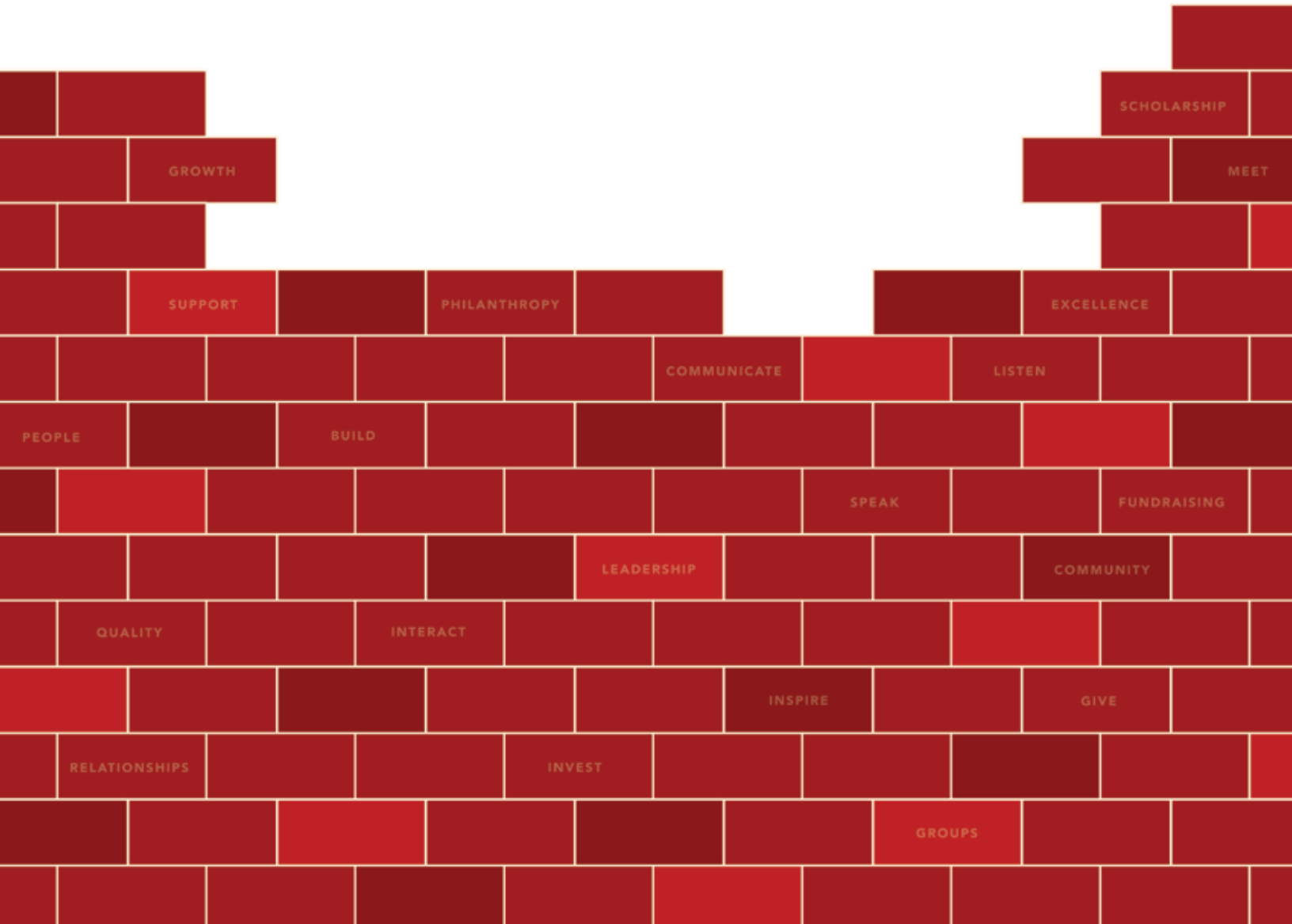




2016 ANNUAL REPORT

# BUILDING FOR THE FUTURE



# DEAR FRIENDS

In 2015 the Community Foundation board and staff went through a strategic planning process to define organizational goals and ensure we are executing our mission to “encourage, support and facilitate philanthropy” effectively. Our long-term goal is to increase our grants to organizations serving the West Chester/Liberty community to \$1M per year. We identified several areas of opportunity to help us reach that goal and increase our overall impact. Much of 2016 was spent working behind the scenes to review policies and plan our focus. We are excited for the next chapter, and look forward to sharing this journey with you throughout the coming year as we build for the future of our community.

Last year, as part of our strategic plan, we initiated a Community Needs Assessment to determine the areas of concern in the region where philanthropy could make a meaningful impact. A Community Summit was held in December 2016 to engage community leaders in discussion about the issues facing West Chester and Liberty Township. The preliminary themes that surfaced during the summit were transportation/accessibility, education, and workforce development. These themes are being refined with research and interviews. The result of this process will equip the Foundation with a thoughtful, data-driven report to guide our grant dollars and assist donors who wish to support the West Chester/Liberty community.

While we take steps to build for the future, the most integral piece of the puzzle will be the completion of our Forever Fund Operating Endowment. A fully-funded operating endowment ensures the Community Foundation will be here for future generations, and allows every dollar raised at events like The Shamrock Shuffle and Key Event to go right back out into the community through our Community Grants Fund. Please consider joining us as a Forever Fund Donor. Your gift helps build a sustainable source of funding for a vibrant community.

The Community Foundation of West Chester/Liberty strives to be the resource for local philanthropy operating with a focus on our community, a promise of good stewardship of your charitable dollars, and a purpose to make an impact in the lives of our neighbors.

Thank you for your continued support.

Gratefully,



*Ian Murray*

**Ian Murray**  
Board Chair



*Erin Clemons*

**Erin Clemons**  
President & CEO

# GRANTS

The Foundation is committed to improving the community through grants awarded from our Community Grants Fund. Support for this fund is provided by the income generated at the Foundation's fundraising events - The Key Event, Shamrock Shuffle and Community Golf Classic. Donors who participate in these events make it possible for the Foundation's Board of Directors, with assistance from the Grants Committee, to distribute these funds to deserving nonprofit organizations serving our community. The Community Foundation is also building a Community Grants Endowment to ensure the diverse needs of the community will be met for future generations.

**More than \$100,000 was awarded to the following organizations in 2016.**



### **WMKV Maple Knoll Communities Inc.**

*Listen Up, Lakota! radio programming*

### **Cancer Family Care**

*School-based counseling for students & families at Lakota dealing with a cancer diagnosis*

### **City Gospel Mission**

*Whiz Kids Tutoring & Mentoring for low-income students at Lakota Schools*

### **Center for Family Solutions**

*Express Yourself programming at Lakota Schools*

### **Miami University/Greater Miami Valley YMCA**

*Online degree program for pre-kindergarten educators*

### **Atrium Medical Center Foundation**

*Creation of a bereavement room for families of patients*

### **Supports to Encourage Low-Income Families (SELF)**

*Jobs Now! skills-building course for low-income individuals to obtain employment*



### **Homeless Animal Rescue Team (HART)**

*Veterinary care for rescued animals*

### **PARACHUTE Butler County CASA**

*Training & recruitment for volunteer child advocates*

### **Cancer Support Community**

*Support programming for cancer patients and their families in West Chester & Liberty Township*

### **Young Life Capernaum**

*Day camp for individuals with disabilities*

### **One Way Farm Children's Home, Inc.**

*Operating support for food, clothing, and activities for the residents of One Way Farm*



### **Axis/EDGE Teen Center**

*Community service program*

### **Hannah's Treasure Chest**

*Care packages of necessities, books, clothing, and toys for low-income children.*

### **Military Veteran's Resource Center**

*Mental health counseling for veterans and active duty military in West Chester and Liberty Township*

### **Shared Harvest Food Bank**

*Weekly Food Bag Program at Lakota Schools*

### **Big Brothers Big Sisters of Butler County**

*Mentoring Program at Woodland Elementary*

### **Junior Achievement/OKI Partners**

*Programming at Lakota Schools*

### **Caring Community Collaborative (C3)**

*Operating and programming for Hunger Initiative, Veterans Support, and Mental Health*

### **American Diabetes Association**

*ADA Diabetes Summer Camp for children living with diabetes*

### **Down Syndrome Association of Greater Cincinnati**

*Training for healthcare professionals interacting with families of babies with Down Syndrome*

### **Lakota Local Schools**

*ID Anti-Bullying Project in all four Lakota Junior High Schools*

### **Hope House Mission**

*Emergency shelter for women and children*

### **The Dragonfly Foundation**

*Christmas Adopt-a-Family to assist families with children undergoing cancer treatment*



### **People Working Cooperatively**

*Emergency home repairs for low-income residents of West Chester and Liberty Township*

### **Reach Out Lakota**

*Food and clothing pantry purchases to supplement donations*

# FOREVER FUND ENDOWMENT CAMPAIGN

The Foundation's work in the community would not be possible without the support of our biggest advocates, our Forever Fund Donors. These families and businesses understand the positive impact charitable dollars make in our community. By supporting the Forever Fund Campaign, they are securing a sustainable community foundation.

Currently, we have reached \$3.7 Million of our \$5 Million goal. **How can you contribute?**

## MAKE A PLEDGE

Forever Fund Families make a \$25,000 pledge, payable over 5 years, to help secure the financial future of the Foundation.

## BECOME A FOUNDING BUSINESS

Founding Businesses invest charitable dollars in the Forever Fund to improve the community where their employees live and work.

## DONATE

As always, the Community Foundation values gifts of any amount to support the Forever Fund Endowment.



*Pictured: Jonathan & Heather Theders, and Bob & Jo Hutsenpiller.*



*Pictured: Lynne & Bill Schumacker.*

# FOREVER FUND

For a complete list of Community Foundation donors, please visit our website.

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## Founding Families (\$25,000)

Dick & Patti Alderson  
Greg & Sue Amend  
The Benhase Family  
Steve & Linda Binder  
John & Deborah Boehner  
Larry & Sandra Brueshaber  
Ed & Ruth Carey  
Mark & Karen Carnahan  
Charles & Barbara Chappell  
Dick & Phyllis Clarke  
Red & Jo Deluse Family

Bob & Jo Hutspeniller Family  
Calvin & Judy Johnson  
Otto & Gayle Keeton  
Betty Kromer & Susan Kromer  
Hunt Family  
George & Debra Lang  
Bob & Lew Ann Lawhorn  
Tom & Barb Lutz  
Bill & Jennifer Marquet  
Mary & Megan McConnell  
Joe & Sue Meyer

Larry & Susan Morgan  
Carl & Denise Renneker  
Jim Schmalz & Family  
Maria Schrudder  
Mitchell Schrudder  
Larry & Mary Schumacher  
John & Bitsy Shaffner  
Jonathan & Heather Theders  
The Todd Family  
Chris & Sandie Wunnenberg

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## Forever Fund Donors (\$25,000)

Joe Busam-Kelly Family Fund  
James & Chris Cartledge  
Dave Bruno & Rep. Margy Conditt  
Dave & Jan Cook  
Don & Susan Crain  
Marty Davis  
Red & Jo Deluse  
Daryl & Tammy Demo  
Sam & Becky Harris

Frederic & Julie Holzberger  
Robert & Donna Leslie  
Bill & Jenny McCloy  
Drs. Anil & Chetna Mital  
Myron & Tommie Rowland  
Cliff & Sig Ryan  
Bill & Lynn Schumacker  
Jeff & Juli Smith  
Greg & Diane Stamp

Craig & Cynthia Tate  
Nancy Terry  
Randy & Patty Terry  
Phil & Anita Weeda  
Ron & Kathy Wegmann  
Fritz & Julie White  
Tom & Judy Zenge

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## Founding Businesses

### Charter Level (\$100,000)

AK Steel Corporation  
Alderson Properties  
Amylin Pharmaceuticals

BAE Systems  
Huntington Bank  
North Ridge Realty Group

OK Interiors Corporation  
Pierre Foods

---

### Founder Level (\$60,000)

Larry & Sandy Brueshaber  
First Financial Bank  
Flynn & Company PSC, Inc.  
Ford Development Corporation  
GMZ, Inc.  
Haglage Construction  
Hutspeniller Contractors, Inc.

Kleingers & Associates, Inc.  
The Lang Agency  
Mercedes Benz of West Chester  
Planes Moving & Storage West  
Chester  
Republic Wire, Inc.  
RiskSOURCE Clark-Theders

Schumacher Dugan Construction  
Shiver Security Systems  
Skidmore Sales and Distributing  
Co, Inc.  
Tri-County Heating & Cooling  
United Group Services

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### Leadership Level (\$30,000)

Clarke Services

CTI Restaurants, Inc.

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### Partnership Level (\$5,000-\$25,000)

Cintas Corporation  
First Title Agency, Inc.

Great Traditions Land &  
Development Co.  
Jay Mar Cole, LLC

National City Bank  
US Bank  
West Chester 75

## DONOR FUNDS

8 Paws Charitable Fund  
 AGAPE's Benevolent Fund  
 AGAPE Legacy Fund  
 Dr. Masood and Shakila Ahmad  
 Scholarship Fund  
 AK Steel Charitable Fund  
 Dick & Patti Alderson Family  
 Fund  
 Allen Park Fund  
 Amylin Pharmaceuticals Fund  
 Angel Fund  
 Anthony's Army Fund  
 Arter Legacy Fund  
 Ashley's Fund  
 Atrium Medical Center Fund  
 for Community Health &  
 Wellness Fund  
 Kyle Babcock Scholarship Fund  
 BAE Systems, Inc. Fund  
**Sherry Baker and John Arthur  
 Dahman Charitable Fund**  
 Butler County Republican  
 Women's Club Scholarship Fund  
 The Benhase Family Fund  
 Boys & Girls Club of West  
 Chester/Liberty Fund  
 Bicycle Recycle Fund  
 John Boehner Education Fund  
 Douglas Brueshaber Memorial  
 Fund  
 Brueshaber Family Fund  
 Julia Ellen Burnett Scholarship  
 Fund  
 Edmund C. Carey Scholarship  
 Fund

Caring Like Karen Fund  
 Carnahan Fund  
 Carnahan Family Fund  
 Phyllis and Dick Clarke Family  
 Fund  
 RiskSOURCE Clark-Theders  
 Insurance Agency Fund  
 Community Grants Fund  
 Companions on a Journey Grief  
 Support Fund  
 Community Foundation  
 Scholarship Fund  
 Vicki Curtis Fund for Students  
 and Teaching Excellence  
 Davis-Wendell Family Fund  
 Jordan Day Scholarship Fund  
 Linda Marie Degenhart  
 Forevermore Fund  
 Deluse Family Fund  
 DeMois Family Scholarship Fund  
 Robert and Gretchen Dinerman  
 Charitable Fund  
**Diversity 101 Fund**  
 George & Marion Dorin Fund  
 for the Blind  
 Harold Draut Scholarship Fund  
 Thomas Dunlap Scholarship Fund  
 Eastside Angels Fund  
 Fabian Family Charitable Fund  
 Families Living with Diabetes Fund  
**Family Promise of Butler  
 County Fund**  
 Ben Feazel Memorial Scholarship  
 Fund

Friends of Liberty Parks &  
 Recreation Fund  
 Flynn and Company Scholarship  
 Fund  
 Flynn and Company Inc. Fund  
 Fore Kids Golf Charity Fund  
 Forever Fund  
 Free Throws for Kids Fund  
 GIVE HOPE Pancreatic Cancer  
 Research & Awareness Fund  
 GMZ, Inc. Fund  
 Haglage Construction Fund  
 Heart Start Fund  
 Susan C. Hendel Scholarship  
 Fund  
 Heroes Fund  
**Hoody Memorial Scholarship  
 Fund**  
 Humphreys Family Fund  
 Huntington Bank Fund  
 iSqFt Community Outreach Fund  
 Izaak Walton League, Cincinnati  
 Chapter Fund  
 Jack and Jill Fund  
 Jess's Fund  
 Craig Jones Memorial Scholarship  
 Fund  
 Julia's Angel Fund  
 Kids2Kamp Fund  
 Kleingers Group, Inc. Fund  
 Kromer-Pavlech-Hunt Family  
 Fund  
 Kyle's Fund to benefit St. Peter  
 and Paul Academy of Reading,  
 OH  
 Warren and Patricia Lambeck  
 Charitable Fund  
 Alicia Esther Lang Memorial  
 Scholarship Fund  
 Lakota Athletic Participation  
 Fee Fund  
 Bob Lawhorn Education Fund  
 Marvin R. Lawson Scholarship  
 Fund  
 Greg Lemmel Scholarship Fund  
 Rob and Debbie Lemmons  
 Charitable Fund  
 Leo Johnson Memorial Fund  
 Lakota East Spark Fund  
 Lakota F.I.E.L.D.S Fund  
 Lakota Fund  
**Liberty Center Foundation Fund**  
 Liberty Township Charitable Fund  
 Liberty Township Parks Fund  
 LIFT Fund  
 Lillian's Legacy Fund  
**Linkinnati Community Fund**

### Donor Highlight: Free Throws for Kids Fund



The Free Throws for Kids Fund was established at the Community Foundation in 2014 by Mark and Sarah Johnston. Their mission is to help make life a little easier for the young patients at Cincinnati Children's Hospital and their families by addressing some basic needs: toiletries, meals, gas cards, and more. During a difficult time, often away from home spending nights at the hospital, these simple things can feel like a burden to a parent whose child is sick. Free Throws for Kids prepares and delivers hundreds of care packages to these families every year, each one containing a fun book or stuffed toy for the child. In 2016, the Free Throws for Kids annual fundraising event hosted 389 free-throw shooters on 59 teams, and raised more than \$123,000 in support of FTFK's mission. In addition to the care packages, FTFK also purchased and maintains a salad bar for the kitchen at Ronald McDonald House for families staying there while a child is being treated at Cincinnati Children's Hospital.

Lakota Robotics Fund  
 Lakota Sports Organization Fund  
 Lungs on the Run Fund  
 McCloy Family Foundation  
 Mercedes Benz of West Chester  
 Fund  
 Leadership 21 Class of 2016  
 Fund  
 Glen E. Mieling Memorial  
 Scholarship Fund  
 Karen Moeller Memorial  
 Scholarship Fund  
 Mother Teresa Catholic  
 Elementary School Endowment  
 Fund  
 MVD Communications Fund  
 Nixon-Peters Family Fund  
 One Way Farm Children's Home  
 Fund  
 Harold and Glenda Painter  
 Charitable Fund  
 PARACHUTE: Butler County  
 CASA Fund  
 Partners in Prime Fund  
 PAWS Animal Adoption Center  
 Fund  
 PAWS - New Building Fund  
**Logan Pence Memorial  
 Scholarship Fund**  
 Pete's List of Excellence  
 Scholarship Fund  
 Pets Helping People Fund  
 Planes Moving and Storage Fund  
 Power of the Purse Fund  
 Kristin Renneker Scholarship  
 Fund  
 William and Marilyn Richardson  
 Charitable Fund  
 RMP Family Fund  
 Reach Out Lakota Fund  
 Ron and Teresa Rosenbeck  
 Family Fund  
 Rotary Club of West Chester  
 Liberty Fund  
 Art and Dorothy Roth Family  
 Fund  
 Stanley D. Rullman Fund  
 Patrick W. Ryan Fund  
 Sassy's Friends Fund  
 Schramm Family Fund  
 Karen M. Schroeder Memorial  
 Scholarship Fund  
 Schumacher Dugan Fund  
 Supports to Encourage Low-  
 Income Families Fund  
 Shiver Security Systems, Inc.  
 Fund

**Donor Highlight:  
 West Chester  
 Township Senior  
 Van Fund**



*The West Chester Senior Van Transportation Service is a mostly volunteer-operated public-private partnership between West Chester Township and Hillandale Communities. The service takes clients to doctor's appointments, the grocery store, pharmacy, and for recreational and social gatherings. In 2011 BAE Systems established the West Chester Township Senior Van Fund at the Community Foundation for vehicle purchase/service and operating costs of the service. Through this fund, the Community Foundation was able to facilitate the purchase of a new van with a \$25,000 grant in 2016.*

Jessica Ann Siegel Scholarship  
 Rob and Maelyn Siegmann Fund  
 Skidmore Sales & Distributing  
 Co., Inc. Fund  
 Shayna Smith Scholarship Fund  
 Zach Smith Memorial Fund  
 Gregory Snyder Coda  
 Scholarship Fund  
**Sosna Family Fund**  
 Dana Spangler Memorial  
 Scholarship Fund  
 Square at Union Centre Fund  
 Howard and Judith Stalford  
 Charitable Fund  
 Greg and Diane Stamp Family  
 Fund  
 William A. and LaVerne R.  
 Stautberg Endowment Fund  
 Greg and Diane Stevens Fund  
 Stock Family Fund  
 3 little Halos Fund  
 Traveler Assistance Fund  
 Total Wealth Planning Charitable  
 Fund  
 Union Centre Business Merchant  
 Association Fund  
 United Group Services Fund  
 Butler County United Way  
 Legacy Fund  
 Mark Vaccariello Memorial  
 Scholarship Fund  
 Jennifer Verkamp Charitable  
 Fund  
 Voice of America MetroParks  
 Program Fund  
 National Voice of America  
 Museum of Broadcasting Fund  
 Robert C. Wasson Memorial  
 Fund  
 The Art Fund

WC Baseball Complex  
 Sustaining Capital Real  
 Property Fund  
 West Chester Citizen Police  
 Academy Alumni Association  
 Fund  
 West Chester Union Township  
 Historical Society Fund  
 West Chester Hospital  
 Charitable Fund  
 West Chester Hospital  
 Scholarship Fund  
 MidPointe Library West Chester  
 Support Fund  
 West Chester Parks Fund  
 West Chester Rotary Foundation  
 Fund  
 West Chester Township Senior  
 Van Transportation Fund  
 West Chester Christmas Walk  
 Fund  
 F & J White Charitable Fund  
 Aaron Wietzel Fund  
 David and Dina Wilder Fund  
 Winterman Resiliency  
 Scholarship Fund  
 Wipperman Family Fund  
 The Wishing Well Project Fund  
 Women's Fund  
 Woodmansee Cemetery Fund  
 Roy H. Yelton Memorial  
 Scholarship Fund  
 Youth in Philanthropy Fund  
 Thomas and Kathryn Youket  
 Fund  
 Ezekiel "Zeke" Stepaniak  
 Memorial Scholarship Fund  
 Tom and Judy Zenge Fund

■ = NEW FUNDS in 2016

# SCHOLARSHIPS

The Community Foundation of West Chester/Liberty offers scholarship opportunities for students seeking to further their education. Donors who have created scholarship funds at the Foundation recognize that supporting the education of our students helps build future of our community. Scholarships are available to graduating seniors headed for college, students at local parochial schools, and non-traditional students returning to learn a new skill or begin a new career. Each application is reviewed by a selection committee and recipients are chosen based on criteria established by the donor.



## The Community Foundation awarded more than \$80,000 in scholarship funds in 2016.

**Dr. Masood & Shakila Ahmad Scholarship**  
Dana Hanieh

**Alicia Esther Lang Memorial Scholarship**  
Kavanaugh McCarthy  
Sydney Rader *(in memory of Marian Stabler Breiholtz - Lakota '64)*

**Bob Lawhorn Education Fund**  
Victoria Armstrong

**Community Foundation of West Chester/Liberty Scholarship**  
Samantha Botkin  
Delainey Huck

**Dana Spangler Scholarship**  
Sydney Rader

**Gregory Snyder Coda Scholarship**  
Quentin Craycraft

**Harold Draut Scholarship**  
Jackson Welch

**Jessica Siegel Scholarship**  
Michael Reimer

**Julia Ellen Burnett Scholarship**  
Bailey Plummer

**Karen Moeller Memorial Scholarship**  
Kristen Horn  
Evelyn Proffit  
Rachel Yockey *(in memory of Marian Stabler Breiholtz - Lakota '64)*

**Kristin Renneker Memorial Scholarship**  
Lauren McKearin  
Kelly McManus

**Kyle Babcock Scholarship**  
Julia Popson

**Greg Lemmel Memorial Scholarship**  
Darcey McAneny

**Marvin R. Lawson Scholarship**  
Caitlyn Kirchoff

**Pete's List of Excellence in History & Government Scholarship**  
Shane Harris  
Mikayla Bogan

**Roy H. Yelton Scholarship**  
Bailey Plummer

**Shayna Smith Scholarship**  
Erika Lindner

**West Chester Hospital Scholarship**  
Juilan Havens  
Siddarth Srinivasan



# EVENTS

## Encouraging Philanthropy by Bringing the Community Together

One important way that the Community Foundation works to encourage philanthropy is by providing opportunities for people to come together in support of a common cause. Our fundraisers - the Key Event, Golf Classic and Shamrock Shuffle - provide avenues to charitable giving accessible to everyone in the community. Thanks to the generosity of sponsors, donors, volunteers and attendees, these events raised more than \$270,000 in 2016 to support the Community Grants Fund, local nonprofit organizations, and operations of the Community Foundation.

### 23<sup>RD</sup> ANNUAL KEY EVENT

- Raised \$133,000
- 550 guests & 21 premier Cincinnati-area chefs joined us for this signature Community Foundation event.
- Key Event Chair: Linda Lack



### 17<sup>TH</sup> ANNUAL COMMUNITY GOLF CLASSIC

- Raised \$57,000
- More than 200 golfers participated in the 17th annual Golf Classic, held each year on the first Monday in August.
- Golf Classic Chairs: Trevor Lemmel, Dan Brinkmann & Scott Jones
- Event Volunteer: Virgil McCullough



### 10<sup>TH</sup> ANNUAL SHAMROCK SHUFFLE

- Raised \$81,000, with \$26,000 distributed to more than 50 charity teams through the Shuffle Give Back Program.
- 4200 participants came together to support the community and raise dollars for causes close to their hearts.
- Awarded "Best Charity Race" by Cincy Magazine for 4 consecutive years.
- Shamrock Shuffle Chair: Shellie Leder



# FINANCIAL

DECEMBER 31, 2016 and 2015

Assets	2016	2015
Cash and cash equivalents	\$ 262,929	198,473
Pledges receivable, net	50,691	134,218
Contributed rent receivable, net	189,596	247,432
Investments	14,250,575	12,963,965
Furniture and equipment, net	467	817
<b>Total Assets</b>	<b>\$ 14,754,258</b>	<b>13,544,905</b>
Liabilities and Net Assets		
Accounts payable and accrued liabilities	\$ -	-
<b>Net Assets</b>		
Unrestricted	14,513,971	13,163,255
Temporarily restricted	240,287	381,650
Total net assets	14,754,258	13,544,905
<b>Total Liabilities and Net Assets</b>	<b>\$ 14,754,258</b>	<b>13,544,905</b>

2016 Independent audit performed by Clark Schaefer Hackett.

For full audit information, please contact the Foundation office at 513-874-5450. The Community Foundation is pleased to work with our Investment Managers; First Financial Bank, Fifth Third Bank, Huntington Bank, Total Wealth Planning, and PNC Bank.

## Building a Legacy with Endowment and Planned Giving

Christine & Robert Humphreys were long-time West Chester residents and valued members of our community. After her husband's sudden passing in 2008 Christine established a Donor Advised Fund, the Robert & Christine Humphreys Family Fund, at the Community Foundation. The non-endowed fund allowed Christine to begin building a source of charitable funds that she could distribute over time to causes she and her husband cared about, while also providing immediate tax benefits. In 2016 Christine approached the Community Foundation about reviewing her fund and discussing the impact she wanted to make in the community. After reviewing her options Christine made the decision to endow her fund and allow it to grow, creating a self-sustaining source of charitable giving for years to come. She wanted her fund to support "parks, pets, and quality of life" in the community, and decided to ensure her legacy through a planned estate gift to her endowed fund at the Foundation, now called the Humphreys Family Fund. Unfortunately, Christine lost her battle with cancer early in 2017. We are honored to have been able to help Christine fulfill her charitable giving goals, and grateful to be able to carry out her legacy in support of the causes close to her heart.



# LEGACY

## Your Dream. Your Gift. Your Legacy.

The Community Foundation of West Chester/Liberty can help you build a legacy tailored to meet your charitable giving goals. We will work with you, or your financial or legal advisor, to plan for the future by defining your areas of philanthropic interests and charting a path that maximizes both the impact of your gift and the financial benefit to you and your family. You may choose to give to an existing fund or establish a new fund to support a nonprofit organization or cause close to your heart. Regardless of how you give, your planned gift to the Community Foundation will make an impact for generations to come.

Call us today to create your legacy. Contact Erin Clemons at 513.874.5450.

## Ways to Give

A **bequest** in your will is a simple way to leave a lasting legacy.

A **life insurance policy** can be changed to designate the Foundation as the owner and/or beneficiary of a policy.

**Retirement fund accounts** are often your largest asset. You can give all or part of these assets to the Foundation, both during your lifetime and/or at your death.

**Real estate** can be donated to the Foundation and deducted at full fair market value, up to 30 percent of your adjusted gross income. The Foundation sells the real estate and the net proceeds capitalize a new fund or are added to an existing fund. Similarly, tangible personal property can be donated to the Foundation, which is also then sold.

A **charitable remainder trust** allows you (or other named beneficiaries) to receive lifetime income. Upon your death, the remaining principal creates a fund at the Foundation. You receive an immediate charitable deduction for a portion of the gift and avoid capital gains tax.

A **charitable lead trust** creates income for the Foundation for a specified period, after which the remaining principal is distributed to named beneficiaries. Gift and estate taxes are reduced with this type of gift.

**Transfer of a private foundation** affords you many advantages, including lower overhead, staff to assist with your charitable goals, and a higher tax deduction for any future gift, to name only a few.

## 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."

## SPONSORS

**The Community Foundation would like to thank the following attorneys, estate planners, bankers, financial managers, accountants and businesses for their sponsorship of our 2015 Annual Report.**



### **Park National Bank**

Bill Schumacker  
Senior Vice President and  
Trust Officer  
Park National Bank  
513-718-6053  
[wschumacker@parknationalbank.com](mailto:wschumacker@parknationalbank.com)

*Bill Schumacker is Senior Vice President and Trust Officer for Park National Bank. Bill's knowledge and 36 years of banking experience make him a valuable advisor when investing for your retirement or planning your estate. Bill has a Bachelor's Degree in Business Administration & Finance from Butler University, and is a graduate of the American Banker's Association National Trust School and National Graduate Trust School. Bill gives back to the community through service on the Executive Board of the Community Foundation of West Chester/Liberty Township and as past Chair of the Administrative Board for St. Mark's Methodist Church in Fairfield, where he remains very involved. A past president of the West Chester Rotary Club, Bill was honored to receive the Paul Harris Fellow and Patty Daughtery Service Awards.*



### **First Financial Bank**

Barry Lampley  
Market President  
[barry.lampley@bankatfirst.com](mailto:barry.lampley@bankatfirst.com)  
[www.bankatfirst.com](http://www.bankatfirst.com)

*For over 150 years, First Financial Bank has successfully combined the expertise and services of a larger bank with the care and perspective of a neighborhood community bank. First Financial has grown from its roots in nearby Hamilton, Ohio to become the second largest bank holding company headquartered in Greater Cincinnati with assets of \$7 billion.*

*Although the bank continues to experience exciting growth, the mission of the bank remains the same. First Financial has and always will be a client-centered and relationship-focused bank that builds strong partnerships with its clients, local business and the community. First Financial proudly supports The Community Foundation to help improve the quality of life in the region.*



### **Total Wealth Planning**

Dave Wilder, Joel Musser,  
Rob Lemmons,  
Rob Siegmann and  
Jon Andre.  
513-984-6696  
[www.twpteam.com](http://www.twpteam.com)  
[info@twpteam.com](mailto:info@twpteam.com)

*Since 1989, Total Wealth Planning (formerly FMG) has provided objective guidance and solutions to clients helping them reach their lifetime goals. We utilize a comprehensive wealth planning approach tailored to multi-generational families, business owners and corporate executives. Many financial firms limit relationships to investment advice or commissioned product sales. However, our experienced team of professionals provides value with coordinated planning services such as: retirement and college plans, tax planning and projections, insurance analysis, and estate and philanthropic guidance. We serve client interests first and embrace the fiduciary standard. We're honored to be an approved charitable fund investment manager and serve the donors and the mission of the Community Foundation.*

## SPONSORS



**Millikin & Fitton Law Firm**  
513-863-6700  
[www.mfitton.com](http://www.mfitton.com)

*Pictured: Heather Sanderson Lewis, Catherine L. Evans, William C. Keck, John J. Reister, Jeffrey L. Rulon, Jon P. Whalen, Thomas A. Dierling, Steven A. Tooman, Paul G. Franke, Salvatore A. Gilene and Craig D. Havens. Not pictured: Samantha R. Wicktora*

*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 our clients.*



**Flynn & Company, Inc. –  
CPA's & Business  
Consultants**  
Richard T. Flynn, CPA  
*President/CEO*  
513-530-9200  
[rflynn@flynnco CPA.com](mailto:rflynn@flynnco CPA.com)

*Flynn & Company has been serving Greater Cincinnati's accounting and financial needs for over twenty two years. The firm specializes in providing professional services in the key business areas of accounting, audit, tax, and consulting to industry segments that include manufacturing, distribution, construction, privately owned businesses and non-profit organizations.*

*We are committed to helping our clients achieve financial success by providing innovative and practical solutions that are customized to meet their needs.*



**Cuni, Ferguson and LeVay,  
Co., LPA**  
Helen Fanz LeVay  
513-771-6768  
[HLeVay@cfl-law.com](mailto:HLeVay@cfl-law.com)

*Cuni, Ferguson and LeVay, Co., LPA is a boutique law firm conveniently located in Glendale / Woodlawn. The firm specializes in Corporate, Closely Held Corporations, Limited Liability Companies, and Partnerships; Real Estate; Community, Homeowner Association and Condominium Association Law; Planned Unit Development Law; Estate Planning; Probate and Ancillary Probate Administration; Probate Avoidance Planning; Family Wealth Preservation Planning; Gift Taxation Planning; Special Needs Trusts and Medicaid Planning; Estate and Trust Taxation; Fiduciary Law; Philanthropy; and, Charitable Giving. Partner, Helen Fanz LeVay, Esq., has nearly 30 years legal experience focusing on Estate Planning, Probate and Trust Administration, Estate and Trust taxation, Real Estate, Philanthropy and Charitable Giving.*



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*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.*

# MISSION / VISION / STAFF

## 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.

<b>Board of Directors</b>	<b>Staff</b>	<b>Grants Committee</b>	<b>Executive Committee</b>
<b>Ian Murray</b> <i>Chair</i>	<b>Erin Clemons</b> <i>President &amp; CEO</i>	<b>Tim Kelly</b> <i>Chair</i>	<b>Ian Murray</b> <i>Chair</i>
<b>Bill Schumacker</b> <i>Vice-Chair</i>	<b>Nancy Fister</b> <i>VP Finance</i>	<b>Chris Cartledge</b>	<b>Sandy Brueshaber</b>
<b>Tom Zenge</b> <i>Treasurer</i>	<b>Karen Gibbs</b> <i>Director of Programs &amp; Marketing</i>	<b>Erin Clemons</b>	<b>Erin Clemons</b>
<b>Chris-Xeil Lyons</b> <i>Secretary</i>	<b>Kate Feldmann</b> <i>Administrative Assistant</i>	<b>Marty Davis</b>	<b>Chris-Xeil Lyons</b>
<b>Sandy Brueshaber</b> <i>Governance</i>		<b>Mary Haglage</b>	<b>Bill Schumacker</b>
<b>Dan Benhase</b>		<b>Debbie Jones</b>	<b>Tom Zenge</b>
<b>Dave Bruno</b>	<b>Investment Committee</b>	<b>Pam Krieger</b>	<b>Audit Committee</b>
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<b>Tom Daskalakis</b>	<b>Dan Benhase</b>	<b>Shellie Leder</b>	<b>Kelly Brammel</b>
<b>Catherine Evans</b>	<b>Kelly Bramel</b>	<b>Chris-Xeil Lyons</b>	<b>Rick Flynn</b>
<b>Donna Leslie</b>	<b>Dave Bruno</b>	<b>Ray Murray</b>	<b>Brenda Frazier</b>
<b>Helen Fanz LeVay</b>	<b>Erin Clemons</b>	<b>Loren Schramm</b>	<b>Bill Schumacker</b>
<b>Bob Hutsenpiller</b>	<b>Vince Hall</b>	<b>Mike Zimmer</b>	<b>Karen Rolcik</b>
<b>Gail Jackson Miller</b>	<b>Ian Murray</b>	<b>Education Committee</b>	<b>Tim Sheeran</b>
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<b>Tim Sheeran</b>	<b>Greg Stamp</b>	<b>Katherine Maurer</b>	<b>Kim Satzger</b>
<b>Greg Stamp</b>		<b>Denise Renneker</b>	<b>Bill Schumacker</b>
<b>Dan Zieverink</b>		<b>Juli Smith</b>	



Excellence. Accountability. Impact.™

## National Standards Compliance Confirmation

In 2012, The Community Foundation of West Chester/Liberty compliance with the National Standards for U.S. Community Foundation was reconfirmed. This public symbol signifies that the Foundation is in compliance with the rigorous National Standards developed to U.S. community foundations. This designation is an indication of our integrity and demonstrated excellence. The Foundation first achieved this noteworthy achievement in 2007.



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