



Your LEGACY

SPRING 2017

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Simple and Flexible Donor Advised Funds Your Giving Solution

Giving through a charitable fund is satisfying. If you want a fund with flexibility to change as community needs or your preferences change, a donor advised fund is the perfect fit.

Like a private foundation, a donor advised fund invests your gift and then sends grants out to your preferred charities. Unlike a private foundation, there are no IRS required payout rules, excise taxes or separate filings. Community Foundation staff handles administrative tasks and you enjoy the fun side of giving.

Often a couple creates a donor advised fund, then over time, they integrate their children as successor advisors. The Smith family of Sidney took a slightly different approach.

“Our children provided the seed money to establish the Norman and Jean Smith Family Fund as a Christmas gift,” notes Jean. “I was very touched, I cried. Support to build the Fund has come from Norm and I and our family.”

The Fund supports causes the Smiths value, including an eye care program for the community’s neediest kids. Someday when the family ceases involvement, the Fund will continue to support children in Shelby County.

Sometimes advisors are not family. The Monarch Legacy Fund, created from the former Monarch Machine Tool Company



A grant supports the Parkinsons Exercise Program at the Shelby County YMCA

Foundation, is advised by a committee of former employees and community residents.

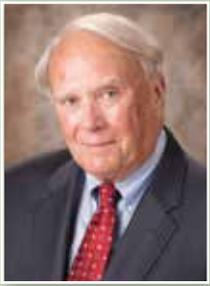
A recent Monarch Legacy grant helped the Sidney-Shelby County YMCA redevelop a racquetball court into a room suitable for the new Parkinson Exercise Program. A grant supported costs to enlarge a small doorway and add carpeting and sound baffles. The enhancements help the Y serve more than 20 participants in varying stages of the disease.

Not sure a long-term advised fund is right for you? Try a Gift Account.

A Gift Account, a short-term donor advised fund, enables you to make a gift earmarked for your granting interests. There are no fees, minimum asset size or long-term commitment. You recommend the receiving charities and grant amounts until your gift is depleted. If you like it, you keep using the Gift Account or maybe begin creating a longer-term fund like a scholarship, donor advised or community granting fund.

Learn more at www.commfoun.com or contact Donor Relations Director Jessica Fortkamp at 498-7800.

Upcoming Events Add to Your Knowledge



Harry Faulkner



Dr. Barbara Hill

End of Life Planning: The Final File

Presenters: Presented by Attorney Harry Faulkner and Dr. Barbara Hill

- Wilson Health Professional Building
Basement Level, Rooms A&B (Enter Door 4)
- Please RSVP to: mspicer@commfoun.com or (937) 497-7800

Tuesday, April 11
6:30 - 8:00 p.m.

This is a collaborative effort of:

*The Community Foundation of Shelby County, Lehman High School Foundation
Ohio Living Dorothy Love, Sidney-Shelby County YMCA Foundation and
Wilson Health Foundation*



Mike Shebak

Economic Outlook Luncheon

Presented by the Community Foundation of Shelby County in partnership with the Sidney-Shelby County YMCA and the Sidney-Shelby County Chamber of Commerce.

Presenters: Mike Shebak, Sr. Managing Director, Head of Institutional Consulting at Hartland, the investment consultant of the Community Foundation

- Sidney-Shelby YMCA, 300 East Parkwood Street, Sidney
- Complimentary Lunch
- Please RSVP by April 12 to: (937) 492-9134
Limited to 350 registrants.

Thursday, April 20
11:30 a.m. - 1:15 p.m.

Jessica Fortkamp Joins Staff

We welcomed Jessica Fortkamp last fall as our Donor Relations Director. She replaced Jessica Vaglianti, who moved from the area.

You may have already met Jessica, but you may not know a couple of interesting facts. She is a former Care Flight nurse and brings that high energy, compassion and quick thinking to her new role. She and her husband Doug are Minster natives, residing in Sidney since 2010 with daughters Kaitlyn and Brooklyn.

Jessica is very community oriented and participated in development activities at Dayton Childrens, recently helping them complete a successful fundraising auction. As Donor Relations Director, she is a point of contact for current and prospective donors and professionals who assist clients with their finances and estates.



Jessica Fortkamp

Contact Jessica at jfortkamp@commfoun.com or (937) 497-7800.

WELCOME



The Doug Borchers Family

NEW FUNDS

Douglas and Elizabeth Borchers Family Foundation

The Doug and Beth Borchers family will advise the fund for investment and granting. In the future, the fund will transition to support organizations in or serving Russia or pro-life organizations in Shelby County.

Douglas and Elizabeth Borchers Baseball/Softball Scholarship Fund

Russia seniors who played four years of high school baseball or softball are eligible for the scholarship, which will begin awards in 2018. Selection focuses on player qualities such as teamwork, leadership, and sportsmanship, as well as community and school service.

Douglas and Elizabeth Borchers University of Dayton Scholarship Fund

Russia seniors bound for the University of Dayton are eligible to apply. Awards for these future Flyers will begin in 2018.



Dale and Kathy Nichols Family Foundation

This donor advised fund enables the Nichols to recommend grants to charities they value.

Someday when it's no longer advised by the Nichols family, the foundation will transition to award competitive grants to organizations in or serving their home community of Russia.

Irene Palko Scholarship Fund



In memory of the educator known earlier in life as Sister Hyacinth and later as Miss Palko, the scholarship fund was created by Dan and Nita Watercutter to support Anna graduating seniors who will pursue a degree in education.

Paul and Veronica Perin Scholarship Fund

Created by Veronica (Perin) Presas in memory of her late husband Paul Perin, the scholarship will benefit graduating seniors at Ft. Loramie who demonstrate academic achievement and active involvement and leadership in school and community service. The fund is part of the Ft. Loramie Education Foundation.

Redskin Memorial Park Fund

The fund receives and administers gifts for facility or grounds improvements at the newly constructed park near the Ft. Loramie Junior High/High School campus.



Kent R. Smith Fund

Through his estate, the late Sidney High School retired teacher is providing grants to specified community organizations and scholarships to SHS alumni pursuing a degree in education.

Also established, are five Gift Accounts created by local couples and individuals. See the article on page 1 about Donor Advised Funds and Gift Accounts

Gifts are welcome to these or any funds administered at the Community Foundation. Checks may be made payable to 'Community Foundation of Shelby County' with the intended fund listed on the memo line or in an accompanying note.



The Community
Foundation of
Shelby County

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OUR MISSION

To cultivate, administer and distribute legacy gifts for the benefit of our Community.



The Community
Foundation of
Shelby County

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www.commfoun.com

Russia Wellness Foundation Completes Another Community Project

The Russia Wellness Foundation has been a catalyst for projects for the community of Russia since 2008. Area residents are always welcome to come to the board with ideas to better the community, whether it be the annual egg hunt, Santa's visit to the park, or something larger like the track facility. You help grow this fund

through an annual fund drive and other fundraising events. Because of your gifts, the Russia Wellness Foundation recently built a 2,400 sq. ft. storage building providing the track facility and school with much needed storage space. Another exciting future venture is a beautification project for a green space on Main Street. The Russia Wellness Foundation has been a great source for the community to provide exciting improvements and events to help bring the Russia community together along with making it a better place to live.

