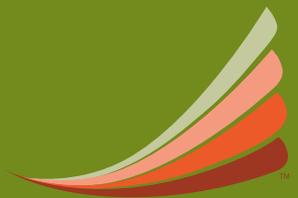


# Every Donation Tells a Story

2014  
Annual  
Report



Henry County  
Community Foundation

## Community Foundations Are Charitable Giving Experts

# What Is a Community Foundation?

A community foundation is a publicly supported organization created by and for local citizens to benefit their community. Community foundations pool gifts, both large and small, to meet local needs, build the community's capacity to help itself, and improve the quality of life for all the community's residents.

Because community foundations know and understand local needs, they are especially suited to educate and help people with their charitable contributions through personalized service and local expertise. Donors gain access to the community foundation's professional staff to learn about community needs and to identify innovative and effective community projects.

These characteristics make community foundations ideal for administering philanthropic funds. Donors can create funds now or in the future in their will through their estate planning.

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### COVER PHOTO:

Certified Therapy Dog, Lucky, listens as Dillon Smitherman reads and his brother Kody looks on. Rescued from abuse, see a full story on page 2 of how Lucky gives back to the community that saved his life.

The concept of a community foundation is as ingenious as it is simple – it is a means to build, over time, substantial endowment funds for a community through contributions large and small.

Dear friends...

## Every Donation Tells a Story



**S**tewardship is defined as the activity of protecting and being responsible for something. The Henry County Community Foundation fills a unique role in our community, where we are stewards of philanthropic donations, endowment funds and grant making.

While labor markets and economies fluctuate, program enrollments rise and plateau, and new legislative policy shapes infrastructure, the Foundation evolves to meet these constantly changing demands while supporting the success of community goals. That's why every donation tells a story of:

- **Recovery** ... see how rescued dog, Lucky, received help and is now serving others on page 2
- **Meeting Needs** ... see our grant recipients in action on page 3
- **Achievement** ... see what Erin Bundy did for her community on page 6
- **Overcoming Barriers** ... see how scholarships affected student success on page 7
- **The Road Traveled** ... see why Dick & Carolyn Riley are giving back on pages 8 & 9
- **Things to Come** ... see why Todd Thalls joined the Legacy Society on page 12

In 2014 with your help, the Foundation continued its role in stewardship by investing and growing the assets while promoting the health of the community with nearly \$1 million awarded in grants.

We are partners with social services, art and culture, education, economic development, downtown revitalization, and the development and preservation of healthy people and places.

The Foundation continues to develop funding sources and is advancing delivery of donor support and outreach opportunities. The permanent endowment of donors establishes funds that pay out a percentage of earnings every year, *forever*.

Thank you for sharing your generosity and trust in our stewardship. Most importantly, thank you for letting us be your partner in philanthropy.



Susan Falck-Neal, 2014 Chair



Beverly Matthews, President

# The Ripple Effect

By Jennifer Fox

In 2006, the family and friends of Curtis Marcum could not foresee the lives that would be changed by their generosity in establishing the Curtis Marcum Memorial Endowment Fund. Curtis is remembered for his love of reading and animals, and the fund created in his memory continues to benefit the New Castle-Henry County Public Library (NCHCPL) and the Henry County Humane Society.

With help from Curtis' fund, both of these organizations have come together to form something extraordinary, creating a ripple effect.

Lucky the dog is truly a lucky dog. Rescued by the Henry County Humane Society from a life of neglect and abuse, Lucky found himself in the home of New Castle Police Captain Brad Flynn and wife, Aimee Flynn, a third grade teacher at Westwood Elementary. Bringing him back to health opened the doors for him to touch the lives of many.

While exercising Lucky around Baker Park, the Flynns noticed Lucky's keen interest in the participants of the local Special Olympic team. After walking him over to visit with the

***"...if it weren't for the Humane Society and organizations like Special Olympics, Miracle League and the library, he would not be able to bring happiness to so many people."***

***- Brad & Aimee Flynn***



*Lucky the dog was able to showcase his talents after he was adopted by Brad and Aimee Flynn from the Henry County Humane Society/New Castle Animal Shelter. Prior to his stay at the shelter, Lucky was rescued from a life of abuse. After the Flynns discovered Lucky had a keen interest in children, he became a licensed therapy dog and listens to children read at the library and is an active partner with participants of the local Miracle League team.*

and donations, dogs such as Lucky are given second chances at life through the Humane Society,

and the library can provide important literacy programs for our citizens starting from birth through adulthood.

players, their families and the volunteers, they realized his potential. Lucky became a licensed therapy dog in July 2014. Since then he visits athletes who are physically and cognitively challenged at Miracle League practices and participates in the New Castle-Henry County Public Library children's reading program.

"Library staff are very appreciative of the funds we receive from the Henry County Community Foundation," says NCHCPL Director, Winnie Logan. "One of our biggest yearly programs is Summer Reading. Although it is for all ages, we know how important it is to keep kids reading and engaged with learning throughout the summer to help with their progress in the coming school year. Foundation funds allow us to expand the program offerings that we are able to provide for the community to make our Summer Reading program one of the best attended programs offered at the library."

"Lucky thinks the world revolves around him and he lives on the attention of people," Brad says, as he pauses walking while Lucky greets some people passing by. "He loves people and if it weren't for the Humane Society and organizations like Special Olympics, Miracle League and the library, he would not be able to bring happiness to so many people."

Lucky is an example to the power of funds like the Curtis Marcum Memorial Endowment Fund. With an accumulation of fund payouts

Working together to preserve a memory, rescue dogs, and help children, multiplies the lives touched by generosity.

# Community Grants

## Unrestricted Grant Financials

Spring Grant Cycle . . .	\$	83,548
Fall Grant Cycle . . . . .		93,253
Pro-Active Grants . . . . .		12,653
Santa Grants . . . . .		3,000

---

Total . . . . . \$ 192,454

Grant requests received: \$502,713

## Pledges Fulfilled

Ivy Tech		
2nd of 5th pledge . . . . .	\$	35,000
YMCA		
4th of 5th pledge . . . . .		50,000
TASC – Youth Grants Committee . . . . .		16,000
Lilly Scholar Finalists . . . . .		6,000

---

Total . . . . . \$ 107,000

Grants are awarded in the spring and fall, and workshops are announced prior to each deadline in order for applicants to receive assistance in completing the formal application process. Copies of the grant guidelines and application forms may be obtained from the Foundation office or from the website.

### GRANTS COMMITTEE

Debi Ware, Chair; Dr. Richard Armstrong, Danny Bowman, Bill Bergmann, Mike Burch, Marsha Conway, Susan Denison, Marsha Gratner, Scott Lightfoot, David McCord, Lisa Pfenninger, Juanita Sheward, Todd Thalls, Penny York

## 2014 Grant Awards

### ORGANIZATION

### PROJECT

Art Association of Henry County . . . . .	Window Repairs & Vault/Storage for Art Collection
Baker Park Pickleball . . . . .	Pickleball Courts
Creative Arts Summer Troupe . . . . .	Keyboard
Charles A. Beard Schools . . . . .	Playground Equipment
CRADLES Child Care . . . . .	Equipment/Scholarships
Danielson Learning Center Higher Education . . . . .	Marketing
Developmental Services, Inc. . . . .	Health and Wellness Program
Family Services and Prevention Programs . . . . .	Books for Babies
Friends of Sunset Park . . . . .	Restroom Renovation
Harvest Christian Camp . . . . .	Camp Sponsorship
Henry County CASA/HC Sheriff's Department . . . . .	Sexual Assault / Juvenile Abuse Center
Henry County Historical Society & Museum . . . . .	Artifact Conservation, Preservation and Environment Control
Healthy Communities of Henry County . . . . .	Wilbur Wright Trail Phase II
Henry County Memorial Park . . . . .	Shelter House Lighting and Repairs
Hillcroft Support Services to Disabled . . . . .	Automatic Door Opener
Hoosier Gym Community Center . . . . .	Marketing
ICAP . . . . .	Women's Clinic and Covering Kids & Families/Affordable Care
Kennard Elementary Science Education . . . . .	Spaceport Lab
Knights of Pythias, Crescens Lodge No. 33 . . . . .	Historic Building Restoration
Knightstown Public Library . . . . .	Historic Building Upgrade
Middletown/Fall Creek Historical Society . . . . .	War Memorial
New Castle Breakfast Optimist . . . . .	Mini Marathon/Triathlon
New Castle Girls Youth Softball League . . . . .	Dugout Replacement
New Castle-Henry County Emergency Response Team . . . . .	Flashbang Pole and Helmets
New Castle-Henry County Public Library . . . . .	History Comes Alive
New Lisbon Volunteer Fire Department . . . . .	Snow Plow for Fire Truck
Second Harvest Food Bank . . . . .	Tailgate Program
Shirley Historical Society . . . . .	Returning Railroad Caboose
Spiceland Preservation & Tourism Society . . . . .	Hoover Hall Historic Building Restoration
Spiceland Public Library . . . . .	Technology Upgrade
Town of Sulphur Springs . . . . .	Historic Building Restoration
Victory Lane Camp . . . . .	Matching Family Sponsorship
Young Life . . . . .	Young Life Start Up "Re-ignite"

A Story of Meeting Needs

# TASC Teens About Serving the County

The TASC (Teens About Serving the County) Youth Grants Committee meets four times each school year. The TASC Committee includes one 8th grader, one freshman, one sophomore, one junior, and one senior from each of the five school districts in Henry County.

The TASC Committee assignment is to evaluate grant submissions relating to youth and educational programs. The Henry County Community Foundation, Inc. provides the TASC Committee with a budget from the Unrestricted Funds for Community Grants. Youth Grants Chairman, Bill Bergmann, as well as three Foundation board representatives, oversee the process and ensure basic parliamentary procedure is followed.

Along with the privilege of serving on the TASC Committee, these students accept the responsibility of critically evaluating each grant submission for purpose, scope, need, and viability. They then determine whether each grant will be accepted as is, partially funded, denied, or accepted with conditions. The TASC Committee grant recommendations are then taken to the Henry County Community Foundation Board of Directors for final approval.

## TASC Grants

ORGANIZATION	PROJECT
Big Brothers Big Sisters .....	Marketing
Blue River Valley BPA.....	Hats Off Program
Blue River Valley High School .....	Forever Friends
Boy Scout Troop 450 .....	Exercise Park
Christian Love Center, AAHC, & Hope Initiative.....	Back to School Festival
Girl Scout Troop #30612.....	Bottle Cap Benches
Henry County Pregnancy Care Center .....	Formula
HOSA (Health Occupation Students of America) .....	National Conference
Knightstown Intermediate School .....	VEX Robotics
Little Blessings.....	Backpack Program
New Castle Career Center.....	Studio Expansion
New Castle High School PEER Class .....	PEER Field Trip
New Castle Pediatrics.....	Reach Out and Read
Shenandoah NHS/FFA.....	Operation Christmas/Snug Prom
Spiceland Township Public Library.....	Children's Summer Reading Program
Tri Jr./Sr. High School .....	Reading Technology
Tri Elementary .....	Family Involvement Night
Grants awarded    \$16,000	



Teens About Serving the County (T.A.S.C.) Grantmaking Committee

*Row 1: Molly West, Audrey Felix, Rachel Weiland, Katie Pfaff, Lauren Congdon, Brooklynn Byrer, Jessica Butler  
Row 2: Carly Allen, William Burgess, Brenna Koontz, Andrew Whiting, Bobby Pierce, JJ Myers, Joffrey Niessen, Gwen Mathis, Katelyn Goodpaster  
Row 3: Deven Jones, Noah Brown, Pete Wissel, Sam Thompson, Thomas Witham, Michael Weiland, Jon Lukens, Hayden Hutson  
Not Pictured: Brandon Barnes*

# Lilly Endowment Community Scholarship

Since 1998, Lilly Endowment has awarded scholarships to Henry County resident students to cover the cost of tuition to any Indiana college or university and \$900 each year for books.

In 2014, one more student was added to the thirty-two (32) who have previously been honored with the scholarships. Of the seven nominees only one was selected to be the Lilly scholar, with the remaining six receiving \$1,000 scholarships from the Henry County Community Foundation. All nominees are chosen by their respective high schools to be eligible for the scholarship. The final process is a forty-five minute interview with three judges from outside the county. Each

student is judged based on their academics, extracurricular activities and accomplishments, community involvement, and interview skills. The top choice and two alternates are submitted to Independent Colleges of Indiana, Inc. (ICI) for the final approval of the selection.

ICI is a nonprofit corporation that represents 31 regionally accredited degree granting, nonprofit, private colleges and universities in the state. The scholarships are the result of a state-wide Lilly Endowment Initiative to help Hoosier students reach high levels of education with the hopes they will stay in Indiana and even return to their hometowns to work and to live. There are over 200 scholarships awarded statewide annually.



## Finalists for 2014

*Front Row:* Lisa Rodriguez, Adrienne Trennepohl

*Back Row:* Eric Richardson, Dakota Coates, Garrett Wilson, Molly McCord, Kaitlin Frost



2014  
Lilly  
Scholar

Eric  
Richardson

Eric Richardson is a graduate of Tri High School class of 2014. The son of Joyce Richardson, Eric is currently attending Rose-Hulman Institute of Technology and studying mechanical engineering with a concentration in aeronautical. While a student at South Henry Schools, Richardson was a member of the Cross Country, Track, and Business Professionals of America Teams, as well as being a class officer.

Richardson has also spent time volunteering with the Hoosier Gym, Cheer Guild, and his local baseball park. He was honored as an Outstanding Student in U.S. history and pre-engineering, along with earning 5th place in the Shell eco-marathon national competition through his pre-engineering class at the New Castle Career Center.

Upon receiving the Lilly Endowment Scholarship, Richardson said, "I would like to thank my family and the staff at Tri High who are, in part, the reason I am the student I am today."



# Erin Bundy Pays it Forward to Knightstown

By Jennifer Fox

Philanthropy comes in all sizes as Bill Gates donates billions and a neighbor donates \$10. Philanthropists are made up of all ages. Warren Buffett is 84 years old and Erin Bundy is 20 years old, but each individual has one thing in common. They are both impacting their communities and the world.

Henry County's Lilly Scholar in 2013, Erin Bundy, is looking to transform the area of Knightstown through collective giving. Upon receiving word she was selected as the recipient of the Gold M Award, she was given the opportunity to direct \$5,000 to a charity of her choice. After careful consideration, Ms. Bundy elected to establish the "Knightstown Pay It Forward Community Fund" at the Henry County Community Foundation.

"I chose the focus of Knightstown because this community has helped shape me into the person that I am today and I wanted to 'pay it

*Erin Bundy, on right, is assisted by Baylie Hochstedler at the Annual Knightstown Cheer Guild Food Drive. Volunteering is a consistent part of Bundy's desire to make a difference.*



forward.' I want to give back to the community and help make our town a better place in any way that I can," said Bundy.

Bundy is no stranger to community service. During her high school career, she was a regular volunteer with the Cheer Guild, local blood drives and she also organized a visit with Santa for children to raise money for charity. Her concern for the world around her was also evident when she created Step Forward for Haiti to provide shoes to those affected by the 2010 earthquake.

"A fund at the Foundation provides a permanent charitable resource that grows and provides much-needed funding to local nonprofit organizations. When you give to the endowment, you're helping to meet the needs of our community today, and for years to come," said Beverly Matthews, Henry County Community Foundation president.

Bundy created the Field of Interest Fund which allows flexibility to meet the changing needs in the Knightstown community. "My vision for this fund is to be something that will be beneficial in a multitude of ways for a variety of groups and people so that it can help the entire community," explained Bundy. Grants will be given to non-profit organizations providing charitable services to the area of Knightstown and will be chosen by a



*Erin Bundy is awarded \$10,000 from the M Foundation during a Mets game in 2014. \$5,000 was given to Bundy as a scholarship and the remaining \$5,000 was directed by Bundy to the HCCF to establish the Knightstown Pay It Forward Community Fund to benefit the community in which she was raised.*

local committee chosen by the Henry County Community Foundation.

Bundy is now calling upon her fellow citizens to pitch in and grow the endowment to provide more resources, "I think it is really important and hope that people will be involved with this fund because it is truly there to support everyone in the community. The more people are involved, the more people the fund will be able to reach...which will make it more beneficial overall."

Those interested in supporting the "Knightstown Pay It Forward Community Fund" can make a donation online at [www.henrycountycf.org](http://www.henrycountycf.org) or mail donations to the Henry County Community Foundation, PO Box 6006, New Castle, IN 47362. Donations are tax-exempt.

"I hope as the fund gains more momentum, people will 'pay it forward' and donate back into the fund so that it becomes a great resource for the community," expressed Bundy. "Everyone can make a difference, no matter the size of their income."

# Scholarships Provide Success for Local Student

By Beverly Matthews

A former participant in the local Big Brothers Big Sisters program, Trevor Williamson, was inducted into Kappa Beta Delta International Business Honor Society in 2014. With the moral support of his Big Brother, Dan Yeager, during his youth, and scholarships from the Henry County Community Foundation, Williamson graduated in May with his second associates degree from Ivy Tech Community College.

Williamson was recognized at the annual Scholarship Benefactor Reception hosted by the Ivy Tech Foundation in Muncie on April 16, 2014. Speaking to the group of patrons, Ivy Tech administrators and other students, Williamson said, "This would not have been possible without the help of scholarships. As the son of a hard working single parent, four-year colleges were all but out of bounds for me when I graduated high school. But I wanted a degree in the field that I loved - computers. It was then that I spoke with my high school computer teacher and he recommended Ivy Tech."

"Even though Ivy Tech had a significantly smaller tuition than other colleges it still wasn't affordable to me, so I sought out scholarships from the Henry County Community Foundation and Ivy Tech, and was able to start my college career," he added.

According to the Henry County Community Foundation, Williamson received assistance from the Opportunities Unlimited Scholarship, Ray Family Scholarship and Ray Pavy Spirit Scholarship.



"We are very proud of Trevor's accomplishments," said Beverly Matthews, president of the Henry County Community Foundation. "Donors who establish scholarships and those who contributed to these scholarships are seeing their intentions of helping local students succeed in life being fulfilled."

After completing degrees in digital information security and information technology, Williamson began pursuing a bachelor's degree in computer information technology at Ball State University in the fall.

"This would not have been possible without the good Lord above, my mother and grandmother, and the Henry County Community Foundation scholarships I received. The people who donate to the scholarships are wonderful and have given students like me the chance to change our lives. I personally say thank you," Williamson told the audience.

*Left to right: Dr. Rob Jeffs, director of the Ivy Tech Henry County Campus; Trevor Williamson, local Ivy Tech student and scholarship recipient; and Beverly Matthews, president of the Henry County Community Foundation, who attended the annual Scholarship Benefactor Reception, hosted by the Ivy Tech Foundation in 2014. Trevor was recognized for his achievements made possible by scholarships provided through the Community Foundation.*

***"Donors who establish scholarships and those who contributed to these scholarships are seeing their intentions of helping local students succeed in life being fulfilled."***

A Story of Overcoming Barriers

# All Roads Lead “Home” for the Rileys

They stay connected to the place they love through the Foundation

By Beverly Matthews

“We chose to be part of the Henry County Community Foundation because we can never forget New Castle. Some people say you can never go home again but the truth is, we can always go home again,” said Dick Riley, retired insurance executive and 1960 New Castle High School graduate.

Dick and his wife, Carolyn, a 1961 New Castle High School graduate and former med-tech, can't forget their hometown and want to see it prosper. That's why they continue to support the community they love through the Henry County Community Foundation.

The Rileys have lived in many different places in the country throughout their careers and now reside in South Carolina, but they continue to come back to New Castle and support education and community improvement endeavors. They have been benefactors to the IU East Danielson Learning Center, New Castle Class of 1960 Scholarship, Henry County YMCA, Ivy Tech – Henry County Campus and most recently to the Unrestricted Fund for Community Grants.

“We know that when we give through the Foundation that money is going to multiply and it's going to continually be used for purposes we've designated and just like everyone else who gives to the Foundation, the whole thing is about keeping the community a good place to live and work and go to school,” explained Carolyn.

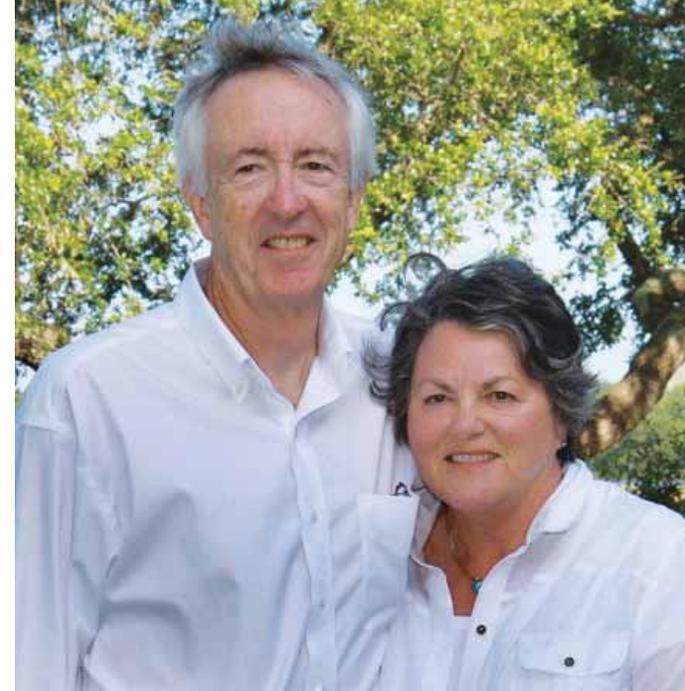
### Formative Years Led to Success

Growing up in a “golden time” for New Castle during their formative years in the

1950s – the community has influenced Dick and Carolyn their entire lives. “I thought the class of 1960 was the best class you could imagine,” said Dick. We had a really good feeling about ourselves and a huge amount of class spirit. That's the reason I stay in touch with as many classmates as I can and Libby Edwards keeps us connected. Bill Baker was my best friend for many years and Ray Pavy is one of the greatest people I know. Another reason I come back is because Danny Danielson has become my friend and I've known him for about 12 years now and I wish I would have known him my whole life,” he added. Those relationships help Dick and Carolyn stay connected and even ended up with Dick becoming a board member on the IU East Danielson Learning Center Advisory Committee.

The Rileys haven't lived in New Castle since they were 18 years old but they still consider themselves “Hoosiers.” They believe their upbringing helped them in their lives and want to share their success with the community. Visits remain steady because Carolyn's family still lives in the community.

The Rileys discovered the best way to invest in their hometown community was through the strength of the Foundation – who has given away over \$17M in grants back to the community since 1985. In response to a Lilly Endowment Inc. match opportunity to grow assets in the Foundation's Unrestricted Fund for Community Grants, the Rileys wanted to help build the fund they believe can help the community most. (continued)



Dick & Carolyn Riley continue to support the community they can't forget.

**“We chose to be part of the Henry County Community Foundation because we can never forget New Castle. Some people say you can never go home again but the truth is, we can always go home again.”**

**- Dick & Carolyn Riley**



Dick Riley  
Class of 1960



Carolyn Haynes Riley  
Class of 1961



*The Rileys wanted to invest in their hometown community and help students achieve higher education opportunities that are more available and affordable.*

### All Roads... (continued)

Dick and Carolyn are real advocates for New Castle and want good things for their hometown. They're happy that Boar's Head Meats has chosen the community to build a new plant and they follow the growth of businesses. "We hope New Castle continues to build a great commercial environment. The town is a beautiful location, right in the middle of the state with the highway (70) right there."

There are a lot of people invested in and pulling for the Henry County Community. For Dick and Carolyn Riley, they are excited to be part of a place that helped them form a wonderful life and friendships that last a lifetime.

#### WHO

Richard and Carolyn (Haynes) Riley, New Castle High School Graduates, 1960 & 1961

#### WHAT

Support their hometown through the Henry County Community Foundation

#### WHEN

Currently support the community in education and community improvement initiatives

#### WHERE

They reside in South Carolina but frequent visits and friendships help them stay connected

#### HOW

The Rileys contributed to the Unrestricted Fund for Community Grants through their IRA and also support the New Castle Class of 1960 Scholarship and local education initiatives

#### WHY

Because of great experiences in their formative years and they want the community to prosper

*Dick and Carolyn have supported education initiatives in Henry County, including Dick's service on the IU East Danielson Learning Center board of directors.*

## New Castle Class of 1960 Alumni Scholarship



The New Castle Class of 1960 Alumni Scholarship was established in 2003 by classmates Dick Riley, Elizabeth White Edwards, Glen Abrams and Nancy Foster Hannon. Many classmates have become a part of this scholarship initiative that helps students graduating from their alma mater, NCHS.

With their 55 year class reunion coming up in October 2015, the class is initiating a campaign to increase the amount of their scholarship.

"The cost of college has risen out of sight and we just want to help students get their degree without bankrupting their parents. We had a wonderful education at New Castle High School and want to make sure that students have the opportunities we had in 1960," said Dick Riley.

If you would like to contribute to the New Castle Class of 1960 Alumni Scholarship, you can send donations to the Henry County Community Foundation (with "Class of 1960" in the memo line) to PO Box 6006, New Castle, IN 47362 or donate online at [www.henrycountycf.org](http://www.henrycountycf.org).

For more information, contact the Foundation at 765-529-2235.



## 2014 Judy Melton Award Recipient Morris Edwards

By Kevin Green

New Castle native Morris Edwards was honored by the Henry County Community Foundation (HCCF) during the 2014 Annual Meeting when HCCF president, Beverly Matthews, announced him as the Judy Melton Award recipient.

"I am so grateful to have had the opportunity to serve and help raise the money needed to do good works in Henry County and hope to continue to do so," Edwards said, adding that he is pleased with the work of the Foundation and that he is proud to have done his part.

Edwards helped establish the local community foundation and was one of the original members of its board of directors. He also is a former president of the HCCF Board.

His family owned Edwards Jewelry Store in downtown New Castle for many years, and his uncle, John Morris, was a longtime local judge. Matthews said he not only helped get the Foundation up and running but has also been an integral part of its growth and success over the years.

Judy Melton was a past president and board member of the HCCF. Matthews described her as a "tireless volunteer" who used her skills as an English teacher to produce the formal communications published by the Foundation. She also wrote many successful grants.

Melton was involved with the Foundation from 1993 to 2005 and died in 2009. A memorial plaque with her engraved likeness in the Foundation office is a reminder that commitment and hard work have paved the way for the organization's success. The award named in



her honor recognizes others who go above and beyond expectations.

Matthews explained that the HCCF board of directors annually selects an individual who exemplifies Melton's qualities. The recipient's name is engraved on Melton's plaque.

"This year's winner has never stopped promoting the Foundation, continues reaching out to donors, maintains relations with long-time supporters and has a long history of family business and service in New Castle," she said.

"He has been committed to the Foundation since its formation, serving as board president and continuing to serve as a vital committee member. He remains dedicated to building assets to improve life in Henry County. Because he still asks for others to contribute and many times offers to match donations, the Foundation receives the gifts from his influence and we

***"I am so grateful to have had the opportunity to serve and help raise the money needed to do good works in Henry County and hope to continue to do so."***

***- Morris Edwards***

should all be inspired by his example," Matthews said in introducing him. "This person exemplifies how one life can make the biggest difference and change the course for good in our community."

*Edited and reprinted with permission from The Courier Times*



*Surrounded by other founding members, Morris Edwards has been a consistent supporter and advocate of the Foundation since the age of 29.*

***Shown above, in 1993 (left to right, front): Rex Slick, Doug Reeves, Morris Edwards, Herb Bunch, and Judy Melton. Back row: Dick Myers, Patty Danielson***

# Health and recreation

are important parts of a vibrant community and the Henry County Community Foundation is proud to support initiatives to improve human health and the quality of life in Henry County.



## Pickleball

Pickleball is a fun paddle sport for all ages and all athletic abilities. It has simple rules, is easy to learn and play and provides a healthy activity for everyone. The Henry County pickleball courts located in Baker Park have been phenomenally successful after their installation made possible in part by a grant from the Henry County Community Foundation Unrestricted Fund for Community Grants.



## ICAP Women's Health Clinic



*Nancy Lewis, Director of Health Services*

Screening tests can find diseases early, when they are easier to treat. A grant to the ICAP Women's Health Clinic helps to provide assistance to uninsured clients in a wide range of services including mammograms, pap smears, blood pressure checks as well as assistance in signing up for health insurance coverage.



*Heather Turner, Nurse Practitioner*

## Create a Legacy Today for Tomorrow

By Beverly Matthews

It is a special person who provides for the future of his or her community. Todd Thalls, a 1977 New Castle graduate, returned to the community he loved after getting a degree from Taylor University. He joined the family business, Thalls Insurance—that later merged with Ameriana Insurance—where he is leading the company today.

Being dedicated to service in the community, Thalls serves on the Grants Committee of the Henry County Community Foundation (HCCF), where he saw firsthand “...how fantastic unrestricted grants are in reaching and helping all facets of the community.” In addition, he is an active board member and volunteer with other charitable and civic organizations and sees the importance of these groups in supporting the community he cares about.

“I love the idea of a permanent endowment and how it’s going to help the community now and in the future,” said Thalls. That’s why when he was making out his will that he decided to leave a portion to the Henry County Community Foundation

to continue the good work he does today.

“Because of what the community has meant to our family and opportunities the Foundation has provided, I wanted to secure a gift to commit for the future. I highly recommend including the Foundation in your will,” he stated. “It’s a simple process and the Foundation will even provide the bequest language that can be included.”

According to Beverly Matthews, President of HCCF, “The Legacy Society is being created for caring individuals who have made formal plans in their will or estate plan to benefit the community through a gift to the Foundation. A simple declaration of your intent is all that is required. No confidential details need be disclosed. Donors may also choose to make their gift anonymously, without public recognition.

### What is a Permanent Endowment?

An endowment is a permanent fund and allows the donor to support their charitable interests in perpetuity. The initial gift is invested and a portion of the gift is available each year to be distributed to their charities of choice, while the rest remains invested. Over time, the donation grows and the grants to charity will far exceed the amount of the donor’s original gift.

Our commitment to you is that we’ll be here, honoring your intentions, forever, and we’ll make it easy for you to fulfill your unique charitable goals. Call us with any questions at 765-529-2235 or visit our website at [www.henrycountycf.org](http://www.henrycountycf.org).



*Todd Thalls is creating a legacy by including a gift in his estate plan to the Henry County Community Foundation. As a dedicated volunteer, he wants to make sure that causes he cares about will continue to be supported.*

Now, through the Legacy Society, such thoughtful and generous commitments can be recognized appropriately and be given the chance to inspire others.

We invite you to become a member of the Legacy Society – like Todd Thalls – among the Foundation’s family of donors whose legacy will enrich our community today, tomorrow and forever.

***“I love the idea of a permanent endowment and how it’s going to help the community now and in the future.”***

***- Todd Thalls***

## Becoming A Legacy Society Member

**T**he Legacy Society is a group of dedicated individuals who recognize the value of the Henry County Community Foundation and want to support our mission to enhance the quality of life in Henry County.

Members of the Legacy Society recognize the importance of making a future gift through the Foundation, and with their leadership they encourage others to do so as well. Their planning today will benefit our community for generations to come.

### How Do I Become a Member?

You are already eligible for membership in the Legacy Society if you have made arrangements in your will or through another planned giving vehicle for a gift to the Foundation. Deferred gifts may take the form of bequests, charitable remainder trusts, life insurance, or other types of charitable planned gifts.

We will be happy to work with you and your advisor to tailor a planned gift that best meets your personal situation. Such gifts may be unrestricted in use, support a particular area of interest (such as senior issues, health or the arts), be added to your donor advised fund, or designated in another way you specify.

## Introducing Our Planned Giving Website

**O**ur planned giving website includes valuable personal, financial and estate planning resources. We are here to assist you in creating a plan that is right for you and your family.

Our planned giving website will always contain timely material for you to read. Discover your favorite column and visit week after week.

*Weekly updated articles include:*

- **Personal Wills Planner**
- **The Latest Financial News**
- **Tips for Savvy Living**
- **Reports from Washington**
- **Stories of Giving**

Sign up for our FREE weekly e-newsletter and the articles will arrive in your inbox. What could be more convenient? Come visit our planned giving website today! Go to [www.henrycountycf.org](http://www.henrycountycf.org) and click on Planned Giving under the Donor Services tab.

## Making a Difference

**T**he Henry County Community Foundation is in a unique position to make a tremendous difference in our community. But, we couldn't do this without the generosity and vision of you, our donors. We are here to honor your intentions and support the causes you care most about.

When you establish your unique fund at the Henry County Community Foundation you're given the opportunity to lay out your charitable goals and begin making an impact immediately. Or, you can establish a "future" fund today that will impact your community forever with a gift from your estate.

Naming the Henry County Community Foundation in your will is one of the easiest ways to make an important difference in Henry County. It's as simple as adding this statement to your will.

*I give and bequeath \_\_\_\_\_ [describe gift] to  
The Henry County Community Foundation of New Castle,  
Indiana, to be held as a component fund known as the  
"\_\_\_\_\_ Fund." This fund was separately  
created for the charitable purposes agreed to by me  
and The Henry County Community Foundation.*

For more information, please contact the Henry County Community Foundation at 765-529-2235 or [info@henrycountycf.org](mailto:info@henrycountycf.org). Sign up for our Gift Legacy E-Newsletter for up-to-date, helpful information on topics that impact your quality of life, your finances and your legacy at [www.henrycountycf.org](http://www.henrycountycf.org).

# Charities Receive Boost at Women's Gala

By Donna Cronk

Dozens of Henry County women flexed their collective philanthropic muscle during the 2014 Women's Circle of Friends Gala, an outreach of the Henry County Community Foundation. Each woman donated at least \$50 for the opportunity to listen and vote as representatives from three local non-profits told about their organizations. The \$5,027 collected was pooled to benefit the charity receiving the most votes. The women awarded The Guest House, a New Castle men's shelter at 1407 Walnut St., with the check.

Two runners-up each took home \$225. They were Healthy Communities of Henry County and Friends of Sunset Park of Knightstown. Beverly also presented \$670 from the Women's Circle Endowment Fund to the Interlocal Community Action Program for the Women and Child Clinic.

Moments after accepting the night's largest monetary award, Jeff Morton, board chair of the men's shelter, said winning was fantastic. "I just never knew there was such a great need in the county (for a men's shelter). We're just very grateful."

It's a need that Morton learned to appreciate. Morton explained that some of the men who stay there literally have no other place to go. Some have been released from prison and have been known to sleep on the ground behind a local church. The Guest House goals for the men include a four-point plan: *1. Provide emergency food and shelter for homeless men. 2. Teach them life skills in a healthy, safe environment. 3. Offer the life-saving, life-changing message of Jesus Christ. 4. Help them find jobs.*

He says of the men currently at the shelter, almost all are working. Transportation is provided along with training and education. A long-term goal is to find them permanent housing.

There is no government or other funding other than donations from area churches and people with the same passion as those who volunteer for The Guest House. The Women's Circle of Friends monetary award will go toward operational expenses. Encouraged by the event was Joyce Miller of New Castle. "I just think if you can get a group of women motivated to improve a situation, they'll get it done." She said New Castle is her hometown. "I still believe in it," she added, saying that there are a lot of not-for-profits at work.

*Edited & reprinted with permission from The Courier Times*



**The Women's Circle of Friends** is made up of women who are interested in supporting Henry County by contributing to a local charity together as a unit to increase their impact. All ladies are invited to donate \$50 for the betterment of our community and who will join us on September 15, 2015 for our Grantmaking Gala, held at the Art Center in New Castle.

Since it began in 2013, the group has awarded \$11,355 to local not-for-profit organizations. To join us on September 15, 2015, please send your donation of \$50 or more to the Henry County Community Foundation.

As a Community Foundation,  
the Henry County Community Foundation  
addresses the broad needs in Henry County  
which include, but are not limited to,  
the following five categories:

## Health & Medical

to include the support of hospitals, rehabilitation centers, not-for-profit health and medical related programs including safety and wellness and recreational programs;

## Social Services

to include the support of human service organizations, programs for children and youth, and services to the aged;

## Education

to include support for programs in preschool, elementary, secondary, and post-secondary education, scholarships, and special education programs;

## Cultural Affairs

to include the support of programs and facilities which are designed to establish a diversified county cultural program that offers widespread opportunities for participation and appreciation; and

## Civic Affairs

to include the support of programs and facilities related to criminal justice, community development, employment, citizens' involvement, leadership training, and other community activities.

## Unrestricted Endowment Fund for Community Grants

*This year, the Henry County Community Foundation made grants totaling \$299,954 from its Unrestricted Fund for Community Grants to support a range of needs in the community. The flexibility allowed by the Unrestricted Fund enables the Foundation to respond to unexpected opportunities, creative proposals and unforeseen emergencies in Henry County. Funds supporting the Unrestricted Fund for Community Grants include:*

Catherine J. Adams  
**Ameriana Insurance Agency, Inc.**  
Dr. Richard & Sally Armstrong  
**Sheriff Butch & Rebecca Baker Family Fund**  
Alan & Jacki Beatty Fund  
Albert & Jean Becker  
Dale & Joan Biddinger Memorial Fund  
W. C. Bond Trust  
Scott & Doris Bouslog Family Fund  
Dr. Lynn & Cassandra Bowers Family  
Marilyn Bowman Fund  
Lewis & Alma Brennenan Memorial Fund  
**Herb & Judy Bunch Family Fund**  
**Herb Bunch Honorarium Fund**  
**Harry A. Burke, Sr. Family Fund**  
Delinda J. Caldwell – in memory of James William Caldwell  
**Loretta Carlton Memorial Fund**  
Earl, Sr. & June Cassady & Sons Don, Earl & Dr. Tim Cassady Fund  
Cinergy Foundation, Inc.  
Cleveland Family Fund  
Clifford Joe & Violet Crane Fund  
**Glen & Roberta Cunningham Honorarium Fund**  
**Harold & Lillian Dailey Memorial Fund**  
**Danny Danielson Honorarium Fund**  
Donald C. & Patricia Peterson Danielson  
**Patricia Peterson Danielson Honorarium Fund**  
Nate & Allie Dann Family Fund  
Peter & Pamela DePrez  
Dr. David & Lydia Dickey

Dr. Cloyd & Mary Lou Dye  
Cathy Edwards  
Elizabeth A. Edwards, Mari Anna Johnson & Niccole de Campos  
**H. Ray & Susan Morris Edwards**  
Morris & Shirley Edwards  
Eichhorn Family Memorial Fund  
Phil Estelle Memorial Fund  
**Frost Framing**  
**Galyen Family Fund**  
Ruth M. Garner  
The GEO Group  
David F. & Betty O'Neal Giboney Fund  
**Glen Oaks Health Campus**  
**Ward & Dora Hale Memorial Fund**  
**Dennis & Cathy Hamilton**  
**Hamm Family Fund – Duke & Cathy**  
Hamm, Thomas Hamm  
**Aliene Harding – in memory of A. O. & Lilly Harding**  
**Charlene Harvey – in memory of Ralph Harvey**  
**Robert C. & Barbara M. Haugh – in memory of Forest H. & Ruby N. Meek**  
**Mary Phyllis Hayes – in memory of Clarence & Edna Burgess Scott**  
**Henrico, Inc. – Bennett House**  
**Henry County Community Foundation**  
**Board of Directors**  
**Jean Bond Hough Trust**  
**Robert S. Hunter, Jr. & Eleanor Hunter**  
Memorial Fund  
Dr. George Iterman Trust  
Clarence Jackson Trust  
**Robert H. Jones Honorarium Fund**  
**Margaret Hair Lane & Martin Sims Lane**  
Memorial Fund  
Lewis & Marjorie Larrison Fund  
Lilly Endowment Inc.  
Dr. Wylie & Ann McGlothlin  
**Howard Marshall Memorial Fund**  
**Dr. Thomas Mastin Memorial Fund**  
**Beverly & Duane Matthews Family Fund**  
John & Judy Melton  
Thomas B. Millikan Trust

*Continued on next page*

Modernfold, Inc.  
 Albert "Bud" & Marilyn Montgomery  
 Dick & Bonnie Myers  
**New Castle High School Class of 1924**  
**New Castle High School Class of 1952**  
**New Castle High School Class of 1953**  
**New Castle High School Class of 1963**  
**New Castle High School Class of 1974**  
**Linda L. Newman Fund**  
 Lois Wiggins Newman Fund  
 Pavy & Walker Family Fund  
 Felice Payne Trust  
 Amanda Peed Trust  
 Permanent Endowment  
 The Pfenninger Fund – J. J. (Jake), Paul F.  
 & Steve Pfenninger  
**John & Jane Pidgeon**  
 Mr. & Mrs. Luther Pidgeon  
 Pritchett Backhoe Service  
 Thomas & Valorie K. Ratcliff  
 James & Joyce Ray  
 J. Douglas & Myrna Reeves  
**Dick & Carolyn Riley**  
 Dr. Robert & Charlotte Rogers  
 Memorial Fund  
**Jerry Schaeffer Honorarium**  
 Clarence & Edna Burgess Scott  
 Claudia Bland Scott Memorial  
 Ernest G. & Bonnie B. Scotten  
 Rex & June Slick  
 Mr. & Mrs. Jeffrey Smiley  
 Kevin & Angela Tague  
 TASC Named Fund  
 J. Newton Turner Trust  
 Fred & Charlotte Walker  
**Walker Family Fund**  
 Westwood Country Club  
 Mildred Wiggins Bacon & George  
 Wiggins  
 Joyce Wilhelm  
 Jerry Wright Trust  
 James Wrin Memorial

## Agency Endowment Funds

*Agencies and organizations create endowment funds as a way to secure their future. By establishing an endowment within the Henry County Community Foundation, the nonprofit group builds assets that the Foundation will manage. This year, grants totaling \$72,232 were awarded from Agency Endowment Funds.*

**Art Association of Henry County**  
**Big Brothers Big Sisters of Henry County**  
**Campbell/Rea PEO - Chapter H**  
**CASA\***  
**Healthy Communities of Henry County**  
**Henry County Art Center Fund**  
 Fred R. & Betty McDonald Mann Fund  
 Mary Jane Mustin, in memory of Claude &  
 Louise Stanley  
 Verl & Betty Shaffer Fund  
**Henry County Community Foundation**  
 Operating Endowment  
 Howard & Phoebe Brammer Memorial Fund  
 Silver Anniversary Fund  
**Henry County United Fund**  
**Henry County YMCA**  
 Shore Family Fund  
 Roger Simpson Memorial Fund  
**Historic Knightstown, Inc. Fund**  
**Honey Creek Church Designated**  
 Endowment Fund  
**Hoosier Gym Community Center of**  
 Knightstown, Inc.  
**Humane Society Endowment Fund**  
 Mary Lee Buschmann Named Fund  
 Knightstown Public Library  
**Mental Health Association of Henry County**  
 Meridian Services  
 Middletown-Fall Creek Library Fund  
**Middletown Historical Society Endowment**  
 Fund  
 Middletown United Methodist Church Fund  
**Leonard H. Mitchell Trust – Henry County**  
**Historical Society**  
 New Castle Evening Kiwanis Frank  
 Solomon Endowment Fund

**New Castle-Henry County Public Library**  
 Walter & Ann Chambers Fund  
 Robert & Jeri Horn Fund  
 Robert Malcolm Fund  
 Mr. & Mrs. J. Byron Miller Fund  
 Taylor "Tim" I. Morris Fund  
 E. L. & Lois Wiggins Newman Fund  
**PEO-Chapter AD**  
**Raintree Friends Housing, Inc.**  
**Red-tail Conservancy, Inc.**  
**Second Harvest Food Bank**  
 Spiceland Public Library  
**St. James Episcopal Church Endowment**  
 Fund  
**Westminster Community Center Fund**  
**Wilbur Wright Birthplace Preservation**  
**Society**  
 Marvin & June Luellen Fund

*\*non-permanent fund*

## Donor Advised Funds

*This year, the Henry County Community Foundation awarded \$9,878 in grants to organizations recommended by their donors. This type of fund is especially helpful for donors, who for tax or estate planning reasons, want to take a tax deduction one year and spread the contributions over future years.*

**Anonymous Family Fund**  
**Alan Broyles Memorial Endowment Fund**  
**Donald C. & Patricia Peterson**  
 Danielson Endowment  
**George & Rilla Denton Endowment**  
**Harry E. & Viola C. Fadely Family**  
 Endowment  
**Archie & Hilda Frost Memorial Fund**  
**Ruth & Bill Hayworth Family**  
 Endowment  
**Elsie Kline Memorial Donor Advised Fund**  
**Richard & Bonnie Myers Endowment**  
**Nine Star Connect Ray of Light Fund**  
**Marian H. & Paul W. Prior Endowment**  
**Jeff & Judy Ray Endowment**  
**William & Michelle Sponsler**

## Field of Interest Fund

*Field of Interest Funds allow donors to address an issue or cause they care deeply about without naming specific charities. The Foundation takes a contributor's concerns into consideration when making grants to appropriate programs that fit within the donor's category of concern. This year the Foundation awarded \$22,352 from Field of Interest Funds.*

**Jack & Kathy Anderson Endowment Fund** – designated to help young people in the New Castle Henry County community grow in their development of learning, experiencing and mastering a foreign language  
**Harold E. & Imogene M. Caine Memorial Fund** – designated for needy children during the holidays  
**George W. Hand Fund for Education** – designated for academic pursuits of New Castle Community School students  
**Jean Bond Hough Foreign Exchange Student Endowment Fund** – designated for expenses of foreign students attending New Castle High School and local students traveling abroad for study  
**Knightstown Pay it Forward Community Fund** – designated for the town of Knightstown  
**Grandma Katie McClure Reading Endowment Fund** – designated to improve literacy in elementary students  
**Larry McCord Memorial Fund** – designated to aid food pantries throughout Henry County  
**Women's Circle of Friends Endowment Fund** – designated for issues pertaining to women and girls medical, physical, and emotional well being

## Designated Funds

*The Henry County Community Foundation awarded \$216,695 in grants from Designated Funds in 2014. These funds benefit specific eligible organizations selected by the donor. If an organization ceases to exist or changes its purpose, the Foundation Board of Directors preserves the donor's intention by redirecting the funds to an organization with a similar purpose.*

**G. William & Adaline C. Bailey Fund** – designated for Westminster Community Center

**Harry J. Bailey Endowment Fund** – designated for Big Brothers Big Sisters of Henry County

**Kent Benson Fellowship of Christian Athletes** – designated for FCA camp and local FCA events

**F. Kennett & Mary P. Broome Memorial Fund** – designated for Spiceland Preservation and Tourism Society

**F. Kennett & Mary P. Broome for Town of Spiceland** – designated for Town of Spiceland

**Dr. Arthur B. Burnett Fund** – designated for the Henry County Humane Society

**Dr. Arthur B. Burnett Fund** – designated for the Henry County Memorial Hospital

**Ira F. & Martha H. Burr Family Fund** – designated for the Middletown Historical Society

**James W. Caldwell Family Fund** – designated for the F&AM Lodge #91

**Catastrophic Fund** – designated to help with catastrophic events

**Fred E. & Catherine Brennehan Carpenter Fund** – designated for the Henry County Saddle Club

**Scott B. & Helen H. Chambers Gift of Nature** – designated for a fountain at the Art Center

**Wilbur M. Coffin Memorial Fund** – designated for the Christian Love Center

**Company I, 152nd Infantry, 38th Division** – designated for the upkeep of the WWII Memorial

**Ruth & Charles Creech Family Fund** – designated for the Henry County Community Foundation for Unrestricted Fund for Community Grants and New Castle Noon Optimists

**Dye Family Fund** – designated for the Mt. Summit Christian Church

**Harriet Chambers Eden Fund** – designated for the First Presbyterian Church and/or music

**Lee & Virginia Fadely Fund** – designated for Honey Creek Church

**Fairy Tale Theatre Endowment Fund** – designated for Fairy Tale Theatre Productions

**Walter “Duke” Falck Memorial Fund** – designated for New Castle Little League

**Cora E. Foust Trust** – designated for the Henry County Memorial Hospital Foundation, Henry County United Fund, Henry County YMCA, Emergency First Aid Unit, Indiana Easter Seals Society, First Methodist Church, Christian Culture Class of the First Methodist Church, and the Henry County Chapter of the Indiana Heart Association

**Richard P. Franklin Charitable Fund** – designated to be divided equally for the First Nighters, Inc, Raintree (Guyer) Opera House Guild, and Camp Riley for youth with physical disabilities

**Pascal E. Garner Endowment Fund** – designated for Trinity Methodist Church, Henry County Heart Society, Henry County Cancer Society, Little Red Door, and Salvation Army

**Robert E. & Mildred Garner Fund** – designated for New Castle First United Methodist Church, New Castle-Henry County Public Library, and First Aid Unit

**Garvin Family Charitable Fund** – designated for First United Methodist Church of New Castle, Raintree Habitat for Humanity, Salvation Army of New Castle, and Henry County Humane Society Animal Shelter

**Bobby Goodwin Memorial Fund** – designated for Raintree Habitat for Humanity

**William R. Heck & Marceline Heck Family Fund** – designated for the Henry County YMCA

**Philip Heilman Family Fund** – designated for the Salvation Army, First Presbyterian Church of New Castle, and the New Castle Evening Kiwanis Club

**Henrico, Inc. – Bennett House Endowment Fund** – designated for Henry County Emergency Services and the Henry County Red Cross

**Henry County Post Secondary Education Council Technology Fund** – designated for technology upgrades at the Danielson Learning Center

**Henry County Retired Teachers/Reading Council Grant Fund** – designated for grants to Henry County teachers for special programs

**Henry County YMCA Activity Awards Fund** – designated to purchase awards for youth participating in YMCA programs

**Raymond Hess Family Fund** – designated for the Middletown Historical Society

**Hoover-Cleveland Fund** – designated for the New Castle Community School Corp.

**Ivy Tech Community College Henry County Fund\*** – designated to support the Ivy Tech Henry County campus

**T. Michael Jackman Memorial Endowment Fund** – designated for Henry County YMCA Preschool

**L. G. & Esther Jacobs Fund** – designated for New Castle-Henry County Public Library

**William E. Jones Memorial Trust** – designated to be divided equally with First Methodist Church of New Castle, Henry County YMCA, and Henry County Community Foundation, Inc.

**Annabelle M. Lee Memorial Fund** – designated to be divided equally to Friends Meeting House, Tri Elementary and Wilbur Wright Elementary as an award for teacher

with innovative ideas, programs, or projects

**Gladys M. Lee Memorial Fund** – designated for South Henry Dollars for Scholars, Wilbur Wright Birthplace Preservation Society, and the Salvation Army

**Curtis Marcum Memorial Endowment Fund** – designated for the New Castle-Henry County Public Library and Henry County Humane Society

**Howard Marshall Memorial Fund** – designated for F&AM Lodge and Religious Society of Friends of New Castle

**Wylie G. & J. Ann McGlothlin Fund** – designated for Henry County Young Life, and Big Brothers Big Sisters of Henry County

**Valentine, Adah & Martha Mendenhall Fund** – designated for First Presbyterian Church Summerfest

**Sally Smiley Meredith Named Fund** – designated for the Smiley Family Fund

**Penny Knotts Miller Memorial Fund** – designated for books for New Castle elementary students

**Modernfold, Inc.** – designated for the Henry County Concert Series

**Glen Mogle & Marietta Mogle Family Fund** – designated for the Friends Church of New Castle for youth attending Quaker Haven camp

**Mary Morris Summer Art Days Fund** – designated for the Art Association of Henry County summer programs

**T. Leonard & Lillian T. Nelson Endowment Fund** – designated for the Art Association of Henry County

**New Castle Clinic, Inc. Endowment** – designated for Young Life of Henry County

**New Castle High School Class of 1946 Fund** – benefiting Trojans Remembered Fund

**New Castle High School Class of 1949 Fund** – Memory of Margaret Antle Scott – Benefiting Trojans Remembered Fund

*Continued on next page*

**New Castle High School Class of 1958** – designated for New Castle Schools

**New Castle High School Alumni Homecoming Fund\*** – designated to support the NCHS Homecoming Festivities through the New Castle Alumni Association

**New Castle Evening Kiwanis Club Endowment for Youth** – designated for Kiwanis Youth Activities

**J. Ronald Newlin Indiana Basketball Hall of Fame Volunteer Fund** – designated for recognition of the volunteers at the Indiana Basketball Hall of Fame

**Lois Wiggins Newman Fund** – designated for the Unrestricted Fund for Community Grants and the Operations Fund of the Henry County Community Foundation, American Historical Print Society, and Western College Alumni Association

**Bernice Nichols Memorial Fund** – designated for Spiceland Preservation and Tourism Society

**Norfleet Open Cancer Fund in memory of Bill Shockley and Danny Justice** – designated for the IU Health Ball Memorial Hospital Cancer Center at Forest Ridge

**Prior Memory Garden Endowment Fund** – designated for maintenance and upkeep of memory garden within South Mound Cemetery

**Robert & Tina Provost Fund** – designated for the Honey Creek United Methodist Church

**Clarence Everett Riley & Julia Marie Fadley Riley Endowment Fund** – designated for the Honey Creek United Methodist Church

**James & June Rohrbach Fund** – designated for the Honey Creek Church

**Edwin & Miriam Russell Family Fund** – designated for the Middletown Historical Society

**Harry Sanders Fund** – designated for the Honey Creek United Methodist Church

**Franklin John Schwegman & Judith A. Heavin-Schwegman Fund** – designated for Healthy Communities, Humane Society of Henry County, and Art Association of Henry County

**Shaffer Picture Fund** – designated for the Art Association of Henry County to care for and maintain the paintings of Betty Shaffer

**Joseph J. Shapiro Fund** – designated for awards for Outstanding Retired Teacher and Baseball's MVP in the New Castle Community School Corporation

**Sharp Twins Memorial** – designated for the Henry County YMCA Camp Tecumseh scholarships

**Smiley Family Fund** – designated for Teacher Award for a Henry County teacher

**Edith F. Smith Trust** – designated for the First Methodist Church, Emergency First Aid Unit, the Henry County Heart Society, the Henry County Memorial Hospital Foundation, and the Henry County YMCA

**Charles & Phyllis States Memorial Fund** – designated for the Danielson Learning Center technology

**Raymond & Hazel Stohler Fund** – designated for First Christian Church of New Castle

**Sam & Stella Stout Memorial Forest Fund** – designated for the upkeep, programs, and operations at the Sam & Stella Stout Nature Preserve through the Red-tail Conservancy

**Strong Family Fund** – designated for Henry County Young Life

**Mary Eva Thornburg Trust** – designated for the First Christian Church of New Castle, Kennard Christian Church, Henry County Red Cross, Henry County YMCA, Henry County Heart Society, and the March of Dimes

**Trojans Remembered** – designated for educational activities for New Castle High School

**William & Dorothy Vaughn Endowment** – designated for the First Presbyterian Church

**Weidert Family Fund** – designated for the Art Association of Henry County

**George Eugene Williams & Marilyn D. Williams Endowment Fund** – designated for the First United Methodist Church of New Castle

**Robert & Jean Wisheart Fund** – designated for Middletown/Fall Creek Library and Shenandoah School Corporation

**Ellen Saint Woods Memorial Endowment** – designated for the Henry County YMCA

**J. Warren & Nila Worl Family Fund** – designated for Mooreland Historical Society

## Legacy Gifts and Bequests Life Estates

*A Life Estate is a gift of the remainder interest in a personal residence or farm by irrevocably transferring the title to the Foundation while retaining the right to the use of the property during their life.*

Donald C. & Patricia Peterson Danielson Life Estate

## Life Insurance

*Life insurance provides a simple way for you to give a significant gift to the Foundation with tax benefits that you can enjoy during your lifetime.*

Juanita Sheward

## Charitable Gift Annuities

*Charitable Gift Annuities are funds established by donors who have made a gift to the Foundation and retain a lifetime income interest. At their passing, the remainder will be used for charitable purposes.*

Richard & Mary Lea Apple Charitable Gift Annuity – I

Richard & Mary Lea Apple Charitable Gift Annuity – II

G. W. & Adaline Bailey Charitable Gift Annuity

Mary Lee Buschmann Charitable Gift Annuity – I

Mary Lee Buschmann Charitable Gift Annuity – II

R. Morris & Shirley C. Edwards Charitable Gift Annuity

Dr. Gary & Jeanine Ann Metzger Charitable Gift Annuity

James & Jean Overmyer Charitable Gift Annuity

James & Joyce A. Ray Charitable Gift Annuity

## Future Funds as of December 31, 2014

All 4 Kids Endowment Fund

Barr Family Scholarship

Jean E. Gordnier Becker Fund

Business & Professional Women Inc. of New Castle

Dunreith Community Named Fund

Deloris Jane Goodwin Billings Fund

Robert & Sally Howard Memorial Fund

Eldon (Eck) Huffman Pap's Pocket Fund

Pat & Gerald Malott Family Named Fund

Dr. James & Judy Myers 25th Anniversary Honorary Fund

New Castle-Henry County Chamber of Commerce Scholarship Fund

New Castle High School Class of 1982

New Castle High School Class of 1986 Scholarship Fund

Rick Penn Honorary Scholarship

Charlene Perry Fund

"Petey's Playhouse" for the Love of Animals Endowment Fund

Norman Rust Fund

Harry & Mary Shaffer Memorial Fund

Danny Shelton Memorial Fund

Special Olympics Endowment Fund

Spiceland Community Named Fund

Stigall Family Named Fund

Cheryl & Montford Switzer Scholarship Fund

Dr. Anthony J. Trisari Memorial Scholarship

Max & Gus Upchurch Named Fund

Cindy Lou Watson Memorial Fund

Ray White Scholarship Fund

William (Bill) Woods Memorial Scholarship

## Scholarship Funds

*This year, the Foundation awarded 233 scholarships totaling \$324,325 to assist students pursuing a higher education. All scholarship recipients for 2014 are listed on the Foundation's website at [www.henrycountycf.org](http://www.henrycountycf.org). Scholarships are great for donors wishing to invest in Henry County through higher education. Scholarships may be used to further the education of graduates from a particular high school, students in a specific field, or those enrolled at a chosen institution. Donors are able to set the criteria for applicants.*

**Lea Rae Alexander Memorial Scholarship** – South Henry Dollars for Scholars  
**Alford Family Scholarship** – New Castle High School seniors  
**Tyler Eugene Atkinson Memorial Scholarship** – Shenandoah seniors  
**Herbert & Hallie Axe Memorial Scholarship** – New Castle High School seniors  
**LaVaughn Bailey Memorial Scholarship** – Henry County nursing students  
**Basler Family Scholarship** – New Castle High School seniors  
**Joseph Russell Bimber Memorial Scholarship** – Tri High School graduating senior majoring in education or counseling  
**Birds Eye Foods, Inc. – Brooks Foods Agri-Link Foods Scholarship** – Henry County graduating senior majoring in an agribusiness or foods related field  
**Troy Blevins Memorial Scholarship** – Tri High School graduating senior  
**Blue River Valley Optimist Club Scholarship** – Blue River Valley High School graduating seniors  
**Dr. Philip & Wilma Borders Scholarship** – New Castle High School graduate attending Indiana State University

**Ida M. Bravard Scholarship** – Tri High School graduating senior in the top ten percent of class  
**Gaylord "Doc" and Blanche Brinson Scholarship** – Blue River Valley graduating senior and FFA participant attending Purdue University  
**Helen Ellis Brown Scholarship for Academic Excellence** – Tri High School graduating senior majoring in business, management or accounting  
**Mary Lovely Brumback Scholarship** – Henry County resident majoring in education  
**Herbert L. Bunch Named Fund** – benefits the New Castle Class of 1950 Alumni Scholarship  
**Bob Bunton Memorial Wrestling Scholarship** – New Castle High School graduating senior and wrestling team member  
**Roger Burke Memorial Scholarship** – New Castle High School graduation senior majoring in nursing  
**Business Network International Scholarship** – Henry County high school graduating senior majoring in business  
**William F. Byrket Scholarship** – Post-secondary Henry County residents in their junior or senior year  
**Viva Campbell Nursing Scholarship** – New Castle High School graduating senior majoring in nursing  
**Jeff Carman Memorial Scholarship** – New Castle Career Center student attending technical or vocational college  
**City of New Castle Scholarship** – New Castle High School graduating senior living in Henry Township  
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**John P. & Janet L. Cleveland Scholarship** – New Castle High School graduating seniors majoring in business or marketing

**Clifford Joe & Violet Crane Memorial Scholarship** – New Castle High School graduating senior  
**William T. & Suzanne Davis Scholarship** – Shenandoah High School graduating senior attending a vocational or trade school  
**Pauline Dickerson Scholarship** – outstanding Henry County high school art student  
**John & Helen Dickey Scholarship** – Knightstown Alumni Association to award scholarships  
**Dollars for Scholars/Shenandoah High School** – Shenandoah seniors  
**Bess Doty Scholarship** – New Castle High School graduating senior  
**Joseph Dykhuizen Memorial Scholarship\*** – New Castle High School Trojan Warrior  
**East Central Opportunities Scholarship** – Henry County resident attending Ivy Tech Community College  
**Daniel Edington Memorial Scholarship** – Henry County graduating senior who participated in 4-H  
**Sylvia J. and Malcolm K. Edwards Scholarship** – New Castle High School graduate  
**Sylvia Edwards Named Fund** – benefits the Opportunities Unlimited Scholarship  
**Natalie Edwards Memorial Scholarship** – New Castle High School graduating senior  
**Irvin A. & Leona Fahr Scholarship** – Crawford County High School graduating seniors  
**Robert A. & Lucille S. Farmer Scholarship** – Knightstown High School graduating senior attending Purdue University  
**D. Ted Fitzgerald, Jr. Scholarship** – New Castle High School graduating senior who participated in extracurricular activities  
**Alice Ann Garner Scholarship** – New Castle High School graduating senior

**General Scholarship Endowment** – New Castle High School graduating senior  
**Greg Geozeff Memorial Scholarship** – New Castle High School graduating senior  
**Miles M. & Alice N. Goodwin Scholarship** – New Castle High School graduating senior attending Purdue University majoring in engineering or dietary  
**Sarah Marie Gould Memorial Scholarship** – Shenandoah Dollars for Scholars  
**Jessica Hale Memorial Scholarship** – Henry County graduating senior and 10 year 4-H member  
**Dr. Benjamin Harrison/Judge John H. Morris Scholarship** – Henry County high school graduating senior attending Indiana University  
**Henry County Medical Society - Dr. Donald Vivian Scholarship** – Henry County high school graduating senior majoring in a medical field  
**Henry County Sheriff's Department Scholarship** – Henry County resident who attended Sheriff's Camp and is pursuing certification or degree in emergency services or law enforcement  
**Higher Education Scholarship for Children of Draper Employees**  
**Vernon B. Hill Scholarship** – Henry County graduating senior and member of First Friends Meeting  
**Hinsey-Brown Scholarship** – Henry County resident majoring in mortuary science, music or ministry  
**Dr. Larry J. Horney Scholarship** – New Castle High School graduating senior majoring in communications, journalism or education  
**Harold D. Huffman, Jr. Scholarship\*** – New Castle High School senior  
**Janice Paige Hughes Scholarship** – Henry County residents and 3rd or 4th year special education major

*Continued on next page*

## Scholarship Funds (cont'd)

**Irene Bovender Wade Hunley Scholarship**

– New Castle High School graduating senior attending First Baptist Church

**Jackman Education Fund Scholarship**

– Henry County graduating senior pursuing a liberal arts major

**Richard P. Jennings Scholarship**

– graduating senior who participated in the annual Indiana Basketball Hall of Fame Classic

**Robert E. & Dottie B. Jones Scholarship**

– qualified Byrket Scholarship applicant

**John M. Jordan Scholarship**

– New Castle High School graduating senior

**Gertrude “Trudy” Joyner Memorial Scholarship**

– New Castle High School graduating senior

**Jack Keith Memorial Athletic Scholarship\***

– New Castle High School senior baseball player

**Hubie King III Memorial Scholarship**

– Shenandoah High School graduating senior

**Knights of Columbus Ladies Auxiliary Scholarship**

– Henry County high school graduating senior of the Catholic faith

**Sylvira Flannigan Koons Scholarship**

– Henry County nursing student

**Lacy/Walradth Scholarship**

– Henry County high school graduating senior majoring in a social science

**Scott Lewis “Gus” Larrison Memorial Scholarship**

– Henry County high school graduating senior majoring in the communications field

**Matthew E. Lee 4-H Scholarship**

– Henry County graduating senior attending Purdue University

**Lilly Endowment Community Scholarship**

– Henry County graduating seniors

**Mary Adelaide Long & Pierre “Pete” Long Scholarship**

– New Castle High School graduating senior attending Butler University

**John B. & Justine Luellen Memorial Scholarship**

– South Henry Dollars for Scholars

South Henry Dollars for Scholars Named Fund

**Magna Machine Dick Culy Memorial Scholarship**

– Henry or Wayne Co. resident pursuing certificate, 2 or 4 year degree

**Eugene “Bud” & Nina McCall Scholarship**

– Henry County high school graduating senior

**Carl McClure Memorial Scholarship**

– New Castle Career Center student

**Jessy Lee McClure Memorial Scholarship**

– New Castle High School graduating senior

**Frank C. & Lauretta R. McDonald Scholarship**

– Henry County high school graduating senior pursuing a medical related degree

**McKown Studios Scholarship**

– Graduating high school senior with senior portraits taken at McKown Studio & Galleries

**Donald E. & Martha L. Sherman McNeil Family Scholarship**

– Shenandoah graduating senior or graduate majoring in business, nursing, engineering or education

**Herby Meredith Memorial Scholarship**

– New Castle High School graduating athlete

**Charles & Grace Modlin Scholarship**

– New Castle High School graduating seniors or grants to 6th grade teachers at Riley Elementary

**Mary Louise Modlin Scholarship**

– Non-traditional students attending Indiana University East Danielson Center

**Aaron Montgomery Memorial Vocational Scholarship**

– New Castle Career Center machine trades, welding technology, building trade, or pre-engineering students

**Judge John M. Morris Scholarship**

– Henry County high school graduating seniors attending Indiana University

**Francis & Marian Mundell Nursing Scholarship**

– Shenandoah High School graduates returning to school

**Mark & LaRue Myers Scholarship**

– New Castle High School graduating senior

**Laura Hamm Neal Memorial Scholarship\***

– New Castle High School senior athlete

**New Castle Breakfast Optimist Scholarship**

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**New Castle High School Alumni Association Scholarship**

– New Castle High School graduating senior

**New Castle Class of 1950 Scholarship**

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**New Castle Class of 1954 Scholarship**

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**New Castle Class of 1960 Scholarship**

– New Castle High School graduating senior

**New Castle Class of 1966 Scholarship**

– New Castle High School graduating senior

**New Castle Class of 1969 Scholarship**

– New Castle High School graduating senior

**New Castle Noon Optimist Club/Thelma Cluggish O’Reilly Memorial Scholarship**

– New Castle High School graduating senior

**E. L. & Lois Wiggins Newman Fund**

– benefits the LaVaughn Bailey Memorial Scholarship

**Linda L. Newman Scholarship**

– Henry County residents

**Opportunities Unlimited Scholarship**

– Henry County students pursuing certification, associates or bachelors degrees

**Parkview Family Dentistry Scholarship**

– New Castle High School graduating senior pursuing a health care related major

**Ray Pavy Spirit Award Scholarship**

– Students attending post-secondary classes in Henry County

**Perfect Circle Credit Union Scholarship**

– Henry County high school seniors

**Dorothy Wayman Pfenninger Scholarship**

– Henry County graduating seniors majoring in music

**Luther & Marian Pidgeon Memorial Scholarship**

– Knightstown Alumni Association scholarships

**Luther Pidgeon Memorial Scholarship**

– South Henry Dollars for Scholars scholarships

**Lewis M. Poindexter Named Fund**

– benefits the New Castle Class of 1950 Alumni Scholarship

**Charlie & Bernice Popplewell Memorial Scholarship**

– New Castle High School graduating senior majoring in education

**Preble Family Scholarship**

– New Castle High School graduating senior

**Purdue Opportunity Award Scholarship**

– Henry County graduating seniors attending Purdue University

**Ray Family Scholarship**

– Henry County residents after their freshman year of college

**Brady Reese Memorial Scholarship**

– New Castle High School graduating senior who participated in band

**Jack Renner Vocational Scholarship**

– New Castle High School graduating senior who was enrolled in the New Castle Career Center for two years, demonstrates financial need, seeking vocational degree

**Hobart & Helen Risley Family Scholarship**

– Henry County high school graduating senior

**James & Joy Robbins Scholarship**

– New Castle High School graduating senior

**Dr. David A. Roth Named Fund**

– benefits the New Castle Class of 1950 Alumni Scholarship

**Juanita Jane Rucker Scholarship for Humanities**

– New Castle High School graduating senior

**Charles & Ruth Sahlberg Scholarship** – New Castle High School graduating senior

**Dr. William K. Saint Scholarship** – Henry County residents attending I.U. School of Medicine, second year or higher

**Dr. Mark & Jan Smith Scholarship** – New Castle High School graduating seniors pursuing a medical or education degree

**Gordon Sparks Trust Fund Scholarship** – Henry County nursing students in their third or fourth year of clinical studies

**Seth A. & Amy J. K. Stevens Scholarship** – Tri High graduating senior attending IU Kelly School of Business

**Johnathan C. Strong Memorial Scholarship** – South Henry Dollars for Scholars

**E. Wayne Swayzee Family Scholarship** – New Castle High School graduating senior attending an Indiana college or university

**Cecil & Wayne Tague Scholarship** – New Castle High School graduating senior

**Letha Taylor Memorial Nursing Scholarship** – New Castle High School graduating senior pursuing a nursing degree

**Kelly Thompson Opportunity Scholarship** – Tri High School graduating female

**Marilyn Tomey Memorial Scholarship** – Henry County graduating senior pursuing a nursing degree

**Judy Trennepohl Scholarship** – Shenandoah High School graduating senior, nursing major

**VFW Post 1282 Scholarship** – Senior from each of the five county schools who is the descendent of a veteran

**Linda Walls Memorial Scholarship** – New Castle High School graduating senior and education major

**Jessica Lynn Wantz 4-H Scholarship** – Henry County resident graduating senior and 10 year 4-H member

**Richard Whalen Memorial Named Fund** – benefits the New Castle Class of 1950 Alumni Scholarship

**Joseph White Scholarship** – Knightstown High School graduating senior with financial need

**Wilfong Girls' Basketball Award & Scholarship** – Knightstown High School graduating senior and female basketball player

**Dr. Guido P. Wilhelm Memorial Scholarship** – Henry County high school graduating senior and entering the medical field

**Benjamin F. Williams Jr. & Myra E. (Edwards) Williams Memorial Scholarship** – Henry County students including home schooled students

**Witham Family Scholarship** – Shenandoah graduating senior pursuing associates or bachelors degree

**Roy F. & Ima C. Wirth Family Scholarship** – benefits the Jackman Educational Trust

**Frederick V. & Mary Couch Wood Scholarship** – New Castle High School graduating senior

## Sixth Grade Teacher Recognized for Excellence Nancy Wadman

By Beverly Matthews

Nancy Wadman, sixth-grade teacher at Tri Elementary, was the recipient of the 2014 Teacher Excellence Award. Ms. Wadman was awarded a certificate of recognition at Tri Elementary's Honor Day program on May 28 from the Henry County Community Foundation.

"We have many outstanding educators in Henry County and we are honored that donors in our community want to recognize these teachers and let them know how much we appreciate their great work," said Beverly Matthews, president of the Foundation.

Wadman, retiring this year, has 39 years of service to the South Henry School Corporation. Some of the comments about this teacher were: "She has positively impacted multiple generations in our community;" "She's a well-loved and respected educator;" "Ms. Wadman is a great resource, leader and very willing to help as needed." In addition, words like "commitment," "faith," "kindness," "generosity," "selfless acts," and "humble attitude" were also expressed.

The Teacher Excellence Award is the highest honor the Foundation can



*Nancy Wadman, 2014 recipient of the Henry County Community Foundation Teacher Excellence Award, is a sixth-grade teacher at Tri Elementary School.*

bestow on an individual in education. The honor is designed to recognize teachers who have demonstrated an unusual commitment to inspire students to reach for difficult and lofty goals. Persons to be recognized have earned the respect of students, parents and peers through sustained effort, high moral standards and the likelihood of enduring beneficial effects on the students with which they have worked.

## Together We Build a Better Tomorrow

The Henry County Community Foundation is a public charity. Small donations are just as important as large donations to make sure that we serve the public's best interests. Our support for the community does not come from just one person, one family, or one company but a steady stream of contributions from a broad cross-section of the general public.

If you have a cause you care about in the community, we have a fund to support your interest. It's easy to make a donation online from our website at [www.henrycountycf.org](http://www.henrycountycf.org), use our automatic deposit to build a fund whose mission you believe in or send in a check to benefit the community.

We invite you to join us with a gift to your favorite cause or charity through the Henry County Community Foundation. Be part of your public Foundation and join us in strengthening our community through small, consistent gifts over time. Thank you for joining our movement because we are here for good. As Helen Keller observed in her wisdom, "Alone we can do so little, together we can do so much."

We sincerely appreciate all gifts – large or small – which help build the permanent endowment of Henry County.

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Kelly & Nancy Idiart  
Independence Cattle Farms  
Indiana Farm Bureau Insurance  
Indiana Philanthropy Alliance  
Jeff & Lynda Jackson  
Cory Jones  
Russell & Sonya Jones  
Stephen & Wanda Jones  
Todd & Jamie Judy  
Mary Kaniewski  
John & Marjorie Karvonen  
Edward & Kathleen Kaucher  
Kathleen Y. Kegley  
Barry Keith  
Gay Keith  
John & Nancy Kellam  
Erma & G. Con Keller  
Vicki Kelsey  
Howard & Lois Kendall  
James & Debra Kendall  
Lynn Kennedy  
Autumn Kent  
Keystone Class, Friends Church  
Teresa & C. Martin Kidd  
Mervin & Elsie Kilmer

Kyle & Kristine Kimball  
Joann King  
David & Carolyn Kingen  
Pamela Kinkade  
Karen & Joel Kirby  
Nadine Kirkpatrick  
Wayne Klein  
Erin H. Klug  
Knightstown Elevator, Inc.  
Knightstown Friends Church  
Lyle & Janet Koger  
Harry & Betty S. Kremer  
Krieger Farms  
M. Ellen Lacey  
Gene & Maxine Lacy  
Jeffery & Linda Lane  
Michael & Linda Langford  
Jeffrey & Jennifer Lathrop  
Joseph W. Leakey  
Robert & Marie Lee  
William & Char Lee  
Mike & Paulette Lees  
Dorothy Lefkowitz  
Richard & Mary Leitch  
Fred & Nancy Lewis  
Judith A. Lewis  
Julia Long  
Janice Lovell  
Rick & Donna Lowhorn  
Luellen Farms Inc. & LP Gas Service  
Dalton Lundy  
Judy MacDonald  
Ken & Lucinda Mace  
Dave & Amy Maddy  
Magna Machine & Tool, Inc.  
Teresa & Michael Major  
Wayne & Mary Malone  
Randy & Brenda Maloyed  
Ada Marcum  
John & Judy Marlatt  
Michael R. Marsh  
Chuck Martin  
John R. Martin  
Joseph & Susan Martin  
Denny H. Mason  
Susanne Massey  
Elizabeth Mastin

Jeffrey & Kimberly Matsuoka  
Beverly & Duane Matthews  
Daniel May  
David & Carin McAtee  
Lewis E. McAtee  
Eldon & Patsy McCammack  
Gene & Carla McClure  
Bill & Enid McClurg  
Jackie McCrobie  
Frank & Jane McCrocklin  
Jon McCutcheon  
Lis McDonnell  
Bob McElroy  
Rebecca McGrady  
Jameson & Janet McGrew  
James & Tracy McIlrath  
Vickie McIntosh  
Christina McKee  
William & Melba Jane McKnight  
Elizabeth A. McLane  
Trent & Doris McWilliams  
Eugene & Debbie Meek  
Vance & Lynn Meier  
Jeffery & Leah Meinders  
W. Carey & Jama Mercer  
David Meredith  
Gary & Lana Merritt  
Gary & Elizabeth Metroka  
Larry & Norma Meyer  
David & Janet Miller  
Lee Miller  
Lloyd & Joyce Miller  
Mary Miller  
Roger & Teresa Miller  
Shirley E. Miller  
James E. Millikan  
Nathan & Melissa Millikan  
Martha Minnick  
Tony & Jody Mitchell  
Pamela Moore  
Richard & Pattie Moore  
Ronald & Alice Moore  
Jeff Morgan  
Anthony & Susanne Morreale  
Jane Moyer  
Jerald & Sarah Murphy  
Gerald & Natalie Myers

*Continued on next page*

Robert & Carolyn Myers  
Timothy & Sarah Myers  
Todd & Colleen Myers  
James & Katy Nelson  
New Castle Alumni Association  
New Castle Basketball League Evening Optimist  
New Castle Class of 1963  
New Castle Class of 1989  
New Castle Noon Optimists  
Russell & Patricia Nichols  
Todd & Sherri Nierste  
Nico & Milly Niessen  
Noble Roman's Pizza  
Robert & Dorothy Norris  
Nu-Tec  
Winona G. O'Neal  
Stefanie Onieal  
Robert & Cathy Osborne  
Martha Overmyer  
P.E.O. Chapter H  
Wendy S. Padgett  
Charles & Kathleen Painter  
Donald & Eleanor Painter  
Freida Painter  
Dian Paquet  
Jeffrey & Kristen Parmelee  
James & Nancy Pasman  
Bryan & Brenda Paugh  
Richard & Cynthia Peck  
Jack Peckinpough  
Rex & Bonnie Peckinpough  
D. Rick & JoAnn Penn  
Carol Penrose  
Lynn & Lucinda Perdue  
Dr. P. Neil Perrel  
Ronald M. Peters  
Michael & Nancy Peyton  
Frank & Wanda Pfenninger  
Marcelle Pfenninger  
Pfizer Foundation Matching Gifts Program  
Pete Pheffer  
Tina Phelps  
Marion & Sandra Pierce  
Eddie Pirtle  
Donald & Patricia Platts  
Porter & Jeanne Poindexter

Nanette & Doug Polk  
Carly Poor  
Truman Pope  
PrimeTime-AgriMarketing Network  
James & Kathryn Proctor  
Sandra S. Pruim  
Philip & Janet Puckett  
Duane & Peg Queener  
Earl & Joyce Rains  
Eric & Linda Rauch  
Scott & Cynthia Rauch  
Michael Rawlins  
Dixie Ray  
Michael & Barbara Ray  
Melanie Razor  
RBCG, LLC dba Big O Tires New Castle  
David & Jean Real  
Douglas & Alice Reece  
M. Jane Reece  
Paul & Brenda Reece  
Philip & Norma Reece  
Virginia Reeves  
Chris & Melanie Renner  
Priscilla S. Rhoades  
Shirley Richardson  
Daniel & Rosalind Richey  
Dale & Vicki Riggs  
Randy & Hannah Riggs  
Dan & Rebecca Sue Riley  
Helen Rinker  
Tim & Susan Ritchotte  
Linda Rooda  
Ross Lawns & Landscaping  
Jeff & Susan Rucker  
Joyce Russell  
Stephen & Nora Rust  
Sandra Sahlberg  
Darrell & Carol Sanders  
Norman Sanders  
Cheri L. Sawicki-Miller  
Robert & Teresa Schickel  
Viola J. Schuler  
Beth Schulte  
Kay Schwinn  
Mike, Lisa, & Alex Schwinn  
Dorothy Seibel  
Joanna & Jim Sell

Larry Sells  
Robert & Elizabeth Shauver  
Earl Shaw  
Bryan Shell  
Kenneth & Janet Shepherd  
Dean & Catherine Shinabarger  
Dorothy Shopp  
Shore & Company, P.C.  
Pamela Shortridge  
Eric & Robert Simmons  
John & Phyllis Slavens  
Benjamin & Shelley Smaltz  
Clifford & Irene Smith  
Janet Smith  
Jennifer & Neal Smith  
Nancy J. Smith  
Jeffrey & Heather Smulyan  
Soros Literary Club  
Mark Stamper  
Mary Stamper  
Alan & Donna Stanley  
David & Fern Stanley  
R. Lynn & Helen Stanley  
State Farm Insurance Agency  
Jeffrey & Karen States  
Christopher Staub  
Rodney Stearns  
Ron & Amanda Stevens  
Brenda Stewart  
Janis & Larry Stewart  
Betty Stickler  
Michael & Amy C. Stonecipher  
James C. & Connie Stout  
E. James & Phyllis R. Strates  
John & Lois Strouse  
James & Marla Suding  
Jon & Sondra Sullivan  
Eugene & Brenda Summers  
Sunny Homemakers  
James & Linda Sweigart  
Tague Golf Outing  
Carole & JD Taylor  
Maribeth Taylor  
Mark & Michele Taylor  
Randy & Jeanette Teltoe  
Lee & Carla Terryberry  
Jerry & Daleen Thomas

Gregory & Brenda Thompson  
Ralph & Clarice Thompson  
Priscilla Thurston  
Steven & Shawn Thurston  
Tim Long Electric, LLC  
Town of Greensboro  
Town of Knightstown  
Town of Lewisville  
Town of Spiceland  
Town of Springport  
Thomas J. Toy  
Joel Tragesser  
Paul & Sherry Trainor  
Dwight & Lerenda Travis  
Chad Trennepohl  
Jeff & Karen Trennepohl  
Jeremy & Elizabeth Trennepohl  
Peyton Trennepohl  
Linda M. Triarsi  
Karen Trissler  
Timothy & Linda Tritt  
William & Vanessa Tucker  
Lynn A. & Jan Turner  
Chance Ujazdowski  
LuAnne Ujazdowski  
Ina & James Van Duyn  
Carol & David Van Hoose  
David Van Hoy  
Sandra Van Hoy  
Mary Alice Vandergrift  
Mark & Terry Vannatta  
Kathryn Waits  
Mark & Debra Walker  
Annis E. Wallace  
Paul & Judith Walter  
Paula L. Walter  
Dan & Debi Ware  
Scott & Norma Warnes  
Danny & Janet Watson  
Jacob & Devin Wattenbarger  
Waukaru Farms  
Helen Weaver  
Tim Weaver  
David & Jean Weimer  
Keith & Sherrell Welcker  
Richard & Sharrel Wells  
Jim & Patty Wenning

Western Turbine  
Robert W. & Maryann Wheeler  
Ronald & Carole Wheeler  
Louis White  
Nick & Mica White  
Robert & Barbara White  
Robert & Carol Whitlock  
Dave Wilcox  
Brian D. Williams  
Kim & Kristi Williamson  
Charles & Emma Willis  
Ralph & Ruth Ann Willis  
Todd & Mary Willis  
Darrell & Carol Wilson  
Amy Wisehart  
Dennis & Marilyn Witt  
Cory & Keri Wolfe  
Megan Woods  
Kathy Woodward  
Robert & Anita Workman  
Spencer Worthington  
Steven & Loretta Wray  
Tony & Cheryl Wright  
Dana Wright  
Jeffery Wrigley  
Greg & Terri York  
Yorktown Elementary School  
Joey & Sheena Young  
Tony & Jodi Young  
Monty & Melody Zapf

## Christmas Donations

*In the true spirit of the holiday season, a holiday greeting card from the Henry County Community Foundation is a meaningful and thoughtful gift idea for a family member, friend, neighbor, valued client or co-worker.*

## Honorariums

Dave & Mary Abbott  
Steve & Tanya Alford & family  
Sam & Sharon Alford  
Max & Carla Angle & family  
Jeff Armstrong  
Dr. Richard Armstrong  
Joni Baker  
Amy Bell  
Chad & Devon Bell & family  
Jeremy Bell  
Joe Bergacs  
Mike & Sherri Bergum  
Jack & Karen Bimber  
David & Susan Booth  
Douglas Bravard  
Judy Bravard  
Christianne Brock  
Chris Broome  
Mike Broome  
Art Brown  
Jodie Brown  
Phillip & Chris Brown & family  
David Broyles & Nicole Broyles  
Mike & Patty Broyles  
Robin & Noah Broyles  
Jay Bumbalough family  
Herb Bunch

Tiffany Byers  
Tammy Champion  
Mr. & Mrs. Steve Chappell  
Bob & Donna Clark  
Nancy Conway  
Greg Crider  
Jane & Kelly Cronk  
Martha Culy  
Danny Danielson & family  
Rob Davis family  
Drs. Mark & Becky Davisson  
Jim & Terri Day  
Roger Dickinson  
Darron & Teresa Dulin  
Shelley Eddings  
Morris Edwards  
Dick & Cheri Estelle  
Josh Estelle  
Susan Falck-Neal  
Belva Fleming & family  
Jennifer Fox  
Scott Frost  
Bob & Susie Galyen  
Geneva Galyen  
Jeff Galyen  
Michael & Ashton Galyen  
Mandy Gossage  
Marsha Gratner  
Kenon Gray  
Dennis & Cathy Hamilton  
Duke Hamm  
Hershel & Tammy Hankenhoff & family  
Bruce & Connie Harvey  
Paul & Freida Hasek  
Mr. & Mrs. Gene Hastings & family  
Jeremy Havens  
Mary Jane Hayes  
Steve Helton  
Henry County EDC Office  
Rosemary & Missy Hilbert  
Pat Hinshaw  
Donna Hoffa & family  
Jackie Howard & family  
Julia Howard

Mr. & Mrs. Wayne Hurst  
Jack & Doris Ingerman & family  
Jowanna Jester  
Dave & Paulette Jones  
Soni Jones  
Gay Keith  
Vicki Kelsey  
Allen King  
John & Patti Lansinger  
Lewis Larrison  
John & Marty Lee  
Susan Lightfoot  
Jody Lorton  
Magna Machine & Tool  
Michael Mahoney  
Ada Marcum & family  
Beverly Matthews  
Tom & Lisa Mathews  
Bill & Sherry McClure & family  
Judy McClure & family  
Kel & Susie McClure & family  
David McCord  
Dennis & Terri McKinsey  
Mike & Amy McKown & family  
Val & Phyllis McNelis  
Nick & Stephanie Metheny  
Shirley Miller  
Tony & Sue Morreale  
Jim & Judy Myers  
Mr. & Mrs. Richard Myers  
Tim & Sarah Myers & family  
Todd & Colleen Myers & family  
Girish & Jennifer Nair  
Kevin Neal  
Tim & Cheryl Paul  
Rex & Bonnie Peckinpaugh  
Lynn & Cindy Perdue  
Steve Pfenninger  
John Pidgeon  
Scott Pinkerton  
Doug & Nan Polk  
Carly Poor  
Terri Pope  
Jeff Ray  
Jim Ray  
Patsy Sanders

Frank Schwegman  
Marion E. Shore & family  
Rex Slick  
Jeff & Kathy Smiley  
Jim & Teresa Southerland  
Ruth Stamper  
Maribeth Taylor  
Mark Taylor  
Jayanna Thompson  
Debbie Thornhill  
Paul & Sherry Trainor  
Karen Trissler  
Bill Tucker family  
Tom & Marty Tuterow & family  
David Tyner  
Jerry Walden  
Chris Walker  
Debi Ware  
Jeff & Dee Watterson & family  
Eugene Weaver & family  
Steve Weidert  
Don & Mary White  
Chris Williams  
Andy & Wendee Woods  
Shannon & Nathan Wright  
Greg & Terri York

## Memorials

Joseph Russell Bimber  
Martha Blackburn  
Ida Bravard  
Patty Danielson  
Kate and Carly Estelle  
Archie and Hilda Frost  
Jack Keith  
Marge Larrison  
Scott Larrison  
Billy R. Smith  
O.B. Smith  
Joseph White  
Olivia and Elijah Wright

*Continued on next page*

# Memorial Gifts

Many have found that a fitting way to remember a special someone is through a gift in memory or in honor of that person. During times of great sorrow and times of great joy we look for ways to honor those who are dear to us. A gift in memory of or in honor of a loved one contributes to a bright future while remembering our past.

Eddie Ames  
David Antic III  
Virgil "Pete" Armstrong  
Tyler Atkinson  
Baby Kate  
Bill Baker  
Clifford Baker  
Elsie Baker  
Millard "Junior" Beavers  
Jean Gordiner Becker  
Mary Magdelene Bertram  
Jerome Bettag  
Delores Billings  
Joseph Russell Bimber  
Ole Bohn  
Emily Brown  
Harold T. Brown  
Mary Brumback  
Paul Brummett  
Bob Bunton  
Barbara Burris  
John Burris  
Fred Calland  
George M. Callaway  
Loretta Carlton  
Harold Catey  
Phyllis Catron  
Howard & Lucille Catt  
Janet Caudill  
Anne Chambers  
Jerry Lynn Chapman  
Thelma Chew

Derek Clark  
Martha Clawson  
Dr. Adelaide Cole  
Carol Cooper  
Dick Culy  
Patty Danielson  
Jerry Day  
Mildred Donovan  
Jane Dragoo  
Joanne DuBois  
Barbara Dynes  
Bruce Edwards  
Melva Emerson  
Kate & Carly Estelle  
Donna Evans  
Wallace Fairchild  
Charlene Hastings Feeny  
Archie & Hilda Frost  
Gayle Fuller  
Carolyn Ballenger Garvin  
Greg Geozeff  
Malinda Glidden  
Ed Gouckenour  
Geneva Grass  
Brian Gray  
Marvin Gregory  
Flonnie Guffey  
Ralph Guffey  
Marjorie Gundlach  
Ron Hale  
Don Hall  
Louise Herder  
Bette Hileman  
Robert Hinsey  
Cecil Hinton  
Roger Hooban  
Richard Hoover  
Janet Jackson  
Max James  
Clifford Jansen  
Robert Jones  
Charles Kalles  
Jack Keith  
Rex M. Kendall  
Bill Kirby  
Clyde G. Kirkpatrick

Phil Kissane  
Scott Larrison  
James & Kathleen Leakey  
Diana Mae Lee  
Gene Leitch  
Mike Maddy  
Karen Maher  
Hilda Malone  
Curtis Marcum  
Janet Martin  
Sharla Massengale  
Carl & Katie McClure  
Roy McGaha  
Robert H. McLane  
Aaron Miller  
John Modesitt  
Marti Morec  
Kay Morgan  
Joe & Jean Morris  
Gabriel Kenneth Mosley  
Gene Moyer  
James Moyer  
Georgia Violet Nead  
Richard Nebling  
George Neel Jr.  
NCHS Class of 1954 Deceased  
Class Members  
Mildred Nottingham  
James Overmyer  
Curtis Parker

Charles Parrish  
I. Emogene "Jean" Pate  
Harold Pearl  
Cody Phillip Peck  
Harry Penrose  
Dorothy Pfenninger  
Paul Pfenninger  
Joan Utt Phipps  
Mary Pidgeon  
Robert Piros  
Michael F. Ploch  
Lewis Poindexter  
George Poole  
Margaret Poole  
Robert Preble  
George & Sharon Rauch  
Pam Rausch  
Joy Robbins  
Lyle Roberts  
Jack Rousch  
Wil Ruback  
Juanita Jane Rucker  
Betty Jo Sanders  
Eva Sells  
Wilburne Stamper  
William Steiner  
Jason & Stacy Sweigart  
Pat Garvie Tannahill  
Jeannie Denney Taylor  
Beverly & Darrell Thurston

Judy Trennepohl  
Frank Trissler  
Judy VanMatre  
Michael Walker  
Mary Ware  
Debby Weidert  
N. Clifton Weisheit  
Azalia (Neel) West  
F. Scott Wheeler  
Joseph White  
Phil White  
Bob Whitlock  
Dr. Guido Wilhelm  
Benjamin F. & Myra E.  
Williams  
Josh Williams  
Roger Williams  
Kenny Williamson  
Patsy Woolums  
Olivia & Elijah Wright  
Debra York  
Jeff Younce  
Ronnie Jo Young

## Pets



Bailey, beloved dog  
Babs Morris, beloved cat  
Rainny Rich, beloved dog



A wedding, retirement, anniversary, birthday, a special memory of an event or group who touched your life, or other special occasions are times when people can be honored with a gift to the Foundation.

Sam & Sharan Alford  
Hannah Catherine Atchison  
Bob & Linda Banta  
Brian Becker  
Pat Bogue  
Douglas Bravard  
Judy Bravard  
Chris Broome  
Mike Broome  
Andy Brown  
David Brown  
Kevin Brown  
Patricia Brown  
Family of Alan Broyles  
Mike Broyles  
Elgan "Sonny" Carter  
Gary Carter  
Nicole Caszlo  
Mary Jo Clark  
Vickie Clark  
Marsha Conway  
Gary Cunningham  
Roberta Cunningham  
Tom Current  
Paul Davis  
Kelli Dudley  
Dr. Daniel Eichhorn  
Phil & Barbara Estridge  
Noah Ted Fitzgerald  
Shirley Fitzgerald  
Bob Foster  
Scott Frost  
Persephone Alexandra Gatch  
Amy Gillan  
Eva Griffey  
Lenville Gross  
Beverly Guffey  
Jack Hannum  
Freida Hasek  
John Henderson  
Dr. Michael Henry

Phil Hinsey  
Robert Hinsey  
Gerald Hodson  
Wanda Jones  
David Keesling  
Nadine Kirkpatrick  
Molly Kohler  
Richard Leitch  
John Lewis  
Beverly Matthews  
David McCord  
Gary McCutchen  
Ron & Alice Moore  
Mark & Chris Morris  
Virginia Morris  
Jim Moyer  
Karen Ohlsson  
Michael Peyton  
Lisa Pfenninger  
Mary Phillips  
John Pidgeon  
Betty Piercy  
Dale Riggs  
Carolyn Shupert  
Debbie Sickles  
Dr. James Sumners  
Ralph Thompson  
Priscilla Thurston  
Joy Tinsley  
Betty Walker  
Eugene Weaver  
Joe White  
Charles & Emma Willis  
Robert Wisehart

## A Great Transfer of Wealth Is Taking Place

The net worth of Henry County is estimated to be \$2.25 billion. Over the next 10 years, \$1.5 billion is expected to be transferred from one generation to the next. If every estate gave just 5% to the community for future generations, the Henry County Community Foundation could grant an additional \$1.18 million each year, forever.

What would you like to accomplish with your money that would be meaningful to you?

Any donation can be made to one of the more than 400 funds that already exist:

- Doing good things for children
- Education, churches, healthy communities, feeding the hungry, preserving landmarks or nature, etc.
- Support for the arts and animals
- Keeping effective cancer treatment in our community
- Unrestricted fund supports the changing needs of the community

ALL DONATIONS ARE TAX DEDUCTIBLE

### Making Plans Now, For the Future

Create your plan now, while postponing the transfer of assets to HCCF until after your lifetime.

Bequest or beneficiary designation – name HCCF in your will or trust or as a beneficiary on life insurance or retirement account.

You can change these plans until your death.

Adding a gift for charity to your will or retirement plan is simple

With an endowed charitable fund, your impact on the community will never end.

In your will, tell us how you wish the money in your fund to be used. Endowments create a permanent legacy in your name.

Visit us at [www.henrycountycf.org](http://www.henrycountycf.org) or contact us at 765-529-2235 or email [Beverly@henrycountycf.org](mailto:Beverly@henrycountycf.org).

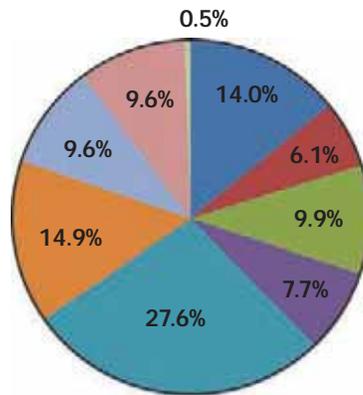
# Financial Report

Statement of assets, liabilities, and fund balances  
Accrual Basis - For the years ending December 31, 2014 and 2013

Unaudited

	2014	2013
<b>Assets</b>		
Cash .....	\$ 243,002	\$ 451,219
Pledges Receivable .....	635,574	635,984
	<u>878,576</u>	<u>1,087,203</u>
Property and Equipment:		
Land .....	202,514	202,514
Building .....	658,069	638,049
Furniture and Equipment .....	155,970	132,205
	<u>1,016,553</u>	<u>972,769</u>
Accumulated depreciation .....	(330,286)	(306,695)
	<u>686,267</u>	<u>666,075</u>
Investments .....	<u>32,854,915</u>	<u>32,110,118</u>
	<u>\$ 34,419,759</u>	<u>\$ 33,863,395</u>
<b>Liabilities</b>		
Accounts payable .....	28,180	29,581
Accrued grants .....	334,657	382,855
Lilly Gift VI deferred liability .....	242,085	—
Annuity payment liability .....	946,827	1,056,754
	<u>1,551,749</u>	<u>1,469,190</u>
Fund Balances .....	<u>32,868,011</u>	<u>32,394,205</u>
	<u>\$ 34,419,759</u>	<u>\$ 33,863,395</u>

## Schedule of Assets and Style Allocation



- Large / Mid Cap Equity
- Small Cap Equity
- Hedged Equity
- Private Equity
- International Equity
- Fixed Income
- Real Assets
- Diversifying Strategies
- Cash / Other

Independent Auditors' Report and Notes to Financial Statements available upon request.

# Board of Directors



**Susan Falck-Neal**  
Chair  
Broker  
ERA Integrity  
Real Estate



**Dr. Richard Armstrong**  
First Vice Chair  
Dentist



**Duke Hamm**  
Second Vice Chair & Secretary  
Business Advisor  
Hamm  
Focal Point Business  
Coaching



**Debi J. Ware**  
Treasurer  
Assistant Vice  
President  
Star Financial  
Bank



**Mike Broyles**  
Retired



**Steve Cissna**  
Agency Manager  
Indiana Farm  
Bureau Insurance



**Jeffrey D. Galyen**  
Attorney  
Galyen & Row  
Law Office, LLP



**Cathy Hamilton**  
Consultant  
Cathy Hamilton  
and Associates



**Soni Jones**  
Student Services  
Coordinator  
New Castle  
Career Center



**Steve Pfenninger**  
President  
Pfenninger, Claxton,  
and Estelle Insurance  
Group



**James Ray**  
Retired



**Frank Schwegman**  
Retired



**Jeff Smiley**  
President  
Smiley Body  
Shop, Inc.



**Mark Taylor**  
Commercial  
Lender  
Citizens  
State Bank



**Steven Weidert**  
Financial Advisor  
Edward Jones

**Emeritus Directors**

Emeritus Directors are chosen in recognition of their previous efforts as board members, officers and volunteers who have had a significant impact on the success of the Henry County Community Foundation.

Herb Bunch  
Danny Danielson  
Judy Melton\*  
Rex Slick

Patty Danielson\*  
Morris Edwards  
Dick Myers

*\*deceased*

# Staff



**Beverly Matthews**  
President  
beverly@henrycountycf.org



**Jennifer Fox**  
Development & Marketing Director  
jennifer@henrycountycf.org



**Jayanna Thompson**  
Program Director  
jayanna@henrycountycf.org



**Carly Poor**  
Executive Assistant & Gift Manager  
carly@henrycountycf.org



**Lynda Jackson**  
Accountant

All fifteen members of the board of directors are duly elected and responsible for endowment development, grant allocations, supervision of special projects and for the general operation of the Foundation. Directors are eligible to serve two successive three-year terms.

## Standing Committees

### FACILITIES

Jeff Smiley, Chair

### FINANCE/INVESTMENT

Bud Shore, Chair

Bill Aitchison

Mike Broyles

Morris Edwards

Danny Danielson

John Pidgeon

Rex Slick

Steve Weidert

### GENERAL SCHOLARSHIP

Betts Adams, Chair

Herb Bunch

Bob Crowe

Pam Davidson

Roger Dickinson

Susan Falck-Neal

Barb Haase

Susie Leonard

Joe Manis

Mike McKown

Ray Pavy

### YOUTH GRANTS

Bill Bergmann, Chair

Greg Crider

Susan Falck-Neal

Ann McGlothlin

### GRANTS

Debi Ware, Chair

Dr. Richard Armstrong

Danny Bowman

Bill Bergmann

Mike Burch

Marsha Conway

Susan Denison

Marsha Gratner

Scott Lightfoot

David McCord

Lisa Pfenninger

Juanita Sheward

Todd Thalls

Penny York

### DEVELOPMENT

Lori Atkinson

Herb Bunch

Duane Brammer

Cindy Brown

Kevin Brown

Mike Broyles

Mike Burch

Brianna Chapman

John Cleveland

Lana Enlow

Josh Estelle

Jeff Galyen

Duke Hamm

Ruth Hayworth

Mike McKown

Rex Slick

Maribeth Taylor

### WOMEN'S GRANTS

Christi Brock

Sylvia Edwards

Julie Lacy

Shirley Miller

Ashley White

### EX-OFFICIO

(all committees)

Beverly Matthews,

HCCF President

Susan Falck-Neal,

Board Chair

### LEGAL COUNSEL

R. Scott Hayes

### AUDITOR

Estep Burkey Simmons, LLC

## Ways to Contribute

Many have found that a fitting way to remember a special someone is through a gift in memory or in honor of that person. During times of great sorrow and times of great joy we look for ways to honor those who are dear to us. The Unrestricted Fund for Community Grants provides an opportunity to preserve their memories while supporting the community that we all love so dearly. A gift in memory of or in honor of a loved one contributes to a bright future while remembering our past.

**Cash** You may add to an existing philanthropic fund or create a new philanthropic fund.

**Stocks and Bonds** You receive a charitable tax deduction of the current value. If the securities have appreciated in value since purchased, you pay no capital gains tax.

**Life Insurance** You assign the policy and beneficiary right to the Henry County Community Foundation, Inc. It can be a fitting memorial for a spouse who has preceded you in death. The match and charitable tax deduction will be the lesser of the cost or cash value of the policy. If the donor continues to pay annual premiums, these too are tax deductible. The future benefit to the Foundation will be equal to the face value of the policy.

**Charitable Remainder Trust** If you are the beneficiary of a trust which pays you a regular income, you may assign a portion of the income to the Henry County Community Foundation. You pay no further tax on the income and may take an income tax deduction for the value of the assignment. You establish a trust of some of your assets. You receive a charitable tax deduction for the remainder value as determined by IRS regulations, and estate taxes will be reduced upon your death. You and your designated family will receive an income for life. The remainder goes to the Henry County Community Foundation upon the death of the beneficiary.

**Will** You may add a codicil to your will, naming the Henry County Community Foundation and describing your gift. The value of the bequest will not be subject to estate taxes. Your gift will continue your vital involvement in the future lives of residents of Henry County.

**Charitable Lead Trust** You may give your assets to the Henry County Community Foundation for a designated period. The income is available for grants. After this period, the property in trust can be returned to you or your estate. You pay no income or capital gains taxes during the period of control by the Foundation of these assets.

Charitable gift annuities  
Retirement plan assets

Transfer of private foundation  
Group memorial funding

Corporate giving  
Retained life estate

There are many other tools available for making outright and planned gifts. For more information or to discuss the options that best fit your situation, contact the Foundation office.

## Build a Fund for a Cause You Care About through Automatic Deposit

Simplify your donations to the Henry County Community Foundation by having funds automatically withdrawn from your bank account on a regular basis. Withdrawals occur monthly and there are no minimums and no maximums. You can stop donations at any time by notifying us in writing.

Every donation, even \$10 a month, is valuable and crucial to progressing our mission of improving the quality of life in Henry County!

Contact the Foundation staff at 765-529-2235 for more information.

## Foundation Offers Tools for Growth

### Website

Check out our website for donor stories, grantee stories and volunteer stories as well as information on grants and scholarships. The website also has on-line donation capabilities from the convenience of your own home: [www.henrycountycf.org](http://www.henrycountycf.org).

### E-newsletter

*The Foundation Pulse* is our monthly newsletter that gives you important dates to remember, events to attend and news and information. To sign up for the E-newsletter visit our website at [www.henrycountycf.org](http://www.henrycountycf.org).

### Social Media

Stay up to date with the Foundation and all that is going on through Facebook, LinkedIn and Twitter: @henry\_county\_cf.

### Gift Calculator

Ever wonder if you gave a gift where it would be by the time you retire or your children graduate from college? Check out the gift calculator in the donor section of our website.

# Mission Statement

The Henry County  
Community Foundation, Inc.  
is a public trust which secures permanent  
funds for philanthropic purposes.

## Its Mission

...is to help where the needs  
are greatest and the benefits to the  
community and its citizens are most  
substantial, and

...to provide public-spirited donors  
a vehicle for using their gifts in the  
best possible way now and in the  
future as conditions inevitably  
change, and

...to provide excellent stewardship  
of those gifts which it receives.

