Guys Who Give**
Vigo County

MAY 2020

- 1** **Grant Letters of Intent Due**
Clay, Sullivan and Vigo Counties
- 20** **100 Women Who Care**
Sullivan County
- 28** **100+ Women Who Care**
Vigo County

JUNE 2020

- 9** **Guys Who Give**
Clay County
- 10** **100 Women Who Care**
Clay County
- 12** **Spring Golf Outing**
Hulman Links
- 24** **Guys Who Give**
Vigo County

SMART YEAR-END GIVING!

Year-end is still a great time to give! Even if you no longer itemize for income tax purposes, below are a few smart ways to consider making your gift.

- 1** Make a gift to a new or existing unrestricted endowment fund in the Wabash Valley Community Foundation. Lilly Endowment Inc. will match your gift \$2 to \$1 – tripling the impact your gift will have!
- 2** If you are 70 ½ or older, you can make a tax transfer of up to \$100,000 from your IRA to the Community Foundation. Donors have told us they contribute their required minimum distribution (RMD) to charity so they can avoid paying income tax on it!
- 3** Transfer appreciated stock rather than writing a check. By making a contribution of appreciated stock, you can avoid paying tax on the increase in value of the stock.
- 4** Create a nonpermanent Advised Fund within the Community Foundation and frontload the newly created fund with several years of charitable deductions. You can realize the tax benefit in the year you make the gift to your Advised Fund. You can time your charitable distributions over the next several years to the charities you normally support.
- 5** Make contributions to the organizations that are meaningful to you. Studies have shown that giving and volunteering are good for your physical and mental health. Regardless of the tax impact, supporting charity is good for you and your community!

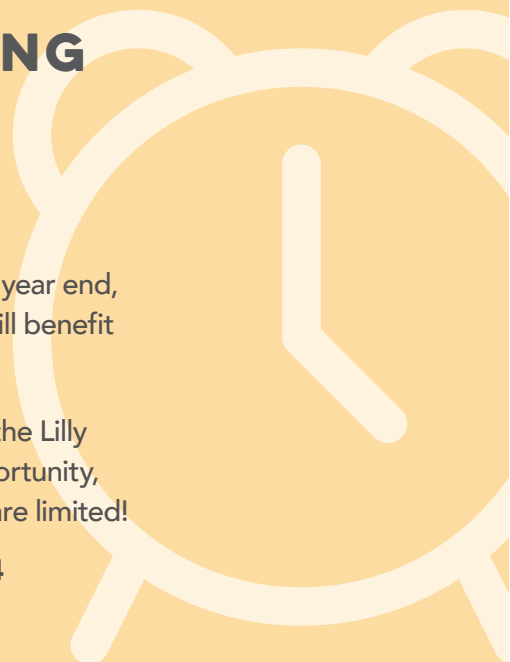
YOU'RE RUNNING OUT OF TIME!

Don't miss this opportunity!

With only a few weeks left until the year end, now is the time to give a gift that will benefit our communities and our mission.

If you plan on taking advantage of the Lilly Endowment Inc. matching gift opportunity, the time is now as matching funds are limited!

**Contact us today at 812.232.2234
to learn more.**



COMMUNITY FOUNDATION WELCOMES NEW PROGRAM ASSOCIATE

Mari Jackson joined the Community Foundation staff as the new Program Associate on November 18. She will assist in administering grants and scholarships to Clay, Sullivan and Vigo counties.

A Terre Haute native, Mari is a graduate of Terre Haute South and Saint Mary-of-the-Woods College with a degree in Psychology. "I am thrilled to have joined the Community Foundation staff and be

part of this influential team," said Mari. "The Community Foundation plays such a crucial role in the communities we serve in by providing necessary funds to improve the quality of life for families such as mine. I am looking forward to collaborating with everyone and assisting the Community Foundation in its mission!"

Mari resides in Terre Haute with her husband, son and dog.



ACT NOW TO TRIPLE YOUR IMPACT THIS HOLIDAY SEASON!

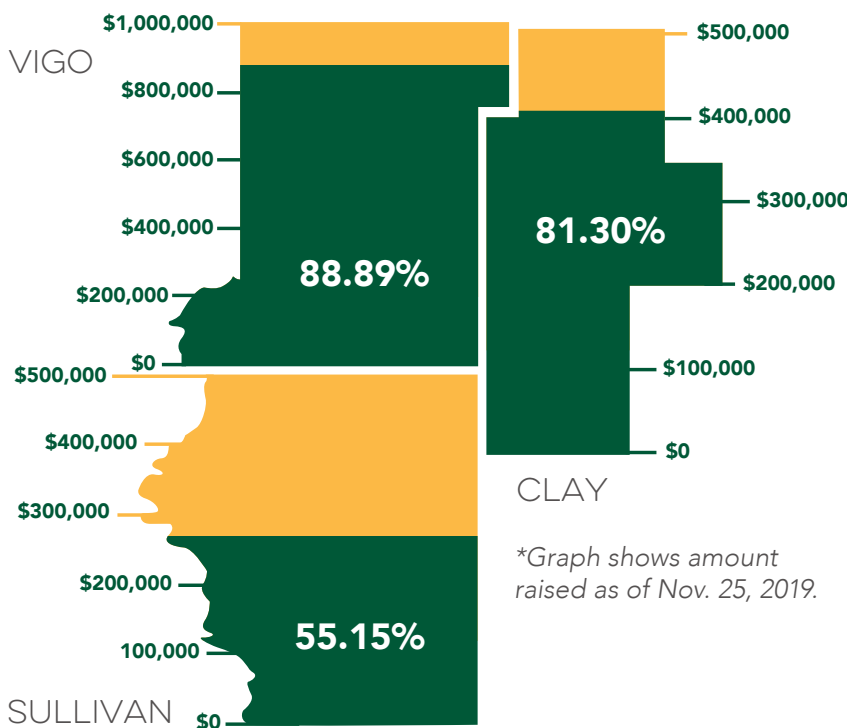
Considering a year-end gift? Your gift to the Wabash Valley Community Foundation always goes a long way toward supporting and impacting great causes in our communities – but right now, you can help triple the impact! Lilly Endowment Inc. is providing

funds through its GIFT VII initiative for current contributions made to any new or existing unrestricted endowment funds. Unrestricted endowments provide the funding for the Community Foundation's competitive grant process in each county and for special

community projects supported by the Community Foundation. A gift of \$5,000 is typically required to create a new unrestricted endowment fund; however, the GIFT VII initiative allows individuals, families and businesses to create a new unrestricted endowment fund for only \$1,667 – but only if the matching funds are available. It truly is the gift that keeps on giving!

The Community Foundation relies on generous people like you to help us make a difference for thousands of people throughout Clay, Sullivan and Vigo counties. Don't miss out on this unique opportunity to maximize your giving power this holiday season. It's just what we need to keep the communities we love moving ahead – now, and for many years to come.

The \$2-for-\$1 matching opportunity is ongoing through December 2020, or until all matching funds have been claimed.





MEMORIAL CONTRIBUTIONS

AUGUST 1 - OCTOBER 31, 2019

YES, I WANT MY GIFT TO BE MATCHED BY LILLY ENDOWMENT INC. GIFT VII TO BENEFIT MY COMMUNITY FOREVER!

NAME(S)

ADDRESS

CITY

STATE ZIP CODE

TELEPHONE

EMAIL

This contribution is:

- in honor of in memory of
 a holiday gift for

NAME(S)

Please notify:

NAME(S)

ADDRESS

CITY

STATE ZIP CODE

J.P. ALEXANDER
Ms. Heather Khan Blasingame

MEDFORD WAYNE ANDERSON
Don & Jean McMahan
Sullivan HS Class of 1954

ROBERT E. ARNETT
Wright, Shagley & Lowery, PC

LEONARD S. "STEVE" ARNOLD
Mrs. Sandi Treaster

LUCY LABEL BELZILE
Wright, Shagley & Lowery, PC

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Doug & Judi Brown

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Ms. Kathleen C. Hanlon

JOHN CRITTENDEN
Fred & Nancy Nation

PETER ANTHONY DUONG
Lucy & Peter Nalin MD MBA

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Jo Einsteadig

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Ms. Rita Flak
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Mr. & Mrs. Mark Fuson
Mr. Greg Gibson
Ms. Clarette Johnson
Mr. John Keeler
Mr. Chris Kintzel
Ms. Ali Miranda & Mr. Phil Sicuso
Mr. Rod Ratcliff
Anthony & Ellen Roberts
Mr. Jim Tanoos
Terre Haute Chamber of Commerce
Terry & Beth Tevlin
Wright, Shagley & Lowery, PC

TOM FORD
Denise & John Bell

BETTY MAE FRAZIER
Mrs. Vivian F. Niemeyer
Mrs. Barbara A. Vogel

KATHERINE "KATHY" HACKLEMAN
Sue Benstrup
Terry & Beth Tevlin

CHARLES P. "CHUCK" HANLEY
Fred & Nancy Nation
Schulte High School Class of 1962
Wright, Shagley & Lowery, PC

MARIAN HARRISON
Don Harrison

KEITH HAWKINS
Patrick & Mary Cahill

CAROLYN SUE HAYNES
Wright, Shagley & Lowery, PC

CHARLES CARTER HEDRICK
Mrs. Marsha Hedrick

HALIE HITE
Hite Dance Center

LOUIS RICHARD JENSEN
Wright, Shagley & Lowery, PC

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Dave & Janet Friedrich

JUDGE THOMAS E. JOHNSON
Lanier & Sheilah Phillips

JOSH KACKLEY
Mr. Eric Fowler & Ms. Abbey Algiers

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Mr. & Mrs. David A. Beals
Mrs. Norma Beymer
Joseph & Barbara Carney
Ms. Mary E. DeBard
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Mr. & Mrs. James Martin
Sackrider & Company, Inc.
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Ms. Marilyn Wirtz
Mr. & Mrs. Robert L. Wright

EDWARD & MILDRED KNIERIM
Mr. Robert A. Knierim

ERIC KNOWLES
Sullivan HS Class of 1964

JACK KRUMREICH
Ms. Mary Ann Chubb
Bob & Susan McCammon
Brad McMahan
Don & Jean McMahan
Harold & Malinda Medsker
Ms. Ann M. Smith

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Fred & Nancy Nation

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Wright, Shagley & Lowery, PC

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Mark Howell
Patrick & Carolyn Monaghan
Wright, Shagley & Lowery, PC

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Customink Fundraising

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Wright, Shagley & Lowery, PC

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Mr. Joshua Miller
Mr. Samuel Miller

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Ms. Barbara A. Aker
Matt Stone Family
Mr. & Mrs. James W. Swim
Ms. Deborah Traver

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Wright, Shagley & Lowery, PC

JERRY MORRIS MOUNTS
Clarence Brink

CANDACE "CANDY" KAY NASSER
Wright, Shagley & Lowery, PC

JACKQUELINE "JACKIE" SUE NUGENT-BLANFORD
Mark Howell

CONNIE LEROY O'HERN
Larry & Martha Tempel

TRIBUTES

ALYSSA BROUGH ON HER 31ST BIRTHDAY
Doug & Judi Brown

GAVIN HUBBLE ON HIS 8TH BIRTHDAY
Doug & Judi Brown

AUGUST 1 - OCTOBER 31, 2019

MEMORIAL CONTRIBUTIONS

DR. ROBERT "BOB" PABST
Patrick & Mary Cahill
Wright, Shagley & Lowery, PC

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Ms. Michaela Cox
Ms. Brittany Frederick
Mr. & Mrs. Kenneth & Rita
Senseman
Ms. Ashley Summerlot
Terre Haute Firefighters

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Wright, Shagley & Lowery, PC

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Bob & Susan McCammon
Ellen Tucker

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Plumbers & Steamfitters Local 157

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Kathy & David Brentlinger
Mrs. Barbara A. Vogel

ANNA RUTH RACOP
Wright, Shagley & Lowery, PC

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Beta Omicron Chapter of Delta
Kappa Gamma
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Mr. & Mrs. John Fread
Mr. & Mrs. Kevin Morgan
Don & Gail Nattkemper
Nancy & Jay Rodia

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Ms. Emma Campbell
Ms. Dawn Clinkenbeard
Ms. Jill Curtis
Ms. Caroline Day
Mr. Ryan Liston
Ms. Jodi Pickens
Ms. Lindsey Richardt
Ms. Heather Stenbridge
Ms. Holly Vanatti

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John & Amy Ayash

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Wright, Shagley & Lowery, PC

JUNE RANDOLPH SITARSKI
Patrick & Mary Cahill
Wright, Shagley & Lowery, PC

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HILBURN-GRIFFITH-JENKINS**
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Ms. Gail Kuta

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Wright, Shagley & Lowery, PC

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Curt & Linda Brighton
Terry & Beth Tevlin
Mrs. Barbara A. Vogel
Wright, Shagley & Lowery, PC

DELORES THOMAS
Wright, Shagley & Lowery, PC

JOHN LOUIS TOFAUTE
Wright, Shagley & Lowery, PC

JOHN MICHAEL TORRENCE
Wright, Shagley & Lowery, PC

PHYLLIS DYE TURNER
Mrs. Barbara A. Vogel

**MICHAEL ANDREW PICK
WENDLAND**
Wright, Shagley & Lowery, PC

CATHY A. WILLIAMS
Brian Miller Creative LLC

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

DR. KARLA ZODY
Dr. & Mrs. Raj Jeevan

Enclosed is my contribution of:

- \$2,500 \$100
 \$1,000 \$50
 \$500 \$25

\$250

Other _____

\$1,667 to leverage the match
and 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
 creating a fund
 leveraging the Lilly Endowment Inc.
GIFT VII Match
 making a gift from my IRA
 receiving a copy of
the Will Planning Guide
 joining a Giving Circle

NEW FUNDS

Anna Katherine and Wayne
E. Schomer Scholarship
Fund

Debra Ann Schomer Collins
Scholarship Fund

Fred Christman Scholarship
Fund

Fund for the Swope

Henry D. Bobe Endowment
Fund

Holt-Jarvis Mental Health
Scholarship Fund

Jack Krumreich and Ellen
Tucker Endowment Fund

Joe and Betsy Milner Family
Endowment Fund

Jon and Sandy Hendrich
Endowment Fund

Judy A. and Gary W.
Schomer Scholarship Fund

Julie McLaughlin Memorial
Fund

Julie V. and Forest E. Miller
Scholarship Fund

Leonard S. "Steve" Arnold
Memorial Fund

Norman L. and Carol Rae
Isbell Scholarship Fund

West Terre Haute
Community Project Fund

WILL Center Endowment
Fund

William Wayne Schomer
Scholarship Fund

Scottish Rite of the Wabash
Valley Scholarship Fund

Sullivan County High School
CEO Program Community
Project Fund

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

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

WINTER 2019

JOIN OUR GIVING CIRCLES!

Ready to make a small commitment with a big impact?

The Wabash Valley Community Foundation sponsors five Giving Circles to allow local individuals to make a big impact in their local communities. These Giving Circles, 100 Women Who Care and Guys Who Give, allow members to learn about local nonprofit organizations and support four different nonprofits each year!

Membership is open to anyone who desires to improve their local community with an annual contribution totaling *\$500 paid upfront or spread over four quarters. Each member contributes \$100 to a permanent endowment to benefit charities within their county. The remaining \$400 is

earmarked for the nonprofit organization selected by the numbers at each quarterly meeting.

While each member's contribution is small, collectively, the Giving Circles have contributed more than \$1 million to local nonprofits and have created permanent endowments totaling more than \$555,530!

To join or renew your membership, please visit wvcf.org/giving-circles.

*100+ Women Who Care Vigo County also collects \$25 to defray the cost of refreshments.

ANNUAL HOLIDAY COFFEE

FRIDAY, DECEMBER 13, 2019, 8:00AM - NOON

WE WILL ONCE AGAIN BE COLLECTING PERSONAL CARE ITEMS TO BENEFIT THOSE IN NEED IN CLAY, SULLIVAN AND VIGO COUNTIES.

FOR DETAILS, PLEASE VISIT WVCF.ORG/HOLIDAYCOFFEE2019

200 SOUTH 8TH STREET
TERRE HAUTE, IN 47807

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