

giving matters

a newsletter for our friends and supporters



December 2011

AS THANKSGIVING APPROACHES, ALL OF US AT THE COMMUNITY FOUNDATION GIVE THANKS FOR YOU!

Friends,

Thank you for making this a tremendous year for the Foundation and the community! Your generosity enabled us to meet the increased needs of so many through our community grant awards.

Whether you are a Donor, Sponsor, Board Member, Committee Member, Volunteer or Event Attendee, you play a significant role in making us an integral part of this community. Together, we are successfully making West Chester/Liberty and beyond... a better place for all!

It is exciting to see the enthusiasm of our donors as they open a fund and begin making a difference in our community and beyond. Some of the new funds directly benefit our community only; they include the Lakota Athletic Participation Fee Fund, Community Kids Fund, West Chester Library Support Fund and the Lakota Robotics Fund.

Of course, we continue to have those staid funds doing critical work in our area and beyond. The Angel Fund and Heroes' Fund assists families in financial crisis; the 3 Little Halos Fund is working to bring a "Safety Town" to our area; the initiative for a Boys & Girls Club in our area has formed a Steering Committee and the Bethany Slinger Flege Pancreatic Cancer Research & Awareness Fund is having a direct impact on research dollars in the Greater Cincinnati area. These great things are happening because of your vision and your support.

Remember, the Foundation is always here to assist you in your charitable thoughts. When you have a toothache you go to the dentist. When you want to be charitable, leave a legacy gift, wish to check out a charity or want assistance in developing an idea...you should call The Community Foundation. We work for you, the donor. Please use us as your resource.

During this holiday season, we wish you health and happiness and ask you to consider a gift to The Community Foundation during this Season of Giving.

Blessings to you and yours...

A handwritten signature in blue ink that reads "Patti".

Patti Alderson
Board Chair & CEO





Julia Feldmann was recently recognized for her outstanding community service by BakeMeHome, a charitable organization dedicated to promoting volunteerism and providing disadvantaged moms and kids with direct services that encourage shared family experiences. Julia was presented with a \$100 grant to the Community Kids Fund.

COMMUNITY KIDS FUND ESTABLISHED, WINS AWARD

When Julia Feldmann, age 10, saw what her mom, Kate Feldmann and grandma, Sandy Davis were doing with the Power of the Purse Fund, she wanted to get involved. And while, she was too young to participate in the Power of the Purse Fund, a giving circle that engages women to pool their dollars to make a larger impact, Julia thought, "Why couldn't I start my own giving circle for kids my age?" With that thought, the Community Kids Fund was established. Julia recruited her peers to join her on an Advisory Committee. Together, they created their mission to encourage 4th, 5th and 6th grade leaders to become actively involved in their community, fostering a lifetime commitment to service. The group planned and hosted their first fundraiser social, a "Minute-to-win-it" Ice Cream Social in October. Just like the Power of the Purse, the Community Kids Fund will engage youth and pool their resources to give grants to charities and initiatives assisting children and families in need.

THE COMMUNITY FOUNDATION OF WEST CHESTER LIBERTY AWARDS \$21,535 IN GRANT AWARDS

At the September 2011 Board Meeting of The Community Foundation's Board of Directors, \$21,535 was awarded to non-profit organization serving the communities of West Chester and Liberty. Receiving grant awards were:

St. Aloysius Orphanage — Pearson Project Formed as a collaboration between St. Aloysius, Lakota Schools and The West Chester Police Department, this program provides interventions to children and families to decrease the intense mental health needs as their children age and become reliant on adult services.

SELF — Project 2 Empower To provide support for the Project 2 Empower Program that provides tools and empowers low-income families in West Chester and Liberty Townships to become more self-sufficient.

The Christ Hospital — Project Heart ReStart To purchase defibrillator for the West Chester Library and provide CPR/training and education to staff and residents in our community

Save Haven Farms — Barn Renovation To support the renovation of their barn that will allow for adequate housing of goats, alpacas, sheep, etc. that are used to provide therapeutic programs to autistic adults and teens.

Transitional Living — Helping Hand To purchase a pool table, used ping pong table, basketball hoop and treadmill to provide health and fitness activities to their clients and residents who have been diagnosed with mental illness

Parachute — Support CASA Volunteers To provide training and support to Court Appointed Special Advocates (CASA) who advocate for the best interests of children who have been abused or neglected.

For more information about The Community Foundation of West Chester/Liberty's Grant Application Process, contact Melissa Benedict at 513-874-5450 or via email Melissa@welfoundation.com



Save Haven Farms

COMMUNITY SUPPORT LEADS TO RECORD BREAKING YEAR FOR KEY EVENT

On Saturday, September 17th, The Community Foundation of West Chester/Liberty hosted their 18th Annual Key Event raising a record breaking \$152,000. This premier event, presented by Aveda Fredric's Institute, Clark-Theders Insurance Agency, Inc., and North Ridge Realty Group, drew a sellout crowd of more than 550 people. Proceeds from the event benefit The Community Foundation's Operations and Community Grants Fund. The Community Grants Fund provides grant opportunities for area non-profits serving West Chester and Liberty Townships. In addition, 15 Community Foundation Fundholders received proceeds of the dollars generated by their donated item to the event's silent auction.

Under the direction of Key Event Chair, Gail Jackson-Miller, guests were treated to a cocktail party that included a live auction, silent auction, basket raffle and much, much more. Upon arrival at the cocktail party, couples were presented with a key that would later reveal their dining destination. At the close of the cocktail party, guests made their way to dinner



at one of the 28 area homes where hosts graciously welcomed their guests for dinner. Each home served between 16-32 guests and featured a premier chef from the Greater Cincinnati area. Each of the participating chefs' were provided with the same ingredients, but charged to prepare a delicious customized meal based on their individual talents and expertise. After dinner guests had the option of participating in an "After Party" at the home of Dick and Patti Alderson where they could dance the night away to the music of AOR.

A special thank you to all of our Sponsors, Host Homes, Chefs, Committee Members, In-Kind Donors, Volunteers and Attendees for making the event a huge success.

~SEE YOU AT NEXT YEAR'S KEY EVENT ON SEPTEMBER 15, 2012!~



SHAMROCK SHUFFLE

The Community Foundation is excited to once again join with the Union Centre Business Merchant Association to host our annual **Shamrock Shuffle 5K, 10K, Leprechaun Lap & Block Party** on Saturday, March 10th. Last year's event drew more than 3000 participants.

The 5K and 10K race will begin at 8:30AM and concludes at The Square @ Union Centre with a "Kegs and Eggs" breakfast and Block Party. At 9:30AM children ages 3-10 can participate in the Leprechaun Lap, a Children's Fun Run around The Square. A variety of sponsorship opportunities are available and details can be found at www.theshamrockshuffle.com or by calling Melissa Benedict at 513-874-5450.

The event also presents a unique opportunity for businesses, schools, non-profits or charitable organizations to raise funds for their favorite charity through the "Shamrock Gives Back" Program. Participants can build a team to raise funds to support their favorite charitable cause. Any school, non-profit, or community organization (i.e. sports team, booster, scouts program, that can be recognized as a non-profit) will have the opportunity to receive proceeds from The Shamrock Shuffle. For every 25 adult (two children equal one adult) team members participating in their Shamrock Shuffle Team, a \$250 grant will be made to the selected cause. Charity Registration Forms can be found on the Shamrock Shuffle website www.theshamrockshuffle.com and are due on January 31st. In 2011, more than \$10,200 was awarded to charities through the "Shuffle Gives Back" Program.



COMMUNITY GOLF CLASSIC

More than 200 golfers joined the sell-out crowd to support The Community Foundation at the 12th Annual West Chester/Liberty Community Golf Classic. The event, sponsored by our premier sponsors, Aveda Fredric's Institute, Clark-Theders Insurance Agency, Inc. and North Ridge Realty Group raised \$85,000. The event, hosted at Wetherington



and Four Bridges Golf & Country Clubs, was held under the direction of Jeff Newman and Dan Winterhalter and their team of volunteers. A special highlight of the day was the hole-in-one on Wetherington's 8th hole by Dave Combs. The ace won Dave a 2-year lease for a new Cadillac from contest sponsor Jeff Wyler Cadillac. Congrats, Dave!

Check out our refreshed website
www.wclfoundation.com

[facebook.com/wclfoundation](https://www.facebook.com/wclfoundation)



The Community Foundation is now on Facebook. Become a Facebook Fan of the Foundation and receive the latest news and updates.

FOUNDING FAMILIES

Dick & Patti Alderson
Greg & Sue Amend
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Shiver Security Systems
Skidmore Sales & Distributing
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United Group Services

ANNIVERSARY 80 FAMILIES

The Community Foundation would like to thank the following families for their Anniversary 80 support. Each family has made a \$25,000 commitment to the future of our community by supporting the Foundation's Forever Fund.

James & Chris Cartledge
Marty Davis
Red & Jo Deluse
Sam & Becky Harris
Robert & Donna Leslie
Myron & Tommie Rowland
Cliff & Sig Ryan
William & Lynne Schumacker
Greg & Diane Stamp
Craig & Cynthia Tate
Nancy Terry
Randy & Patty Terry
Ron & Kathy Wegmann
Fritz & Julie White
Tom & Judy Zenge

CELEBRATE NATIONAL

The Community Foundation was founded by your friends and neighbors in the communities of West Chester & Liberty Townships. Together, we are working with our generous community-minded residents to meet the many needs of our area. Dollars raised work to keep the community strong for generations to come.



Who Gives? YOU! The Community Foundation is pleased to have a diverse donor base of individuals, families, businesses, nonprofit organizations and private foundations.

What Can We Give? Donors provide a donation to the Community Foundation through cash, stocks, appreciated property, insurance or bequests. All gifts are tax-deductible to the fullest extent of the law. Gifts can be made to any of the Foundation's Charitable Funds or; You can create your own Charitable Fund to maximize your giving, today!

Together we are the
HEART of our Community.



PHILANTHROPY MONTH



How Can We Give? It is easy! Many have selected The Community Foundation as its charitable umbrella to meet their charitable goals and dreams. The Foundation's experienced staff will work to customize a charitable fund that best meets your interests or they can assist in directing you to established funds that are most important to you. Don't forget about the Community Foundation in your estate plans! Consider making a planned gift and leave a legacy, today!

Contact the Community Foundation at 513-874-5450 or visit our website at www.wclfoundation.com to learn more about how you can get involved!



Foundation Board-Directed Funds Working in our Community:

Angel Fund • Community Grantmaking Fund
Heroes' Fund • Kids2Kamp Fund • Power of the Purse Fund • Youth In Philanthropy Fund
Contact us today to learn more about these or our other 120+ charitable funds.

WHY A COMMUNITY FOUNDATION? CONTROL.

You have worked hard to have a nest egg for your charitable dollars. You have spent many hours thinking about the difference they could make... who you want to benefit and how you want your dollars to be used. You want to make very sure that your charitable wishes are carried out....whether you are alive or deceased.

Whether your donation is \$5,000 or \$5B, everyone wants to make certain their charitable intent is carried through. How can you make sure? Choose to give your gift through The Community Foundation.

Take a moment to consider these real life scenarios:

- Bill Gates... needs no introduction. He is the ultimate “wise donor.” Therefore, when he wanted to give an \$8M gift to support United Way, he gave the gift through a designated Fund established at The Seattle Community Foundation. By using the Community Foundation, he assured that the United Way was going to use his gift for the purposes he designated. The Community Foundation only releases dollars that fulfill the donor’s intent.
- Larry Smith (an alias) had tirelessly volunteered for the local chapter of the American Red Cross in NoTown, USA. Mr. Smith believed in the organization and decided to leave a significant portion of his estate to this group through his will. The local chapter in NoTown knew of the donation, and upon his death they were in contact with the executor. However, quite unexpectedly, the National American Red Cross moved in and said that donation was left to them. National won in court leaving the local chapter with nothing. If only, Mr. Smith had set up a Fund at The Community Foundation (TCF) to benefit the NoTown Chapter of the American Red Cross and funded it upon his death! His dollars would have rolled into this fund and the local chapter would have been able to use his gift as he had intended... hands off National! (This is a true story that occurred in OH)
- Everyone is familiar with the recent \$100M donation from Facebook founder Mark Zuckerberg to Newark, NJ Schools. However, the rest of the story is that the Billionaire funded his \$100 million commitment to Newark, N.J. schools by donating stock to a supporting organization at the Silicon Valley Community Foundation, a public charity. This allowed Zuckerberg to take a full tax-deduction on his gift and provide some parameters on goals that the school system must make to receive contributions.

Regardless of the amount of your gift, The Community Foundation is here to advocate for YOU the donor...to make sure your charitable dollars are used for the purpose you intended. We can do this through Your Fund set up to benefit a charity in another state, a scholarship to your college in CA or to carry out a specific mission right in your own back yard.

Come in and talk to us about your charitable wishes. We are here to make certain your dreams come true!

CHARACTER OF THE MONTH: CONTENTMENT

"Realizing that true happiness does not depend on material conditions."

Action Steps:

- * Be thankful for what I do have
- * Not complain about what I don't have
- * Not always ask for "one more"
- * Value people above things
- * Want less and give more

The Community Foundation supports the efforts of the Character Council by showcasing their Character of the Month.

Learn more at www.charactercincinnati.org

SPONSORS

The Community Foundation would like to thank the following attorneys, estate planners, bankers, financial Managers and accountants for their sponsorship of the Fall Newsletter.



FLYNN & COMPANY, INC.

Richard Flynn, CPA, President

513-530-9200

rflynn@flynncoepa.com

Founded in 1994, Flynn & Company is a full service certified public accounting firm specializing in tax preparation & planning, accounting & auditing and business advisory services. We are committed to assisting small and mid-sized businesses and individuals achieve financial success by executing innovative and practical solutions.



FIFTH THIRD PRIVATE BANK

Melody Lusby, Vice President and Private Banker

513-603-1543

Melody.Lusby@53.com

With success and affluence comes an equally high level of financial complexity. This is especially true as you look to plan for your future and ensure your legacy for both you and your family. At Fifth Third Private Bank, we believe your financial complexity can be simplified. But it requires a personalized team of talented, dedicated and passionate professionals who can work together to collaborate with you in order to help you achieve your goals. And we believe the key to reaching true and lasting financial contentment is having a clear and achievable plan.



SEBALY SHILLITO + DYER

Michael P. Moloney, Managing Partner

513-644-8125

937-222-2055

mmoloney@ssdlaw.com

The SS+D Financial difference comes from its unique background and client approach. The ancillary relationship with one of the area's most respected law firms, Sebaly Shillito + Dyer, enables SS+D Financial to combine a broad and deep expertise in legal and financial planning. SS+D Financial sells only advice and client service – not products – continuing its tradition of always putting clients' interests first.



THOMAS B. HOLDING, CFP®, CRPC®, CLU, ADVISOR REPRESENTATIVE

Lincoln Financial Advisors/Sagemark Consulting

513-942-4410

Thomas.Holding@LFG.com

Thomas B. Holding, CFP®, CRPC®, CLU is a Certified Financial Planning Practitioner with Lincoln Financial advisors. Tom has over 25 years of experience specializing in financial planning for retirees, widows, business owners and executives. He is a Past-President of the Financial Planning Association (FPA) of Greater Cincinnati and is on the Boards of both the Chamber Alliance of West Chester/Liberty and the Community Foundation of West Chester Liberty.



PATRICK T. NESBITT

513-755-2600

pnesbitt@pnesbitt.com

Patrick is an attorney who has served greater Cincinnati area business owners since 1981, handling all manner of transaction and operational legal needs for both the business and for its owners as individuals. His wills, trusts and estates work often have charitable planning aspects, such as using The Community Foundation's donor advised funds as a substitute for creating a private foundation. Patrick is a sole practitioner located here in West Chester.



CUNI, FERGUSON & LEVAY CO., L.P.A.

Helen Fanz LeVay, Esq.

513-771-6768

HLeVay@cfl-law.com

Helen Fanz LeVay, Esq. has over 25 years legal experience and her practice focuses exclusively on estate planning, probate and trust administration, estate and trust taxation, real estate, philanthropy and charitable giving. Helen is partner with Cuni, Ferguson and LeVay, Co., LPA, one of the most well respected small law firms in the greater Cincinnati area, as well as a member of the Ohio State Bar Association, Cincinnati Bar Association (Estate Planning and Elder Law Committees) and the Cincinnati Estate Planning Council. Helen is a member of The Community Foundation's Board and resides in West Chester with her three sons and husband, Joe.



MILLIKIN & FITTON LAW FIRM

513.336.6363

www.mfitton.com

Sitting: Sarah Reister, John Reister, William Keck, Catherine Evans; Standing: Jon Whalen, Sarah Worley, Jeff Rulon, Heather Sanderson Lewis, James Michael, Paul Franke, Thomas Dierling, Salvatore Gilene and Steve Tooman.

Founded in 1840 and the oldest law firm in Butler County, Millikin & Fitton Law Firm offers a full-range of legal services for individuals, families, business and local government

entities. Our attorneys maintain the firm's tradition of providing exceptional legal services while using creative problem solving and technology to enhance efficiency and service to our clients.



HUNTINGTON BANK

William Schumacker

Private Financial Group, Region Manager

513-366-3081

William.Schumacker@huntington.com

William "Bill" has been in banking for 30+ years. Currently with Huntington Bank, Bill manages the Cincinnati (Southern Ohio/ Northern Kentucky) Wealth Advisors office located at the Rookwood Tower. Bill's responsibilities include having the Personal Trust, Portfolio Management, Private Banking, and Wealth Brokerage areas reporting to him. Bill assists clients in their investment management and wealth planning for the their families.



JAMES H. SMITH III, ESQ.

Lindhorst & Dreidame

513-345-5767

jsmith@lindhorstlaw.com

Practicing primarily in taxation, estate planning, corporate and real estate law. Mr. Smith has worked extensively in the West Chester/Liberty area on numerous tax, corporate and real estate transactions.

SCHOLARSHIP APPLICATIONS TO BE RELEASED IN JANUARY

The Community Foundation of West Chester/Liberty is honored to offer a variety of scholarship opportunities to students looking to further their education. Information on 2012 opportunities will be announced in mid-January. Be sure to check the Foundation's website www.welfoundation.com for the 2012 application and all available opportunities.

WALKING WITH ANGELS A SUCCESS



On August 20th, hundreds came out to support the "Walking with Angels" event at the Voice of America Park. The walk raises money to support the Jessica Ann Siegel Scholarship Fund. The Fund, created in 2007, presents a \$2,000 scholarship award to a Lakota East High School Graduate each year.

FUNDS RAISED FOR PANCREATIC CANCER RESEARCH



On October 31, Becky Wilber of CTI Restaurants presented a check in the amount of \$2,000 to support the Bethany Siningher Fledge Pancreatic Cancer Research & Awareness Fund held at The Community Foundation. Donations were raised by customers at the newly opened Taco Bell in the UC Tangeman Food Court. Pictured left to right are: Lauren McCorkle, Dr. Syed Ahmad, Susan Pavlech and Becky Wilber.

HOLIDAY OPEN HOUSE

Save-the-Date! Make plans to join us to celebrate the 2011 Holiday Season and the success of the Community Foundation at our Holiday Open House on Thursday, December 1st from 5:00PM-7:30PM. RSVP to Sue@wclfoundation.com or by calling 874-5450.

Holiday Checklist

- ✓ Holiday cookies baked
- ✓ Holiday cards mailed
- ✓ Shopping done
- ✓ Presents wrapped
- ✓ Help others in need by making a donation to my Community Foundation

Happy Holiday's
From Your Friends at
The Community Foundation
of West Chester/Liberty

Please consider giving a gift to **The Community Foundation** this holiday season. Together, we are working to meet the needs of our area. Help make our community strong for generations to come. All gifts are tax-deductible.

Get Involved!
Contact: The Community Foundation at
513-874-5450
or visit our website
www.wclfoundation.com

community foundation
WEST CHESTER • LIBERTY
Be a Part of the Community

BOB LAWHORN GOLF OUTING

More than 100 friends and family of Bob Lawhorn hit the links on Monday, October 10th to raise Funds for the Bob Lawhorn Education Fund. The Fund, established in Bob's name, awards a full tuition scholarship to a graduate of Norwood High School to attend the University of Cincinnati. To date, more than 140,000 has been awarded to Norwood High School graduates.



POWER OF THE PURSE TO RECOGNIZE 2011 GRANT RECIPIENTS

On November 29th, the Power of the Purse (POP) Fund will award grant dollars to three organizations at their annual Grant Gala. In 2011, more than 115 members joined the giving circle that provides grant dollars to organizations engaged to programs that support issues that are important to women and girls. Members contribute \$100 annually. By pooling their resources with other POP Members, their gift is able to make a larger impact. POP Members review proposals submitted by non-profit organizations and through a voting process determine what organization/s

to support. This year, more than \$10,000 in grant awards will be given to St. Joseph's Orphanage, American Heritage Girls and Atrium Medical Center.



A membership drive for 2012 was held in September at the home of Patti Alderson. Yelton's Fine Jeweler generously supported the Power of the Purse Fund by presenting every lady who joined that evening with a \$20 gift certificate to their store. At this meeting, members heard presentations from area non-profit organizations about their proposals. If you would like to become a 2012 member of the Power of the Purse, submit your \$100 due payment to the Community Foundation or call the Foundation for details.

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SAVE-THE-DATES



December 1, 2011
Holiday Open House

March 10, 2012
Shamrock Shuffle

March 30, 2012
Scholarship Application Deadline*

April 19, 2012
Annual Dinner Celebration

August 6, 2012
Community Golf Classic

September 15, 2012
Key Event

LAKOTA ATHLETIC PARTICIPATION FEE FUND TO HELP FAMILIES WITH COST OF ATHLETICS

Thanks to a private donor, Lakota families looking for assistance with their children's athletic fees now have the opportunity to apply for assistance. A new Fund held at The Community Foundation has been established to cover half of the athletic fee assessed to students participating in sports within Lakota Schools.

This scholarship opportunity is for Junior and Senior High students. Families interested in submitting an application for consideration must submit a letter to The Community Foundation of West Chester/Liberty indicating their desire for assistance. The letter should include a rationalization and insight into the family's hardship, the benefit the students will receive from athletic participation and insight into the family's ability to cover half of the athletic fee charged to the student. Applications will be reviewed by a selection committee of West Chester and Liberty Township residents. Anyone in the community who has an interest in supporting this effort is encouraged to make a tax-deductible donation to the Lakota Athletic Participation Fee Fund. Any donation amount is appreciated. Scholarships in the amount of \$175 are awarded to Junior High Students and Senior High Students receive \$275.

A limited number of scholarships are available. Only one scholarship per student will be awarded in a school year. For more information contact Melissa Benedict at Melissa@wclfoundation.com