

transformation

2006 annual report





coming together

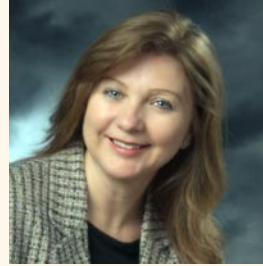
“Coming together is a beginning;
keeping together is progress;
working together is success.”

– *Henry Ford*

a letter from the president & the executive director



Patti Alderson
president



Katie Braswell
executive director

Dear Friends,

It is our pleasure to present to you a summary of The Community Foundation of West Chester/Liberty's activities of 2006. Your strong support has made possible our continued growth and success. You have been instrumental in the Foundation's increasing impact throughout our community both as a grantmaker and a steward of our charitable resources.

Our theme for this year's annual report is Transformation. Because of the work of the Foundation, many lives have been transformed and community projects have come to life. Not only have many in the community been impacted and transformed, but the Foundation has evolved and transformed as well. And, because of this evolution, the Foundation and its original brand was in need of fine tuning to better display what the Foundation represents today. Our new logo is unveiled in this publication, and we hope you like it as much as we do!

We are pleased to announce the Foundation's achievement in receiving the national recognition for meeting the rigorous standards set forth by our professional organization the Council on Foundations. Eighteen months ago, the board voted to adhere to these national standards furthering our commitment to ensuring you, the public, an efficient, credible and professional organization. We are proud of this accomplishment and will continually strive to provide excellent service to our donors and community.

Thank you, Board Members, Advisory Board Members, Committee Members, Fund Holders, Donors, Volunteers, Businesses and Staff for your commitment and support of the Foundation and our community. You make it all possible; and, together we are transforming the lives of those we touch. We hope you enjoy reading the many stories and accomplishments of this past year and continue to allow us to assist you in reaching your charitable goals while advancing philanthropy throughout West Chester and Liberty Townships.

With warmest regards,

A handwritten signature in black ink that reads "Patti Alderson". The script is fluid and cursive.

Patti Alderson

A handwritten signature in black ink that reads "Katie Braswell". The script is fluid and cursive.

Katie Braswell

transformation

In 1994, what began as an annual community event to raise money for cancer has evolved into the hub of charitable giving for our communities. Yes, The Key Event was the precursor for The Community Foundation of West Chester/Liberty.

The Foundation was created by a group of nine women who, with the blessings of The Key Event Committee, set forth to establish a community foundation. And, in September of 1999, The Community Foundation of West Chester/Liberty was incorporated. Since that time more than \$1 million has been awarded in grants transforming the physical aspects of our community as well as impacting the lives of those who live here.



As the Foundation works to improve the community, it continues to evolve into an asset that donors, businesses, elected officials and community members turn to for assistance and guidance with charitable issues and concerns. The Foundation has transformed from a single social event benefiting a single cause into a multi-million dollar public charity whose primary focus is to build endowment; encourage, support and facilitate philanthropy and improve the quality of life in West Chester and Liberty Townships.

To better reflect the work of the Foundation, the Board of Trustees is pleased to unveil a new logo. This new logo was developed after more than a year of planning, developing and evaluating our community and the transformation of the Foundation. This visual representation symbolizes people from our two Townships who are joining together to give from their heart for the betterment of our community.

national standards

“Adopting and adhering to high standards is the best way we can demonstrate our ongoing commitment to maintaining the trust of our donors and the entire community.”



In 2006, The Community Foundation was recognized for having organizational and financial practices that are in accordance with the National Standards for U.S. Community Foundations. The National Standards Seal by our name indicates official confirmation from the Council on Foundations that we have met the most rigorous standards in philanthropy. It affirms our commitment to financial security, transparency and accountability. The confirmation states that our grantmaking includes an open, competitive process designed to address the changing needs of our community. The National Standards Seal also confirms our history of honoring donors' wishes to support education, cultivate our local parks, expand the arts, feed children and support countless other important causes.

The National Standards for U.S. Community Foundations Program was established in 2000 in cooperation with the Council on Foundations. National Standards guide community foundations in establishing legal, ethical and effective operational practices that serve as blueprints for internal development and benchmarks for external assessment. The 43 National Standards require The Community Foundation of West Chester/Liberty to document its policies in donor services, investment management, grantmaking and administration. To receive confirmation of National Standards compliance, The Community Foundation submitted its organizational and financial policies and procedures to a rigorous peer review. As a result of the confirmation, the seal indicates the integrity and credibility of our organization.



2006
community
grants

BIG BROTHERS BIG SISTERS OF BUTLER COUNTY, INC.: \$2,000

Lakota Site Based Program - Funding provided mentoring sites for children in grades 1-6 at Lakota Pointe and North Pointe Town Home complexes.

BOYS & GIRLS CLUB OF HAMILTON, INC.: \$1,436

Summer Fun at the Boys & Girls Club - 35 youth from West Chester Township were provided access to a safe environment and summer program opportunities at the Club.

CINCINNATI HILLS CHRISTIAN ACADEMY: STUDENT ORGANIZED SERVICE: \$1,036

Shawnee Elementary ESL (English-as-a-second-language) - ESL students participated in after-school enrichment activities. These activities targeted students and their families in grades K-6 at Shawnee Elementary.

CONNEX GROUP: \$3,000

Job Adaption Tools - Job adaptation equipment was provided for individuals who attend the work-study program through Lakota Schools. The vital program prepares students with disabilities and/or barriers for employment success upon graduation from high school.

THE GREAT MIAMI VALLEY YMCA: \$3,000

Expanding Access - A new handicap lift was provided for the newly remodeled swimming pool at Camp Campbell Gard. The handicap lift allows people with disabilities the opportunity to enter and exit the pool safely.

HEARING SPEECH AND DEAF CENTER OF GREATER CINCINNATI: \$5,000

Speech Mapping - Funding provided a new speech mapping device for the Center's West Chester location. Speech mapping visually tracks live speech and its acoustic properties to allow for better treatment and prevention of hearing loss.

LAKOTA SCHOOLS: \$3,200

Adult Literacy Program for ESL Parents - A pilot program was developed to assist adult ESL residents of West Chester and Liberty Township to adapt to their new community.

MOTHER TERESA CATHOLIC ELEMENTARY SCHOOL: \$6,300

Expanding the Arts - Funding supported the purchase of a portable sound system and construction of a new theatrical stage at the Mother Teresa Catholic Elementary School.

PARACHUTE: SPECIAL ADVOCATES FOR CHILDREN OF BUTLER COUNTY: \$1,500

Sponsor a Volunteer - To recruit and train Court Appointed Special Advocates from West Chester.

REACH OUT LAKOTA, INC.: \$6,000

Reach Out Expansion - Support was provided to assist with the expansion of Reach Out Lakota to allow for additional storage of items needed to help families who rely on Reach Out Lakota for support.

RACHEL'S CHALLENGE: \$3,400

Promoting Kindness in the Schools - Funding provided support to bring Rachel's Challenge, a program to promote kindness and compassion to others, to Lakota East, Lakota West and the Lakota Freshman school.

SUPPORT TO ENCOURAGE LOW-INCOME FAMILIES (SELF): \$7,000

Project 2 Empower for West Chester/Liberty - The program worked with 40 low-income families in West Chester/Liberty Townships to create an opportunity for self-sufficiency by enhancing the family's ability to withstand stress, while improving their economic stability and overall well-being.

THE WEST CHESTER FRIENDS OF THE LIBRARY: \$2,200

Summer Reading Program 2006: Paws, Claws, Scales and Tails- Support was provided to the library's reading program. A new sound system was provided along with reading incentives for children of all ages aspiring to read during the summer season.



“Since our inception, the Foundation has awarded more than \$1,000,000 in grants. Without the Foundation these charitable needs may never have been met.”

technology enhances quality of life for hearing impaired

Suffering from extreme hearing loss over the years, local resident, Tina Appel struggled each day to hear the conversations around her. She had many hearing aids to help her overcome the obstacles that people, like herself, face on a daily basis.

Frustrated that her hearing aids weren't working properly, Tina turned to the West Chester office of The Hearing, Speech and Deaf Center. At the center, Tina was fitted with a new hearing aid using a new speech mapping device purchased with grant dollars from The Community Foundation. The speech mapping device provides an objective measure of the hearing aids effectiveness to accurately adjust to the hearing targets of each individual. The device allows the audiologist to visually track live speech and its acoustic properties. This information is displayed on a computer screen and can be easily adjusted to provide a proper fit for each patient on the initial visit, saving time and frustration of each patient using the device. The portable device is also used to counsel patients and their family members by simulating what a typical conversation sounds like to the hard of hearing.

Tina is excited to finally have a hearing aid that improves her ability to hear, therefore improving her quality of life. “I am just so excited to have two hearing aids that work,” says Tina.



“I have this theory that if one person can go out of their way to show compassion, then it will start a chain reaction of the same.”

- *Rachel Scott*

rachel's challenge promotes kindness



As a result of the Foundation's Youth In Philanthropy (YIP) Needs Assessment conducted in 2005, The Community Foundation joined with the student advisors of the YIP Fund to address one of the top concerns among teens in the Lakota School District... bullying. Together, the Foundation, a private donor and YIP hosted Rachel's Challenge, a program that inspires, instructs and enables students to bring positive change to local schools. Several assemblies were held at Lakota East, Lakota West and the Lakota Freshman School, plus two evening sessions were held for the public-at-large.

Darrell Scott, the father of Rachel Scott, the first student to be killed at Columbine High School in 1999, was the featured presenter. Rachel had a passion for kindness and reached out to those who were picked on, people with disabilities and new students in the district. Mr. Scott encouraged students to continue to spread Rachel's message of kindness to their peers and classmates.

In order to keep the message alive within the schools, Friends of Rachel (FOR) groups have formed within the district. Their goal is to convey a positive message: For compassion, For kindness, For change. Group members develop strategies to carry out Rachel's message to spread kindness within each school.

types of funds

The Foundation offers a variety of fund options for you, your family, businesses and nonprofit organizations. Our personalized service offers efficient and flexible ways for donors to give back to the community. Our staff works closely with each donor to assist them in selecting the right fund to meet their charitable goals. Each fund holder can determine how much or how little they want to be involved with their fund.

UNRESTRICTED FUNDS enable donors to make charitable gifts for the benefit of the entire community. These funds allow the Foundation to respond quickly to pressing community needs. Grants are provided to those organizations working to enhance the quality of life in West Chester and/or Liberty Townships.

AGENCY ENDOWMENTS are established by organizations or families to support the mission and goals of a non-profit agency. These funds help create a steady stream of income for operations, programming and other organizational needs.

DONOR ADVISED FUNDS provide an opportunity for donors to recommend distributions to specific charities at their convenience. These funds allow the donor to combine income tax planning with charitable giving. Donors obtain an income tax deduction for the value of their appreciated assets when making a gift to the Foundation.

DESIGNATED FUNDS provide support to a donor's favorite charity. These funds create a permanent endowment to support organizations long-term.

FIELD OF INTEREST FUNDS are the perfect choice for donor's who wish to support an area or interest, such as, the arts, environment, or children.

SCHOLARSHIP FUNDS provide an opportunity to help students achieve their educational goals. Scholarship funds can be designed for any level of education from pre-school to post-graduate work. Donors may designate particular eligibility requirements, field of study or a specific geographic area.

DEFERRED GIFTS allow donors to leave a charitable legacy. The three major types of deferred funds include bequests, charitable remainder trust and life insurance policies. The Foundation staff would welcome the opportunity to discuss the benefits of these contributions with you.

2006 NEW FUNDS

Phyllis and Dick Clarke Family Fund
Lakota Sports Organization Fund
Friends of the West Chester Library Fund
Leo Johnson Memorial Fund
Julia Ellen Burnett Memorial Fund
Joe Busam Fund
Eastside Angels Fund

Traveler Assistance Fund
Volk Family Fund
JD Roberts Family Fund
Greg Lemmel Scholarship Fund
Republic Wire Inc. Fund
Greg and Diane Stevens Fund
Lutz Family Fund



scholarships

OTHER COMMUNITY FOUNDATION SCHOLARSHIPS INCLUDE:

Thomas E. Dunlap Scholarship Fund

Ben Feazel Scholarship Fund

Susan Hendel Scholarship Fund

Craig Jones Scholarship Fund

THE COMMUNITY FOUNDATION OF WEST CHESTER/LIBERTY SCHOLARSHIP – \$500 (TWO AWARDED)

This scholarship, open to any student in the West Chester/Liberty area, is for students who wish to attend a trade school, two-year technical or community college or a four-year college or university.

KYLE J. BABCOCK SCHOLARSHIP – \$2,000 (ONE AWARDED)

Kyle Babcock was a passionate 18-year old with an infectious smile and quick-wit. As a competitive soccer player at Bishop Fenwick High School, he is remembered as an intelligent, athletic, outgoing student with a great sense of humor. The scholarship allows Kyle's spirit to live on.

HAROLD DRAUT SCHOLARSHIP – \$750 (ONE AWARDED)

The Harold Draut Scholarship provides a legacy to Mr. Draut a Lakota educator for almost 30 years. Mr. Draut was a caring, sensitive, trustworthy and unselfish man whose sense of humor and humble spirit endeared him to everyone.

BOB LAWHORN EDUCATION SCHOLARSHIP –\$8,900* (ONE AWARDED)

This scholarship has been established in memory of Bob Lawhorn, a spirited man who cared about others throughout his life. Bob reached out to people from all walks of life which was demonstrated by his caring smile, generosity, humor, and real compassion. His zest for life was felt by everyone he touched.

LIFT (LEADING INDIVIDUALS FOR TOMORROW) SCHOLARSHIP FUND –UP TO \$5,000

This scholarship has been established to assist individuals with the desire and commitment to better themselves and their families through completing or continuing their educational goals.

GLEN E. MIELING SCHOLARSHIP -\$2,000 (ONE AWARDED)

This scholarship honors Glen Mieling who had a passion for living and a love of science. As a senior scientist at Procter & Gamble, his insight and intelligence allowed him to make many valuable contributions in the area of drug design and development. Outside of work, his great sense of humor and vitality endeared him to family, friends and co-workers.

PETE'S LIST OF EXCELLENCE IN HISTORY AND GOVERNMENT – \$250 (TWO AWARDED)

Raymond (Pete) Peters put aside his educational aspirations to put his life on the line in World War II. After legislation was signed enabling WWII veterans to receive their high school diploma, Pete received his diploma during a celebration for his 75th birthday. Like Pete, Pete's List, recognizes students who have excelled in history and government

KRISTIN RENNEKER SCHOLARSHIP FUND – \$2,000 (TWO AWARDED)

Kristin is remembered as a beautiful, intelligent, athletic and outgoing student. In addition to sharing the captain spot on the varsity basketball team, Kristin was an All-Academic GMC player who participated in a varsity sport. Kristin's legacy lives on through the scholarship fund.

DANA SPANGLER SCHOLARSHIP FUND - \$500 (ONE AWARDED)

This scholarship has been established in memory of Dana Spangler, a young lady who had a great love of life. Dana was an active student in school and community who loved volleyball and softball.

MARK VACCARIELLO SCHOLARSHIP FUND - \$300 (TWO AWARDED)

"Mr. Lakota, 1979" was the caption under Mark's name in his high school yearbook. An outstanding young man, faced with an overwhelming battle with cancer, fought with great courage, spirit and endurance and was never without a charming smile. This scholarship allows Mark's spirit to live on.

VOICE OF AMERICA CENTRE SCHOLARSHIP FUND – UP TO \$5,000

Provides an opportunity to recognize and reward the community's military men and women by assisting veterans returning from active duty with educational and/family obligations.



kyle j. babcock scholarship

On May 25, 2005, just three days shy of his high school graduation, Kyle Babcock's life was cut short on a Tennessee road. The Bishop Fenwick High School senior was a passionate 18-year-old with an infectious smile and a quick-wit. Kyle was an honor role student and a competitive soccer player.

To continue to support these wonderful qualities in other students, a scholarship fund was established in Kyle's memory at The Community Foundation of West Chester/Liberty. The \$2,000 award provides tuition assistance to the student who best exemplifies the qualities that Kyle possessed. In 2006, the first ever Kyle J. Babcock Scholarship was awarded to Kevin Jones, a Bishop Fenwick student with a bright smile and fun-loving nature. Like Kyle, Kevin enjoys playing soccer with hopes to play at a collegiate level.

Kyle gave us a legacy of excellence, commitment and an eternal smile that will always be remembered.



youth in philanthropy

Youth in Philanthropy, an initiative of the Community Foundation and the Pulse Journal News, is a program designed to introduce local high school students to philanthropy and community development. The program provides hands-on experience that benefits both the participating students and local charities. By their involvement with the Youth In Philanthropy program, students work in the community to raise money, build endowment funds and make grants to non-profit organizations working to improve the lives of youth our community.

In 2006, YIP awarded more than \$6,800 in grant to local non-profits. In addition to their support of the Rachel's Challenge Program, grants were provided to the Boys & Girls Club of Hamilton, Inc, Parachute: Special Advocates for Children of Butler County, Reach Out Lakota and The West Chester Friends of the Library.

2006 members

Kristi Ludlow, *Co-Chair*
Nick Reinel, *Co-Chair*

Caitlin Cummins
Ashley DeBrosse
Michelle DeBrosse
Bethany Dibble
Megan Dougherty
Alyssa Fledderjohn
Jessica Huizenga

Sean Kelly
Allyson Kist-Kline
Katie Kohring
Sarah Landesman
Sarah Massey
Jasmine Murray
Kenji Takahashi
Amy Thraillkill
Jourdan Weller
Lauren Dooley
Scott Gilday
Kelly Muenchen
Jackie Wallace
Stuart Bumgarner
Kyle Ludlow
Alexander Savage
Samantha Whelan
Abby Wimmers



leo johnson memorial fund

Leo Johnson and his love for nature will always be remembered through the Leo Johnson Memorial Fund. Whether he was fishing, bird watching or hiking, Leo loved being outdoors.

On March 13, 2006, at the age of 13, Leo lost his courageous two-year battle with Leukemia. With the support of Leo's family, his church, numerous friends and community members, Leo's legacy will continue through an outdoor space, located in West Chester, dedicated in his name. This space will provide the opportunity for people to be surrounded by nature while enjoying the birds and the outdoors that Leo loved so much. The space will provide an opportunity for people to relax, reflect, rejuvenate and remember the young man who inspired so many in our community.

sassy's friends



In 2003, Sassy's Friends, a Field of Interest Fund was established at The Community Foundation of West Chester/Liberty in honor of a donor's late dog, Sassy. The fund provided a way for the donor to pay tribute to the family pet, while giving the opportunity to fulfill her charitable goal of helping other animals and family pets in our community. In 2006, the Sassy's Friends Fund provided \$25,000 in grants to two local organizations.

\$15,000 was awarded to the United Coalition for Animals (UCAN). The grant provided support for a new spay/neuter clinic in Queensgate. The new clinic is scheduled to open in 2007 and will provide high quality, affordable spay/neuter surgeries. The clinic will utilize a combination of low-cost services, accessibility and education to target individuals with pets who would not otherwise have their pets spayed or neutered. The clinic will help to reduce the number of dogs and cats currently being euthanized because they cannot find a home.

\$10,000 was awarded to further the development of Wiggly Field. The dog park at the Voice of America Park provides an opportunity for hundreds of people and their canines to enjoy off-leash playtime. Upon completion, Wiggly Field will provide 3 acres of contained space, a dog friendly water fountain, trees and landscaping to provide shade, signage and benches and play equipment for the dogs.

“The Power of the Purse Fund is a perfect way for women to become involved in the community, learn about area charities, and make a real difference.”

power of the purse woman’s fund established

Starting with a simple goal of bringing women together to address needs important to women in our community... the advisors of the Power of the Purse Fund celebrated the initiation of their Fund with their first event in November, 2006.

The Power of the Purse Fund educates, inspires and increases the number of women committed to philanthropy in order to strengthen our community by providing funds and assistance to issues that are important to women.

Women in our community have joined together to pool their resources and collectively determine the best use for their dollars. By pooling their limited resources the group can provide grants that have the potential to make a large impact in our community.

Grant recipients are nominated by Power of the Purse members and should be located in and/or benefit the people in Butler or Warren Counties. The Power of the Purse Fund is excited to award its first grant in 2007.



“The opportunity of a lifetime to give the gift of a lifetime.”

IRA contributions

There are a variety of ways donors can contribute to The Community Foundation of West Chester/Liberty; and, now may be the best time to give if you are considering a transfer from your individual retirement account (IRA). Thanks to a provision in the new federal Pension Protection Act of 2006, individual holders of traditional and Roth IRAs who are at least 70½ years old can transfer up to \$100,000 from their IRA directly to charity. By going directly to charity, the money is not included in the IRA owner's income and most importantly is not taxed, preserving the full amount for charitable purposes. The law covers all gifts made in 2006 and 2007. As a qualified public charity, The Community Foundation of West Chester/Liberty can help donors execute the transfers and choose from several charitable fund options for their gift.



*other ways
to give*

CASH GIFTS

This option is simple, fast and flexible offering an immediate tax deduction.

GIFTS OF APPRECIATED ASSETS

When designated as a gift, the donation of securities or real property can often provide important tax advantages. The full market value of your gift can generally be deducted without recognizing income on the gain from your real cost.

BEQUEST BY WILL

A bequest can be a specific lump sum of money willed to one of the Foundation's endowment funds or your own named endowment fund. It can also take the form of a percentage of your estate or a piece of property.

IRA OR QUALIFIED PLAN

At death, retirement plan or IRA balances are included for estate and income taxes - often up to 85 percent. Funding a charitable bequest with an IRA or retirement plan prevents the bequest from becoming a liability of your estate, and the gift is made with pre-income tax funds.

CHARITABLE REMAINDER TRUST

This strategy is ideal for donors who want to provide a life income for themselves, their spouse or children. The tax benefits for this type of trust are substantial. Upon the donor's death, the assets go to the Foundation and benefit the community for years to come.

"LOANS" OF ASSETS

With a charitable lead trust, the assets transferred to the trust are eventually returned to the donor or, more typically, to the donor's children. Income is paid to the Foundation annually while the assets are in the trust. Such trusts can be created during lifetime or at death with significant savings in gift or estate taxes.

CHARITABLE GIFT ANNUITY

A gift annuity is a life annuity for one or two lives, issued by the Foundation in exchange for gift property, with the Foundation guaranteeing the annuity payment to the annuitant(s). It offers a charitable tax deduction for the value of the remainder gift, the basis is recovered tax-free over your lifetime, and the Foundation receives your capital gift when income needs end.

LIFE INSURANCE POLICY

A life insurance policy is a creative avenue for charitable giving and can be an inexpensive way to make a substantial contribution to the Foundation. Name the Foundation as the owner and beneficiary and you are entitled to a tax deduction equal to the value of the policy. Any future insurance premiums are also deductible as charitable gifts.

REAL PROPERTY WITH LIFETIME USE

A gift of real estate can be made to the Foundation while providing the donor with lifetime use of the property. At time of death, the property is an asset of the Foundation and is excluded from the donor's estate.

TRANSFER OF PRIVATE FOUNDATION

A transfer of a private foundation into a component fund at The Community Foundation is fairly simple. This opportunity provides many advantages including a higher tax deduction for any future gifts.

plan a gift, leave a legacy

The following is the suggested legal language to use in your will for making a bequest to The Community Foundation of West Chester/Liberty.

BEQUEST FOR GENERAL PURPOSES

"I give & bequeath an unrestricted, unconditional gift of \$ _____ or _____% of my estate to The Community Foundation of West Chester/Liberty, West Chester, OH or its lawful successor to establish the (your name or family name) fund."

*or more information contact the
Foundation at (513) 874-5450.*

planned giving



The Foundation offers several deferred giving arrangements that can be established for your lifetime or through your will. And they can be structured to provide a life income for yourself or a loved one. These arrangements include:

- Charitable remainder trusts and unitrusts offer you or another beneficiary income for a lifetime or through the term of the trust. When the trust expires, the Foundation receives the remainder to carry out your charitable intentions.
- Pooled income fund is a simple life income arrangement in which income from your gift is paid to you or someone you designate. When the last beneficiary passes on the funds go to the Foundation.
- Remainder interest in a residence or farm offers you the option of making a gift of all or a percentage of either the home or farm to the Foundation.
- Life insurance policies are an excellent choice for creating a major gift at little cost to you. By naming the Foundation as beneficiary of a new or existing life insurance policy, you receive a tax deduction for the value and any subsequent premium payments. When the policy is redeemed, the Foundation will use the proceeds to carry out your charitable objectives.

The Foundation would like to thank the following advisors who have offered professional assistance in 2006: Brent Arter, Brent Arter State Farm Insurance; Richard Flynn, Flynn & Company; Thomas B. Holding, Lincoln Financial Advisors; Kurt Jacobsen, Umble, Gayhart & Jacobsen; William C. Keck, Milliken & Fitton Law Firm; Trevor Lemmel, Stautberg Insurance; Helen Fanz LeVay, Cunni, Ferguson, & LeVay Co., LPA; Michael Miller, Graydon Head & Richey; William Schumacker, Huntington Bank; Joshua A. Shapiro, First Financial Bank; Andrew Shultz, Council on Foundations; Jonathon Theders, Clark-Theders Insurance Agency, Inc.; and Suzanne Weisbrod, Northside Bank and Trust Company.

operating endowment

These funds will help secure the Foundation's future, by building a permanent, dependable source of funds that benefit our community.

FOUNDING SUPPORTERS

The Community Foundation of West Chester/Liberty is in the midst of an operating endowment campaign...an investment in the future. These funds will help secure the Foundation's future, by building a permanent, dependable source of funds that benefit our community. With your support and investment, great things will continue to happen today and for future generations.

The Foundation is close to reaching its \$4 million dollar goal. We ask that you consider supporting our efforts as we create a valuable community resource. For more information about the Foundation's operating endowment campaign, please contact the Foundation offices at (513) 874-5450 or by email info@wclfoundation.com.

The Foundation would like to thank all of our operating endowment campaign supporters for their generosity.

FOUNDING BUSINESSES

AK Steel Middletown
Alderson Properties
Armor Holdings,
 Mobile Security Division
Huntington Bank
North Ridge Realty Group
Pierre Foods
Larry & Sandy Brueshaber
Clark Theders Insurance Agency, Inc.
The Lang Agency
First Financial Bank
Flynn & Company
Ford Development Corp.
Haglage Construction
Hutsenpiller Contractors
Kleingers & Associates, Inc.
Mercedes Benz of West Chester
Planes Moving & Storage
Republic Wire, Inc.
Schumacher Dugan Construction
Sonitrol of SW Ohio
Tri-County Heating & Cooling
United Group Services
US Bank

FOUNDING FAMILIES

Dick & Patti Alderson
Greg & Sue Amend
Steve & Linda Binder
John & Deborah Boehner
The Benhase Family
Larry & Sandra Brueshaber
Ed & Ruth Carey
Mark & Karen Carnahan
Charles & Barbara Chappell
Dick & Phyllis Clarke
Red & Jo Deluse Family
Bob Hutsenpiller
Calvin & Judy Johnson
Otto & Gayle Keeton
George & Debra Lang
Bob & Lew Ann Lawhorn
Tom & Barb Lutz
Bill & Jennifer Marquet
Mary & Megan McConnell
Joe & Sue Meyer
Larry & Susan Morgan
Bob & Nancy Quatkemeyer, Jr.
Carl & Denise Renneker
Maria Schrudder
Mitchell Schrudder
Larry & Mary Schumacher
John & Bitsy Shaffner
Jim Schmalz & Family
Jonathan & Heather Theders
The Todd Family
Chris & Sandie Wunnenberg

COMMUNITY SUPPORTERS

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 & Development Co.
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Sam & Becky Harris
Robert & Sylvia Harrison
Jason & Kris Langhammer
Dr. Edward & Christine Maag
Mueller Roofing
Michael & Kerry Murray
National City Bank
Mid-Miami Healthcare
 Foundation
David & Susan Noonan
Pipe Products
J.D & Kathleen Roberts
Norman & Chris Stehlin

Greg & Diane Stevens
James & Naomi Stock
Jeff & Colleen Swayzes
Richard & Ann Theders
David & Carol Thomas
Gary & Dee Dee West
West Chester 75
Dan Winterhalter &
 Madonna Durbin
Thomas & Judy Zenge





sponsors

The Community Foundation would like to thank the following attorneys, estate planners, bankers, financial managers and accountants for their sponsorship of this publication.



THOMAS B. HOLDING,
Planned Giving Committee Chair

Lincoln Financial Advisors,
8223 Bay Tree Court, West Chester, Ohio 45069
tholding@lnc.com

Tom is a Certified Financial Planner and Chartered Life Underwriter with state licenses in the areas of life, accident, health and variable annuities in Florida, Indiana, Kentucky and Ohio. Tom has over 21 years of financial experience specializing in fee-based financial planning. Tom works to help individual and business clients accumulate, protect, preserve and distribute wealth as efficiently as possible.



WILLIAM C. KECK

Milliken & Fitton Law Firm
6 South Second Street, 6th Floor, Hamilton, OH 45011
keck@mfitton.com

Mr. Keck's practice is primarily concentrated in tax matters including business and succession planning for closely held business enterprises and estate planning with an emphasis upon the proper use of the latest tools and techniques to shift wealth to succeeding generations and the lowest possible transfer tax cost. Bill hold law degrees from the University of Notre Dame and the University of London.



HELEN FANZ LEVAY

Cunni, Ferguson, & LeVay Co., LPA,
10655 Springfield Pike, Cincinnati, OH 45215
hlevay@cfl-law.com

Helen is an attorney with more than 21 years of professional experience in the areas of estate planning and administration, charitable planning, corporate and real estate law. Currently, Helen is a principal in the law firm Cuni, Ferguson & LeVay, Co. LPA. Helen is a frequent lecturer at various professional seminars on estate planning and administration.



MICHAEL MILLER

Graydon Head & Richey,
7759 University Dr. "H", West Chester, OH 45069
mmiller@graydon.com

Mike's practice is concentrated in the areas of estate planning, estate and trust administration, fiduciary taxation and business succession planning. A graduate of University of Dayton School of Law, Mike is a certified financial planner and a member of the Cincinnati Estate planning Council.





WILLIAM SCHUMACKER

Huntington Bank,
3805 Edwards Rd, Ste. 350, Cincinnati, OH 45209
william.schumacker@huntington.com

William “Bill” has been in banking for 27 years. Currently with Huntington Bank, Bill manages the local private financial group office but also has Dayton and Indianapolis offices reporting to him. Bill assists clients in their investment management and wealth planning for their families.



JOSHUA A. SHAPIRO

First Financial Bank
9120 Union Centre Blvd., West Chester, OH 45069
513.603.3488, josh.shapiro@bankatfirst.com

Mr. Shapiro joined First Financial Bank in June 2006 as a Vice President in the trust department and his office is located in West Chester, Ohio. Josh works with clients in establishing, refining, and implementing their tax and estate planning. Josh earned his Bachelor of Arts degree in Economics from the University of Cincinnati and earned his law degree from Indiana University School of Law in 1999.



SUZANNE WEISBROD

Northside Bank & Trust Company,
8615 Shepherd Farm Drive, West Chester, OH 45069
suew@nsbt.net

Suzanne has been employed with the North Side Bank & Trust Co. for 15 years. Currently, Suzanne is the AVP/Branch Manager of their West Chester Office on Union Centre Blvd. Prior to her management position; Suzanne was a personal trust officer for eight years handling all personal trust, estates and probate work.



foundation events

The Community Foundation hosts two major fundraisers each year to support the work of the foundation. Together, The Community Golf Outing and The Key Event attracted over 600 people and raised \$150,000.

The Foundation would like to thank Carl Renneker and Carol Thomas for their leadership of the Golf Classic and Barbara Gorman for her guidance of the Key Event.



foundation leadership

board committees

INVESTMENT

John Shaffner, *Chair*
 Patti Alderson
 Karen Carnahan
 Daryl Demo
 Tom Holding
 Calvin Johnson
 Barbara Lutz
 Katherine Maurer

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Mary McConnell, *Chair*
 Brent Arter
 Dick Clarke
 Grady Davis
 Marty Davis
 Mary Haglage
 Debbie Jones
 Pam Krieger
 Capt. Rick Prinz

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 Rebecca Wilber, *Co-Chair*
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 Stu Eversole

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 Katherine Maurer
 Denise Renneker
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 Carl Renneker
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Vice President



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financial position

*Statements of Financial Position
December 31, 2006 and 2005*

	2006	2005
ASSETS		
Current Assets		
Cash and cash equivalents	\$ 77,050	29,993
Pledge receivable	358,856	337,500
Total Current Assets	435,906	367,493
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Capital campaign pledges	775,550	781,374
Investments	3,246,258	2,507,213
Prepaid assets	100	100
Property and equipment	20,266	27,458
Total Assets	4,478,080	3,683,639
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LIABILITIES AND NET ASSETS		
Current Liabilities		
Accrued expenses	2,009	
Grants payable	1,618	
Total Current Liabilities	3,627	
<hr/>		
Net Assets		
Unrestricted	68,940	408,496
Unrestricted designated	7,841	26,196
	76,781	434,692
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Restricted net assets		
Temporarily restricted	282,234	1,016,314
Permanently restricted	4,115,438	2,232,633
Total Net Assets	\$ 4,474,453	3,683,639
Total Liabilities and Net Assets	\$ 4,478,080	3,683,639

OUR MISSION

To encourage, support and facilitate philanthropy and improve the quality of life in the West Chester/Liberty area.

OUR VISION

The Community Foundation of West Chester/Liberty serves as a leader and resource for philanthropy; builds and permanently holds a growing endowment for the community's changing needs; provides flexible and cost-effective ways for donors to improve their community now and into the future; promotes collaboration among local funding organizations and service providers to address community needs; and, makes grants and provides counsel and assistance that will have a significant impact upon the residents of West Chester and Liberty Township.

2006 Independent audit performed by Stephenson & Warner, Inc.

The Community Foundation is pleased to work with our Investment Managers; First Financial Bank & Huntington Bank.

2006 donors

thank you

The Foundation would like to thank
the following donors for their contributions.

Their trust and commitment enable us
to improve the communities of
West Chester/Liberty and beyond.

It is through their generosity that we are
able to connect people who care with
causes that matter.

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