For You.
For Marion.
Forever.

Specially Prepared for You
Marion Community Foundation helps generous people like you achieve long-term philanthropic objectives by creating tax-deductible, named endowment funds.

These funds support numerous Marion area nonprofit programs and organizations and individuals through grants and scholarships.

Because of our prudent investment policy and the endowed nature of these funds, grants and scholarships, in your name, will continue forever.

Maybe you’ve never put yourself in the category of Rockefeller, Carnegie, Buffett, or Gates, but your desire to be philanthropic is no less than theirs.

These great philanthropists all used the power of endowments to make the impact of their gifts last forever.

You can, too.

Marion Community Foundation makes it easy.
“We started our fund as part of our estate planning process. We noticed the wonderful work being done by others’ gifts and enjoy being able to impact local entities in which we have an interest. We liked that money we donated through Marion Community Foundation would be managed locally and, over time, the grants to be made from our fund could grow to become even more significant.”

What is a Community Foundation?

“We wanted to give back to the community where we both have lived since childhood.

We are impressed with the impact Marion Community Foundation has and will continue to make.”

Rex & Carolyn Parrott
Parrott Family Fund • est. 2011
What is a Community Foundation?

“We Want What You Want.”

| You want your gift to be a permanent legacy. | We build endowment funds to benefit the community forever and help create personal legacies. |
| You want to be a part of a community effort. | We are a collaborative community leader, coordinating resources to create positive change. |
| You want to keep your charitable dollars close to home. | We are a local organization with deep roots in the Marion community. |
| You want others on your side. | We have broad expertise on local community issues and needs. |
| You want to be an integral part of your charitable giving. | We provide highly personalized service tailored to your charitable and financial interests. |
| You want someone who will listen to your plans. | Our funds help you support the causes you care most about. |
| You want flexibility. | We accept a wide variety of assets and can facilitate even the most complex forms of giving. |
| You want experience...and expertise. | We partner with professional advisors to create highly effective approaches to charitable giving. |
| You want to get the most out of your gift. | We offer maximum tax advantages for most gifts under state and federal law. |
| You understand the advantages of leveraging your gift. | We multiply the impact of gift dollars by pooling them with other gifts and grants. |
| You want to be remembered for helping your community. | We offer options of naming a fund after you, your family, or someone special, which will be honored forever. |

“You can do what I cannot do. I can do what you cannot do. Together, we can do great things.”

– Mother Theresa
What is a Community Foundation?

A Community Foundation is...

**Personalized Service.**
We can help you achieve your personal, charitable, and financial goals. We are happy to meet with you, your family, and your professional advisors to answer your questions and help you establish a fund in your name or in the name of a loved one. Depending on your choice, the fund may be used to meet ever-changing needs, address a cause you care about, or support a specific charity.

**Local Expertise.**
Our professional staff and Board of Directors continually monitor all areas of community need, including human services, education, parks and environment, health and wellness, community development, history, culture, faith-based, animal care and the arts. We also understand the capabilities of local nonprofits addressing these needs. When you give through a community foundation, you know your gift will be put to good use.

**Community Leadership.**
We are leaders helping to make our community better and bringing diverse voices and groups together to address local issues. We foster greater giving and volunteering in our community. And, we plan for the future by building endowments to ensure grants support the communities of Marion County forever.
“Given all the change I’ve seen in my lifetime, I know things will continue to change in Marion.

We want our funds to change with the community and always do good for Marion.”

Bob & Dottie Wopat
Robert M. & Dorothy C. Wopat Community Fund
Robert M. & Dorothy C. Wopat Scholarship Fund
Wopat Family YMCA Fund  ■ est. 2008

The Wopats, who had no heirs or next of kin, left their $17 million estate to Marion Community Foundation.

This once-in-a-lifetime gift doubled the size of Marion Community Foundation and supports hundreds of students and organizations in the Marion area.
All About *Marion* Community Foundation

Quick Facts About Us

- Serving the Marion community since 1998
- More than 390 named funds addressing quality of life issues in Marion – *arts & culture, education, community development, health & wellness, the environment, churches, nonprofits, and human services*
- Putting $63 million in assets to work for Marion’s benefit
- Awarding $2 million in scholarships and grants annually to support local students and nonprofit charities throughout Marion
- 15-member Board of Directors to keep in touch with community issues and needs
- The leading resource for local residents wishing to financially support local charitable organizations, causes, and programs
- A 501(c)(3) tax-exempt, nonprofit, autonomous philanthropic institution supported by the greater Marion community
- Building permanent endowment funds, created by donations from individuals and organizations like you, to carry out their charitable interests
- Supporting effective nonprofit organizations, programs, and causes in the Marion area
- Supporting local students pursuing higher education with community-based scholarships
- Serving in leadership and resource roles to identify important community issues and support community improvement
All About Marion Community Foundation

Marion Community Foundation makes planned giving all you want it to be.

It’s For You.
Giving to Marion Community Foundation is an easy way to support your favorite charities or charitable interests through one organization. Community foundations fulfill your charitable giving goals by helping you create a fund or scholarship that carries your name, with benefits you direct. From planning through implementation and administration, community foundations guide you through the process and do all the work for you.

It’s For Marion.
Marion Community Foundation has deep roots in the community and understands the unique needs of local residents and their challenges. The Foundation is distinctly qualified to match donors’ philanthropic desires to a broad range of community needs. Marion Community Foundation makes the communities of Marion County a better place to live.

It’s Forever.
The name you designate for your fund or scholarship will go down in history. All funds created with Marion Community Foundation are permanently invested. Only a percentage of the funds’ growth is awarded, which creates a permanent legacy.

Learn More
In the Appendix of this Profile Book, you can:
- read our mission and vision statements
- meet our professional staff and Board of Directors
- delve into the history of how Marion Community Foundation came to be
- see our latest financial statements and investment returns

Marion Community Foundation is proud to have met the rigorous benchmarks of National Standards since 2008.
When you think of community supporters in Marion, the name Gary Sims is probably on many people’s short list. So, it’s no surprise that, in 2006, he and his family created a scholarship fund at Marion Community Foundation. The Sims Family Scholarship makes awards to support seniors and graduates of Pleasant High School, of which Gary, his wife, and all his children are alumni. Gary, a well-known community leader and businessman with Sims Brothers Recycling, created this scholarship fund to give local students the opportunity to achieve their educational potential.

“I am a firm believer in the power of education to positively change lives.”

— Gary Sims

Gary Sims and family

Gary & Diana Sims Family Scholarship Fund  est. 2006
The Incredible Impact on Marion

Who We’ve Supported

American Red Cross
Black Heritage Council
Boys & Girls Club
Center Street Community
Health Center
Chapel Hill House
Crawford Marion ADAMH
Epworth Preschool & Daycare
Eye-to-Eye Low Vision
Marion County
Family Court
Habitat for Humanity
Warren G. Harding Presidential Site
Marion Mentors
Leadership Marion
League of Women Voters
Leapin’ Outreach
Let’s Read 20
LOVE Inc.
MARCA Industries
Marion Adolescent Pregnancy Program
Marion Area Chamber of Commerce
Marion Area Counseling Center
Marion Area Humane Society
Marion City Schools
Marion Concert Band
Marion County 4-H
Marion County Children Services
Marion County Historical Society
Marion County Special Olympics
Marion Crawford Prevention Programs
Marion Family YMCA
Marion Police Department

The difference is more than numbers.

But, the numbers are pretty impressive.

- **302** scholarships awarded*
- **$482,914** in scholarship awards*
- **209** scholarship recipients*
- **132** scholarship funds
- **112** grants awarded*
- **$1.7 million** in grant awards*
- **99** local charities & nonprofits helped*
- **250+** grant-awarding funds
- **23** years of supporting Marion
- **390** charitable funds
- **$17.8 million** in cumulative grants and scholarships awarded locally
- **13** years of National Standards accreditation
- **$63 million** is assets

You care about Marion.

With more than 390 funds addressing community needs, our donors, staff, Board of Directors, grant and scholarship committees – basically everyone associated with Marion Community Foundation – is looking to improve the quality of life in Marion, Ohio. Our funds support numerous Marion area students, nonprofit organizations and programs in the arts, education, health care, the environment, community development, and human services. The organizations listed in this section are representative of the scope and breadth of our grant and scholarship programs.
The Incredible Impact on Marion

Arts & Culture
Since 1928, the Marion Palace Theatre has been home to the arts in Marion. People who know and love the Palace have created several funds at Marion Community Foundation to ensure that the footlights always shine. Likewise, we have funds that support the Marion Concert Band, the Mid Ohio Fine Art Society, and local history via the Marion County Historical Society, the Linn School, the Harding Presidential Site, and more.

Health & Wellness
Marion Community Foundation has strong roots in the field of health care and a long-standing tradition of awarding grants in support of health and wellness within the community. Examples of some of our recipients include: the Marion Family YMCA, Center Street Community Health Center, and Prairie Parks’ Tallgrass Trail. We have a number of funds dedicated to helping people with specific health concerns, such as ALS, low vision, arthritis, Parkinson’s Disease, and other disabilities, as well as age-related issues like transportation.

Food, Shelter & Support
Turning Point, Habitat for Humanity, the Red Cross, our local homeless shelters and food pantries, and more all do great work to help those in need in the Marion area. And, we are glad to support them. Marion Community Foundation’s grants have been awarded to these organizations, and others like them, which provide a hand up to people who are struggling with some of life’s challenges.
The Incredible Impact on Marion

**Education**
Since its inception, Marion Community Foundation has been supporting local students in their educational endeavors. We are the go-to organization for scholarships in the Marion area. In 1999, a mere year into our existence, we awarded our first scholarship – from the Marion Area Auxiliary Scholarship Fund to nursing student Brandi Mooney. The scholarship program has grown exponentially to 130+ funds awarding more than $480,000 annually – providing hundreds of locally-based scholarships. Our program is unique in that we encourage donors to make awards to both graduating seniors and college students throughout their university careers.

**Community Development**
Marion Community Foundation exists to see Marion prosper. A major player in this area of support is the multi-million dollar, unrestricted Robert M. & Dorothy C. Wopat Community Fund, but it is far from the only one. And, this is an area where new funds can make a huge impact. Community development encompasses organizations, programs, and projects that strengthen the base to improve human and community resources. Forward thinking organizations such as Marion Matters, Downtown Marion, Inc., Tri-Rivers’ RAMTEC, Marion Technical College and Ohio State Marion, among others, are supported by funds at Marion Community Foundation. In return, the Foundation supports the MarionMade! community pride initiative to spread good news about Marion’s people, places, products, and programs.

**The Causes You Care About Most**
Some funds at Marion Community Foundation have been created to support very broad categories of need and some are for very personal causes. We have:
- the Mary H. Hollaway Humane Society Fund because Mary loved her dogs,
- the Don & Deb Alspach Fund to support outdoor recreation, especially at the Tallgrass Trail,
- Merle Hamilton’s funds which support the historical preservation of Marion County, which he so dearly treasured; as well as,
- endowment funds for many local churches and nonprofits.

Creating a fund at Marion Community Foundation is one of the easiest things you can do to leave your legacy. In just a little time, with just a little money, you can do so much good and be remembered in Marion, forever.
Known for his kindness, gentleness, compassion, and tremendous sense of humor, Merle will be remembered forever as an ardent supporter of his hometown, Marion, Ohio.

A. Merle Hamilton
A. Merle Hamilton Central Christian Church Fund
A. Merle Hamilton Epworth United Methodist Church Fund
A. Merle Hamilton Centenary United Methodist Church Fund
A. Merle Hamilton Fund and A. Merle Hamilton
Marion County Historical Society Fund  ■ est. 2010
Give to the Future of the Greater Marion Area
You've lived here. You've worked here. You are part of this community’s past and present. By creating an endowment fund with Marion Community Foundation, you can invest in our community’s future.

**How It Works:**

A charitable person like you donates money or other assets to Marion Community Foundation.

A permanent fund, in a name you choose, is created.

The assets are prudently invested according to a well-established investment policy.

A percentage of the fund’s average value over the previous three years is awarded each year in the name you chose, either as a grant or a scholarship.

The grants or scholarships are devoted to your interest areas to meet community needs.

The main portion of your original donation remains invested; your gift is a permanent source of doing good, forever.
The Beauty of Endowment Giving

Endowment giving is a major, planned charitable gift that comes from the donor’s financial or estate planning. It is often used to honor or memorialize an individual or recognize a family. Gifts could come from appreciated securities or stock, real estate, a retirement plan, or even cash—but they are generally made from outside of one’s discretionary income. Some donors are in a position to make the gift (or multiple gifts) during their lifetime, but many make the gift as a beneficiary designation in their estate. Planned gifts can offer many benefits to the donor, including tax benefits or the potential for returned income.

Marion Community Foundation offers many ways to support the causes you care most about. No matter the amount of the gift you make, we have a giving option available to best support your passion. You can even use a life insurance policy or IRA to leave a greater gift than you ever thought possible.

Anyone Can Add to an Existing Fund

Anyone can add to an existing fund at any time, in any amount—even if you did not start the fund. Donating to an existing fund is easy, and there are options for everyone:

- **Cash:** Donate any amount online or mail a check with the fund name on the memo line. We also accept wire transfers and ACH payments.

- **Credit Cards:** We accept all major credit cards with secure online processing on our website - www.MarionCommunityFoundation.org

- **Real Estate and Marketable Securities:** Transfer securities to Marion Community Foundation - after liquidation, we will deposit the assets into the fund of your choice.

- **Insurance Policies & IRAs:** Simply designate Marion Community Foundation as the beneficiary and specify the name of the fund; and, there are tax benefits to donating your IRA’s Required Minimum Distribution to charity.

- **Bequest:** Designate Marion Community Foundation as a beneficiary in your will or TOD/POD accounts.

Visit our website at [www.MarionCommunityFoundation.org](http://www.MarionCommunityFoundation.org) and use the Giving Opportunities tab to explore our Funds Directory.
How Endowment Giving Works—Forever

100-21=107

No, this isn’t “new” math. The above “equation” does, however, represent the power of endowment giving and grant-making.

Mary Hollaway, who enjoyed a long career with Fahey Bank, generously created several funds at Marion Community Foundation through her will in 2011. Each was worth $100,000. If we look at one of those funds as an example, that $100,000 became a permanently endowed fund in her name: the Mary H. Hollaway Humane Society Fund.

Our prudently crafted spending policy at Marion Community Foundation allowed this fund, in its first four years, to grant $21,000 to the Marion County Humane Society to support its charitable purposes. Equally well-crafted is our investment policy. By working closely with our local financial advisors and professional investment advisory group, Mary’s fund grew to be worth $107,000 in that same time. So, even though the fund started with $100,000 and gave away $21,000, the fund still had $107,000 in endowed assets.

That’s the beauty of endowment giving. Mary’s endowed fund will continue giving ample annual grants in perpetuity to one of her favorite charities and continue to be prudently invested in order to support those annual grants. Based on sound calculations, we can project that over the next 25 years, Mary’s fund will likely grant $132,000 and still be worth $115,000. That makes our equation look like this: 100-132=115. How’s that for some nifty math? And, that pattern will continue well beyond those 25 years.*

We think Mary, who loved her pets and knew the value of a dollar, would be very pleased to know how her gift is working to improve our community and to know that it will continue for generations to come.

Mary H. Hollaway
Mary H. Hollaway Donor Advised Fund
Mary H. Hollaway Humane Society Fund
Mary H. Hollaway Non Endowed Fund
Mary H. Hollaway Palace Theatre Fund and
Nobel F. Hollaway YMCA Scholarship Fund • est. 2010

*Assumes 5.0% annual payout and 5.5% rate of return
Non-Endowed Fund Options

If you prefer to not create a permanent endowment fund, you can establish a non-endowed scholarship or grant fund. In this type of fund, some or all of the fund’s principal is paid annually for grants or scholarships. You could give a one-time gift, for example, of $10,000 and direct that $1,000 scholarships be awarded annually until the fund is depleted.

Or, you could decide to contribute a specific amount, say, $1,000, each year and direct that $1,000 to be paid in the current year for scholarships or grants. This is what is known as a “pass-through.”

A third choice is to blend an endowed fund with some non-endowed gifts. This might be a good option if you want to start awarding scholarships or grants immediately, but you currently don’t have the ability to contribute an amount to reach the fully endowed level. In this scenario, you could create an endowed fund with an initial gift of $1,000 and the intention of building a permanent endowment. In addition, you contribute another $1,000 as a “pass-through” donation to be awarded in the current year for scholarships or grants. In subsequent years, you decide how much to contribute to your endowed fund to build the principal and add additional pass-through amounts for current-year scholarship or grant awards. Once the principal reaches the required endowment minimum ($5,000 for grant funds and $10,000 for scholarship funds), annual awards will be paid from the endowment in accordance with our spending policy, and you can decide whether to continue making pass-through contributions.
Creating a Charitable Plan for You

“We had long been aware of the existence of Marion Community Foundation when we decided it was our time to give back. We explored our options and were pleased to be able to start our funds with gifts of appreciated stock and, on top of that, leverage Whirlpool’s employee matching gifts program to double our efforts.”

“We hope to help the community and make someone’s life better.”

— Nancie Poorman

Rick & Nancie Poorman
Rick & Nancie Poorman Fund and Poorman Palace Theatre Fund  est. 2015
Creating a Charitable Plan for You

### What do you want to do?

<table>
<thead>
<tr>
<th>Action</th>
<th>Fund Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Give to a specific charitable organization of which you are particularly fond?</td>
<td><strong>Start a...</strong> Designated Fund</td>
</tr>
<tr>
<td>Support a specific cause through a variety of projects and organizations?</td>
<td>Field of Interest Fund</td>
</tr>
<tr>
<td>Be actively involved in your philanthropic decision-making?</td>
<td>Donor Advised Fund</td>
</tr>
<tr>
<td>Give when and where the need is greatest in our community?</td>
<td>Unrestricted Fund</td>
</tr>
<tr>
<td>Invest in future generations by supporting local students’ educational opportunities?</td>
<td>Scholarship Fund</td>
</tr>
<tr>
<td>Support your nonprofit organization’s own programs and operations in perpetuity?</td>
<td>Agency Fund</td>
</tr>
</tbody>
</table>
Consider a **Designated Fund if you:**

- Desire simplicity and ease
- Seek to create a lasting legacy of support for your favorite charity
- Want to avoid administrative hassles of charitable giving
- Want to support a specific organization
- Wish to support your chosen organization or cause in perpetuity

Support the good work of your favorite nonprofit in perpetuity. Perhaps through volunteering, support of annual fund drives, or a personal interest, you've developed a passion for specific nonprofit programs or initiatives.

A Designated Fund is a personalized fund that makes it easy for you to support the organizations you care about. You can use cash, stock, or other assets to create a named fund and qualify for an immediate income tax deduction. We will then regularly distribute grants to the charities you identify when the fund is created.

**Key Benefits**

- Create a legacy of support for your favorite charity
- Avoids administrative hassles of charitable giving — from keeping receipts for tax records to simply sending a check regularly
- Supports a specific “designated” organization regularly and in perpetuity
- Makes regular distributions from Marion Community Foundation to your designated charity

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**James C. Cooper’s St. Mary Church Fund**

With $100, James Cooper created an endowed fund at Marion Community Foundation - then named the Foundation as the beneficiary of his IRA. It was a very simple process to create the **James C. Cooper’s St. Mary Church Fund** to benefit his beloved parish.

When James passed, the IRA distributed $51,000 to Marion Community Foundation. Because of his act of generosity, the fund will provide a gift of roughly $2,000* to St. Mary in James’ name every year – forever.

*Assumes 5.0% annual payout and 5.5% rate of return
Creating a Charitable Plan for You

Consider a Field of Interest Fund if you:

- Are passionate about a specific interest area or charitable cause
- Want to learn more about nonprofits and charities in Marion
- Seek expert opinions on community needs and who is addressing them
- Wish to give to multiple organizations and programs

Create a fund for specific causes that are close to your heart. Field of Interest Funds allow you to focus your charitable giving toward an area of interest, while our expertise determines the most effective organizations completing the best work.

Field of Interest Funds offer you the opportunity to support evolving needs and a variety of nonprofits focused on your area of interest. The type of fund allows donors to work closely with our staff and Grants Committee to identify organizations that are making the greatest impact in the area(s) of your choosing.

Key Benefits

- Supports your specific area of interest
- Learn more about nonprofit organizations in the Marion area offering programs and initiatives in your chosen field of interest
- Expertise in research and community evaluation to determine needs, opportunities, and effectiveness of local nonprofit programs and initiatives

Kathleen E. O’Shea Fund

Kathy O’Shea loved dance and theater. When she took her final bow in 2012, her husband, John, honored her memory with the creation of the Kathleen E. O’Shea Fund through a gift of appreciated stock. Kathy passed at age 69, having fought an 18-year battle with cancer. She loved to dance and perform at the Marion Palace Theatre, as well as direct plays at the couple’s winter home in Florida. Her fund, which received numerous memorial gifts from friends and family, as well as planned gifts from her and John’s estates, makes grants in support of the arts—specifically live theater and dance—that Kathy so dearly loved.

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Consider a **Donor Advised Fund** if you:

- Want to manage all of your giving from one convenient account
- Want to be actively engaged in your philanthropy
- Wish to give to multiple organizations and programs throughout the year
- Are interested in learning more about Marion and its challenges
- Want to involve your children or family in your charitable giving

Giving becomes convenient and personal with a Donor Advised Fund. Donor Advised Funds are the number one option for donors who value flexibility, choice, and a hands-on approach to giving, and are ideal for those wanting to give to multiple organizations and programs. Donor Advised Funds can be set up with as little as $5,000. Due to this fund’s personalized approach, it is one of our most popular fund types at Marion Community Foundation.

A Donor Advised Fund is a personalized fund that makes it easy for you to support the issues and organizations you care about in the Marion area. You can use cash, stock, or other assets to create a named fund, qualify for an immediate income tax deduction, and choose the charities you want to support.

**Key Benefits**

- Provides immediate tax deduction with the option of deferred charitable distribution
- Consolidates your charitable giving, providing administrative convenience
- Offers flexibility to choose multiple grant recipients
- Provides the ability to add to the fund at any time
- Makes giving anonymously an option, if desired
- Creates a family legacy — name your children, grandchildren or other loved ones as successor advisors to the fund
Creating a Charitable Plan for You

Consider an Unrestricted Fund if you:

- Want to support changing needs in the Marion area
- Want the greatest impact for your philanthropic dollar
- Want to see your gift meet the most pressing community needs

Support the community’s greatest opportunities and emerging needs with a responsive contribution. Created by civic-minded individuals like you, Unrestricted Funds have been making grants to the Marion community since our founding in 1998.

Unrestricted Funds are a personalized fund you create to impact our community for generations to come. In creating an Unrestricted Fund, you allow Marion Community Foundation’s Board of Directors to make awards for any unanticipated community needs – as they arise – which the Board deems worthy and appropriate. Our 15-member Board of Directors includes local community leaders who volunteer their time in support of the Marion area and have a vested interest in the success of our community. Our Board members include professionals in business, finance, law, education, and other professions that make them – along with their deep knowledge of the Marion area and local nonprofit capacity – keenly capable of accepting and putting to good use gifts in many forms.

Key Benefits

- Supports the changing needs and opportunities in the Marion area
- Makes the greatest impact possible with your charitable dollars
- Seeks expertise in research and community evaluation to determine needs, opportunities, and effectiveness of local nonprofit programs and initiatives

Chester & Mildred Roberts Fund

Building on a true legacy of civic involvement is the Chester C. & Mildred Roberts Fund. The Roberts were lifelong residents of Marion, as were generations of family before them. Mildred’s family were some of the oldest and closest friends of Marion’s most famous family, the Hardings. Chester was president of the Marion Reserve Power Company, precursor to Ohio Edison. This unrestricted fund was created by their son Charles and his wife, Mary, and is supported by the Roberts family to this day.
Consider a Scholarship Fund if you:

- Want to support educational opportunities
- Want to honor or memorialize a loved one
- Want to invest in future generations

Make the dream of an education come true. Never before have scholarships been more important to the success of university-bound students. Your scholarship will help ensure that this life-changing opportunity reaches deserving, local students.

A Scholarship Fund is a personalized fund you create to help others advance their education. With the assistance of our staff, you determine scholarship guidelines, including eligibility criteria, award amount, and selection committee. Depending on the degree to which you’d like to be involved, you may even choose to be a member of the selection committee.

Key Benefits

- Supports educational opportunities, an educational institution, or course of study
- Engages you in your philanthropy and in creating guidelines and eligibility for award recipients
- Honors or memorializes a loved one
- Creates a legacy of generosity toward educational endeavors
- Invests in the future of our community by offering students the support they need to achieve their educational goals

John T. Gordon Memorial Eagle Scout Scholarship Fund

John “P.T.” and Lois Gordon, established the John T. Gordon Memorial Eagle Scout Scholarship Fund to honor the memory of their son and the fine man he was, well representative of the Eagle Scout rank he held. The fund draws attention to the dangers of distracted driving, an issue the family became passionate about following John's untimely death in a traffic accident. The scholarship supports higher education for Eagle Scouts.
Consider an **Agency Fund** if you:

- Represent a nonprofit organization
- Want to support your programs and operations in perpetuity
- Want to diversify investments
- Want to provide an easy way for donors to support your organization

Help ensure lasting sustainability for a nonprofit of your choice. An Agency Fund can help organizations set aside funds for specific programming, provide security for unforeseen obstacles, prepare for planned growth, or build an investment strategy.

We work closely with you to help establish the fund that achieves your organization’s needs for today and in the future. An Agency Fund protects the capital of an organization, demonstrates long-term financial planning, and can also provide a relatively steady source of income. You can use cash, stock, or other assets to create a named fund.

**Key Benefits**

- For nonprofit organizations with IRS 501(c)(3) status
- Supports the growth and stability of your organization
- Demonstrates security and vision to leverage current funding opportunities for your organization
- Increases investment efficiencies—funds are pooled to receive maximum return and lower fees
- Provides a relatively constant source of annual income
- Provides an organized and accessible opportunity for donors to contribute to your organization
- Builds your endowment through planned gifts and estate planning strategies

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**Don & Betty Jerew’s Emanuel Lutheran Church Fund**

Created in 2005, this fund both honors its namesakes and annually benefits Emanuel Lutheran Church.

**Marion County Children’s Home**

The programs and needs of Waddell Village and Marion County Children Services have benefitted from gifts to the Marion County Children’s Home Endowment Fund since 2005.
“When we are gone and these funds are still going, Kenny’s name will be kept alive and people will remember who he was.

These funds will do things as he would have liked them to be done.”

—Judy Rawlins, co-worker & estate executor

Kenny W. Martin
Kenny Martin Memorial Scholarship Fund & Kenny Martin Charitable Fund • est. 2007
We take ‘forever’ very seriously.
At Marion Community Foundation, that’s how long we plan to be here. That’s how long you can expect the good you and your fund do to benefit the Marion community. In this section, we will show you how seriously we take fund management. You will learn about our:

- Chief Investment Officer
- Local investment managers
- Investment Committee
- Investment Policy
- Asset Allocation
- Spending Policy

Administrative Services
Once your fund is created, we handle all the rest.

- investing
- tax reporting
- selection committees
- bookkeeping
- following all state and federal laws & regulations
- correspondence
- promotion
- payment of awards
- auditing
- annual reporting
- follow-up with organizations & colleges

That’s our job and we do it well. We currently administer more than 390 funds. We prudently invest to ensure that the assets will be available in both good and not-so-good economic times. We are a trusted name and leader in the Marion area, fostering philanthropy consistent with community values.
Chief Investment Officer

Marion Community Foundation retains independent contractors such as Clearstead Advisors to provide the services of Chief Investment Officer. Clearstead is an independent institutional and wealth advisory firm whose mission is to help institutions like Marion Community Foundation meet their objectives with appropriate risk and in a low-cost manner. Clearstead specializes in financial advising for nonprofit endowments like community foundations, universities, hospitals, pension plans, and similar entities. They have more than $26 billion under advisement and more than 154 institutional clients in 42 states.

Services specific to the needs of community foundations:

- effective investment policy design
- spending policy analysis
- asset allocation aligned with spending policy
- performance monitoring and evaluation of investment managers
- compliance with regulations such as UPMIFA
- donor support and services

By the very nature of being a community foundation, Marion Community Foundation takes a fiscally conservative, long-term approach to investments. Clearstead provides us with expert investment advice, strategies, and oversight to help us achieve our goal to serve Marion. Forever.

Learn more about Clearstead by visiting www.clearstead.com.

Local Investment Managers

The Foundation’s portfolio is diversified and investment responsibility is spread among five local investment managers. We take pride in working with local firms and people you know. They work hard to achieve the most advantageous, conservative, long-term investment vehicles available to us. These firms are overseen by our CIO, Investment Committee, and Board of Directors and include: Stifel, Merrill Lynch, 3D Private Wealth Advisors, Whetstone Financial, Lehman Capital Management Group, and Edward Jones.
We Do All the Work

“When money realizes that it is in good hands, it wants to stay and multiply in those hands.”

– Idowu Koyenikan, author of *Wealth for All*

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**Investment Committee**

The Investment Committee is a subsidiary group to our Board of Directors. It includes nine members. Presently, this includes:

- **Megan Queen, Chair**
  A former chair and member of our Board of Directors; Vice President/Senior Insurance Analyst for the Irrevocable Life Insurance Trust Asset Review Team at J.P. Morgan Chase & Co.

- **John Colla, CIO**
  Chief Investment Officer on contract with Clearstead Advisors

- **John Bartram**
  Member and former chair of our Board of Directors and attorney with the Marion firm of Bartram & Bartram

- **Charlie Garvin**
  A past chair and former member of our Board; an ophthalmic surgeon and physician executive at OhioHealth Marion Area Physicians

- **Dr. Justin Hamper**
  Member of our Board of Directors and North Region Director of Pharmacy Services for OhioHealth

- **Scott Knowles**
  CEO and General Counsel of Sims Brothers Recycling and board member since 2017

- **Fred Manter**
  Non-voting, non-board member; principal with the firm of Holbrook & Manter CPAs

- **Ryan McCall**
  Member of the Board of Directors since 2018 and president of Marion Technical College

- **Dr. Chuck Speelman**
  Superintendent of Tri-Rivers Career Center & Center for Adult Education and Board member since 2016

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**Investment Policy**

Marion Community Foundation’s stewardship of its funds addresses both sides of the equation—both a prudent investment policy and a prudent spending policy—which protect the sustainability of our funds. We utilize an institutional investing strategy, as opposed to the retail investing model most individuals use. Community foundations invest in a manner that produces steady returns annually in order to support the community programs and causes for which the foundation was created. Such a diversified, conservative strategy will not produce especially high returns in bull markets; conversely, it also will not produce drastically low returns in bear markets. The goal—and the challenge—is to produce returns which sustain annual spending requirements for the Foundation’s mission, while preserving the long-term value of the donors’ original gifts.
Asset Allocation

Our investment policy includes a diversity of investments. The chart below provides a snapshot of the array of our current asset allocation.

<table>
<thead>
<tr>
<th>Asset Class</th>
<th>Target</th>
<th>Range</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equity-Like</td>
<td>60%</td>
<td>30-50%</td>
<td>43.2%</td>
</tr>
<tr>
<td>Domestic Equity</td>
<td>40%</td>
<td>9-19%</td>
<td>14.7%</td>
</tr>
<tr>
<td>International Equity: Developed Markets</td>
<td>14%</td>
<td>4-12%</td>
<td>6.5%</td>
</tr>
<tr>
<td>International Equity: Emerging Markets</td>
<td>6%</td>
<td>0-10%</td>
<td>4.7%</td>
</tr>
<tr>
<td>Alternatives</td>
<td>10%</td>
<td>0-10%</td>
<td>4.7%</td>
</tr>
<tr>
<td>Private Equity</td>
<td>10%</td>
<td>0-15%</td>
<td></td>
</tr>
<tr>
<td>Fixed Income-Like</td>
<td>30%</td>
<td>20-40%</td>
<td>22.5%</td>
</tr>
<tr>
<td>Fixed Income: Investment Grade</td>
<td>25%</td>
<td>0-10%</td>
<td>4.6%</td>
</tr>
<tr>
<td>Fixed Income: Non-Investment Grade</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Strategic Benchmarks:
- 44% Russell 3000 Index
- 15% MSCI EAFE Index
- 7% MSCI Emerging Markets Index
- 28% Barcap U.S. Aggregate Index
- 6% BofA Merrill Lynch U.S. BB-B High Yield Index

We Do All the Work
How do we calculate the amount of a grant or scholarship?
The amount of a grant or scholarship for each year is determined by multiplying our spending rate times an average market value of the fund over the previous 12 calendar-year quarters. We use an average in order to help reduce some of the market fluctuations that can affect the value of a fund at any given time. Let’s look at an example of how this works:

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Market Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/31/Y1</td>
<td>$126,147</td>
</tr>
<tr>
<td>6/30/Y1</td>
<td>$123,673</td>
</tr>
<tr>
<td>9/30/Y1</td>
<td>$138,644</td>
</tr>
<tr>
<td>12/31/Y1</td>
<td>$139,889</td>
</tr>
<tr>
<td>3/31/Y2</td>
<td>$137,214</td>
</tr>
<tr>
<td>6/30/Y2</td>
<td>$137,740</td>
</tr>
<tr>
<td>9/30/Y2</td>
<td>$141,445</td>
</tr>
<tr>
<td>12/31/Y2</td>
<td>$144,006</td>
</tr>
<tr>
<td>3/31/Y3</td>
<td>$142,365</td>
</tr>
<tr>
<td>6/30/Y3</td>
<td>$138,314</td>
</tr>
<tr>
<td>9/30/Y3</td>
<td>$140,663</td>
</tr>
<tr>
<td>12/31/Y3</td>
<td>$144,658</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>$1,654,758</strong></td>
</tr>
<tr>
<td>Divided by 12:</td>
<td>137,896</td>
</tr>
<tr>
<td>X 4.0%:</td>
<td>5,515</td>
</tr>
<tr>
<td><strong>Amount of grant or scholarship:</strong></td>
<td><strong>$5,515</strong></td>
</tr>
</tbody>
</table>

Spending Policy
We take our motto – *For You. For Marion. Forever.* – very seriously at Marion Community Foundation. In late 2017, the Board of Directors approved a conservative program spending rate of 4.0% for our funds, maintained a graduated spending rate reduction strategy to safeguard the long-term value of the funds when market conditions and other factors negatively impact a fund, and set administrative fee rates to 1.0% for all fund types.
“When we needed help, it came from every direction. The Marion community was a blessing. Now it’s our turn to give back.”

—Marsha Cushing, mother of accident victim Stormy Ray Cushing

“The Simple Process to Start a Fund

Stormy’s scholarship is the ultimate expression of what we are about at Marion Community Foundation.

“Stormy Ray” Cushing
Stormy Ray Cushing Scholarship Fund ▪ est. 2014
The Simple Process to Start a Fund

<table>
<thead>
<tr>
<th>Four Things to Consider</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Decide WHEN to Give</strong></td>
</tr>
<tr>
<td>You can create your fund now, provide for it in your will, or create a trust arrangement that benefits your family, as well as charity.</td>
</tr>
<tr>
<td><strong>2. Decide WHAT to Give</strong></td>
</tr>
<tr>
<td>Almost any kind of asset can be used to start your fund – cash, publicly traded securities, closely held stock, real estate, life insurance, retirement accounts, cryptocurrency, and tangible personal property.</td>
</tr>
<tr>
<td><strong>3. Choose the NAME of Your Fund</strong></td>
</tr>
<tr>
<td>Most of our funds are named for the donor, the donor’s family, or to honor or memorialize someone special.</td>
</tr>
<tr>
<td><strong>4. Choose a TYPE of Fund</strong></td>
</tr>
<tr>
<td>We offer a variety of funds that flexibly meet your charitable interests. These are detailed in Section 5 (Creating a Charitable Plan for You) and include:</td>
</tr>
<tr>
<td>Designated Funds</td>
</tr>
<tr>
<td>Field of Interest Funds</td>
</tr>
<tr>
<td>Donor Advised Funds</td>
</tr>
<tr>
<td>Unrestricted Funds</td>
</tr>
<tr>
<td>Scholarship Funds</td>
</tr>
<tr>
<td>Agency Funds</td>
</tr>
</tbody>
</table>
In Section 5, we detailed the variety of fund types available to you at Marion Community Foundation; now, we will look at the options you have for creating a fund and some important aspects of how to set one up.

Establishing your own named charitable fund does not require great wealth and it isn’t complicated. Working with a member of the Foundation staff, you (along with your financial and legal advisors, if you prefer) can easily establish a named charitable fund. Together we will:

- Consider your giving goals and charitable intent
- Review the various types of charitable funds available and determine which best fits your purpose
- Draw up the governing document that formalizes your giving intentions
- As part of the governing document (if allowed by the type of fund you’re creating), designate fund advisors, which might include yourself and your spouse, as well as successor advisors, such as your children
- Establish a name for your fund, which could be your own name, a family member’s, a cause, or one that will keep you anonymous
- Make an establishing gift using one or more of the various contribution options available

Do all the good you can.
By all the means you can.
In all the ways you can.
In all the places you can.
At all the times you can.
To all the people you can.
As long as ever you can.

– John Wesley
Starting a Fund
You’ve decided you want to create your charitable legacy through Marion Community Foundation. Now what?

Start by simply calling us at 740-387-9704.

We will set up an appointment so you can talk privately and confidentially with our President & CEO, Dean Jacob. Dean is a lifelong resident of Marion, an attorney, and a former teacher. He will guide and assist you to develop a charitable legacy that matches your objectives and vision. That process includes seven basic steps.

1. **Do you want to establish a scholarship or grant fund?**
   - Scholarships provide money to deserving students to assist with tuition, fees, books, supplies, and equipment required for courses of instruction at a college or university.
   - Grants provide needed money to support worthy nonprofit organizations, causes, or programs which are meaningful to you.

2. **Define the selection criteria for your scholarship or grant fund.**
   - If you are creating a scholarship fund, you can design the way the scholarship works. You may wish to designate the scholarship for students from a particular school or to open it up to students from several different schools. You may focus on students entering a particular college or university or pursuing a specific field of study.
   - On the other hand, you might decide to open the scholarship to all students no matter where they want to go to school or what they want to study. You could make academic achievement or financial need part of the selection process. You may decide to make your scholarship available only to existing college students or to non-traditional students. Just about any way you want to design your scholarship, we can help you create it.
   - If you are creating a grant fund, the possibilities are amazing! Creating a grant fund is a wonderful way to play a direct role in improving our community. Your options include the following:
     - Create a **designated** fund to support your favorite specific nonprofit organization.
Create a field of interest fund to support an area of interest, such as health care, the arts, education, history, or social welfare.

Create a donor advised fund if you want to be able to make recommendations to our Board of Directors for how the fund spends its money for worthy causes.

Create an unrestricted fund that allows our Grants Committee and Board of Directors to determine which projects are deserving of grant money based on community need.

How much do you want to be involved in the future?

If you prefer, you can be part of a selection committee that makes recipient recommendations to our Scholarship Committee. This process, although requiring a time commitment from you, can be rewarding.

If you have created a donor advised grant fund, you will recommend what organizations receive the benefits of the grant dollars each year.

On the other hand, you might decide to just leave the evaluation and decision-making process up to our experienced and dedicated Scholarship Committee, Grants Committee, and Board of Directors to thoroughly evaluate scholarship and grants applicants and select recipients that meet the standards you created.

If you have created a designated grants fund, we will ensure that your grant is awarded each year and the money distributed to your chosen designee.

How much do you want to give?

You may create your fund with as little as $100. Grant awards will begin when the value of the fund reaches a minimum of $5,000; similarly, scholarships awards will begin when the value of the fund reaches a minimum of $10,000.

The total amount of your gift is based upon your charitable goals and available resources. Our current Spending Policy makes annual awards in the amount of 4.0% of the average of the fund’s value for the 12 previous quarters. A fund with an average value of $5,000 will produce an annual grant of $200. If you want to award a grant or scholarship of $1,000 each year, you should plan to establish an endowment fund of $25,000. A fund with an average balance of $100,000 can award $4,000 annually.

The Simple Process to Start a Fund

Diane M. Craig

A teacher and coach at Ridgedale High School for more than 32 years, the late Diane M. Craig established the Craig Scholarship in the final days of a terminal illness. Always supportive of “her kids,” she created this scholarship to support seniors and graduates of Ridgedale pursuing degrees in medicine, health, engineering, and education.

Diane passed in 2009, but her scholarship and memory will last forever at Marion Community Foundation.
Annual grants and scholarships will continue forever because we only award grants and scholarships based on a percentage of the value of the fund, which we expect to remain steady or slowly grow based on our prudent Investment Policy. Simple math shows the power of your initial donation when looking at the long-term aspect of a permanent endowment fund.

Consider your options. How will you contribute to your fund?

- You might decide to donate the full minimum balance at the time the fund is created. You can do this with cash or many other types of assets—stocks and bonds, insurance policies and proceeds, IRA distributions, real estate, cryptocurrency, even grain and livestock! We can work with you and your financial and legal advisors to help you with all the particulars and various benefits (including tax deductions) of the different types of assets used for your donations.

- If you can’t give the minimum balance at this time, start your fund with a gift of $100 and we’ll help you devise a plan for attaining your goal. This plan might include fund raising, obtaining gifts from family and friends, or structuring a consistent plan of regular donations to the fund. We call these acorn funds and we’ll help you watch it sprout and grow!

- Another way to reach the minimum balance or more is by way of a planned gift. With this method, you start the fund with $100 and then plan to make a more substantial donation at some time in the future. We call these legacy funds and we will work closely with your financial advisor, tax advisor, banker, insurance professional and attorney to implement your plan. By establishing a legacy fund, your wishes and plan are established in writing, but the plan will be funded at a later time, such as at your passing or that of your spouse. The plan will be funded by a bequest from your will or by naming your fund at Marion Community Foundation as a beneficiary of your IRA, 401(k) or other retirement plan, annuity, life insurance, payable on death (POD) bank accounts, or transfer on death (TOD) investment accounts. We will work with your attorney, accountant, banker, insurance agent, or financial advisor to help you set up the appropriate documentation.

- Of course, you, your friends, and your family can add to the fund at any time!
The Simple Process to Start a Fund

**Name your fund.**

- A charitable fund at Marion Community Foundation will be established in your name, your family name, or someone in your family, your organization, or anyone you wish to honor or memorialize. All grants made—today and in the future—are awarded to charities in the name of the fund. It’s a beautiful way to link your community investment with a special person or purpose, forever.

- The specific name of the fund will be one you choose. The name can be simple, descriptive, or even creative. Examples of names of some of our current funds are as follows:
  - “C” Fund (to keep the donor anonymous)
  - Chester & Mildred Roberts Fund
  - Elgin High School Wider Horizons Scholarship Fund
  - Parrott Family Fund
  - Stephen J. Chaney Memorial Scholarship Fund
  - Loudenslager Agricultural Leadership Fund
  - Marion County Red Cross Endowment Fund
  - Mary H. Hollaway Humane Society Fund
  - Meredythe & John McDaniel Fund
  - Poorman Palace Theatre Fund
  - Farison Family Helping Hands Fund

**Sign a straightforward fund agreement that we prepare for you.**

Our Board of Directors then approves the fund. The first grant or scholarship will commence in the calendar year immediately following twelve (12) consecutive months after which the fund attained the principal’s minimum value.

**We do the rest. For You. For Marion. Forever.**

That’s it. We’ll do the rest: investing, correspondence, tax reporting, promotion, selection committees, payment of the awards, bookkeeping, auditing, annual reporting, and following all state and federal laws and regulations. We’ll ensure that the money goes directly to the college or nonprofit organization and is being used exactly as intended. That’s our job and we do it well. We currently have more than 390 funds. We prudently invest $63 million in assets to ensure that funds are available in both good and not-so-good economic times. We are a trusted name and leader in the Marion area, fostering philanthropy consistent with community values.

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**Janis Swepston**

In memory of his wife, Janis, the late Greg Swepston (1938-2020) created a field of interest fund, the *Janis & Greg Swepston Family Fund*.

Janis, who passed in 2013, was the Marion Public Library’s children’s librarian for 30 years. Given her love for reading and young people, it is no surprise that the fields of interest for this fund are literature and elementary education, as well as live theater, the performing arts, and animal welfare.
The Simple Process to Start a Fund

Unique Ways to Give
Livestock and grain. Stocks. IRA distributions. Corporate matching gifts. Real estate. Cryptocurrency. And, of course, cash. If you want to create a fund at Marion Community Foundation, we can help you—no matter how unique the gift.

The word “philanthropy” usually brings to mind the notion of giving money; but, cash, while easy, is far from the only way to reach your planned giving goals. At Marion Community Foundation, our professional staff and financial advisors can help you make arrangements for a wide variety of gifts.

Cash Gifts
Yes, cash is still accepted—as are checks and credit cards. Gifts can be mailed in, dropped off at our lovely home inside the historic Stengel-True Museum, or made electronically via the secure, online credit card portal on our website — www.MarionCommunityFoundation.org. The GIVE tab on our website will allow you to explore your options.

IRA Gifts
Thanks to the PATH Act of 2015, if you are 72 or older, you can have your annual required minimum distributions (RMD) from your traditional IRA sent directly to Marion Community Foundation. Although these direct IRA distribution gifts are not deductible by you on your tax return, by having them donated directly to the Foundation, they will not be counted as income. This is an especially good gift to consider if you don’t itemize your tax deductions. We will work with your plan administrator to help you accomplish this gift.

Long-Term Appreciated Stock Gifts
Giving stock is really easier than you might think and it gives a double tax break — no capital gains tax on the appreciation and a deduction for the entire gift. We will work with your financial advisor to help you choose the stock(s) that will provide the most benefit and help you through the simple gifting process.

Real Estate Gifts
Like appreciated stock, the gift of appreciated real estate avoids the capital gains tax and you get a charitable deduction for the full fair market value of your real estate. Cryptocurrency, such as Bitcoin, is treated similarly to stock or real estate for tax purposes — providing both a tax deduction and the benefit of no capital gains.

“Giving is not just about making a donation. It is about making a difference.”
- Kathy Calvin
The Simple Process to Start a Fund

**Corporate Matching Gifts**
A number of employers in the Marion area (and elsewhere) encourage their employees’ philanthropy by offering a corporate match for donations made to charity. Marion area businesses with such a program include Whirlpool, Nucor, Dostal & Kirk, Merrill Lynch, State Farm, Sims Brothers, and Meijer. Individuals can establish funds at Marion Community Foundation and apply to their corporate matching gift program as a unique way to grow their fund.

An example of this is Rick & Nancie Poorman’s Palace Theatre Fund, established in 2015. Rick made his career with Whirlpool and, concurrent with creating his funds, applied to the appliance manufacturer’s corporate matching gifts program as a unique way to grow their fund.

**Agricultural Gifts**
Yes, we can even accept gifts of livestock and grain. Contact us for more information.

**Gifts of Poorly Performing Stock**
Using stock that has decreased in value is also a good way to make a charitable gift. You can then claim the capital loss on your tax return and get a tax deduction for the cash gift.

**Life Insurance Gifts**
If you have a life insurance policy you no longer need, consider naming Marion Community Foundation as the owner and beneficiary of the policy. By doing so, you receive a charitable deduction for the cash value or the adjusted basis. Premium payments can also be deducted as a charitable gift. A new policy on your life naming us as beneficiary guarantees us a future gift as well. Many other options regarding life insurance are available. We will work with your insurance agent to easily accomplish this gift.

**Life Income Gifts**
These are a little more complicated, so you may have to call us, but basically there are financial vehicles such as Charitable Remainder Trusts, Charitable Lead Trusts, and Charitable Gift Annuities which allow you to transfer assets now to Marion Community Foundation while you continue to receive income from those assets. This type of gift is a good fit for people who hold assets that would make beautiful gifts at some time in the future, but currently need those assets for income. Life income gifts such as these can increase your income for life, give you a generous charitable contribution for the year of the gift, and, if the gift is stock, avoid capital gains taxes. Please see the next page for a detailed description of how a Charitable Gift Annuity works.

**Wills & Trusts**
If you’re not quite ready to make a gift at this time, but you do want to establish your legacy to the Marion community, you can easily make Marion Community Foundation the beneficiary of your will, trust, TOD, or POD designations. Options include designating a fixed dollar amount of your gift or a percentage of your estate. Either way, we will work with your attorney and financial planner to ensure this is an easy process and that the correct language is used in your estate planning documents to create the gift.
Charitable Gift Annuity*

A charitable gift annuity is a life income gift with components of both a charitable gift and a financial investment. It creates a legacy fund and a lifetime stream of annual income for you, the donor.

By establishing a charitable gift annuity of $10,000 or more, our donors will receive a fixed and guaranteed payment for the remainder of his or her lifetime(s) and the balance remains with the Foundation to carry out the donor’s charitable intentions in perpetuity.

Charitable gift annuities can be created with a wide variety of types of gifts (see pages 40-41) and establish any fund type the donor wishes (see pages 20-25). The basics of how such a gift works are illustrated below.

Example

- Phil & Ann Thropy create their own unique fund by donating $100 to Marion Community Foundation.
- Phil & Ann donate, for example, $250,000 through the purchase of a charitable gift annuity (CGA).
- The CGA will payout $3,125 every three months—$12,500 annually with a 5% payout rate, $8,000 of which is tax free.**
- Whatever remains in the CGA at the time of the donors’ passing will be distributed to the Phil & Ann Thropy Fund.
- Marion Community Foundation will make grant donations from the fund every year in memory of Phil & Ann to support the charity of their choosing — that they cared so much about — forever.

* in partnership with The Columbus Foundation

** These amounts and this illustration are based on a hypothetical situation and point in time. You will need to contact us for the specific terms of your CGA, based on your age and current annuity rates.

How a charitable gift annuity works

Donor signs an annuity agreement with Marion Community Foundation; makes a lump-sum donation and takes a partial tax credit.

Donor receives payments on a fixed schedule for life per the terms of the annuity agreement.

Marion Community Foundation receives the balance of the invested funds upon the donor’s passing.

Donation is invested by the Foundation.
Thank You

The fact that you have delved into this level of detail about Marion Community Foundation is very telling of your interest level. We appreciate that.

In this appendix you will find further information on our:

- **Mission & Vision**  
  pages 44-45
- **Professional Staff**  
  pages 44-45
- **Board of Directors & Committee Structure**  
  pages 46-48
- **History**  
  pages 49-51
- **Audited Financial Statement**  
  pages 52-53
- **Our Family of Endowment Funds**  
  pages 54-64
Appendix

Mission

Our mission is to continually improve the Marion area community through philanthropy, leadership & civic engagement.

Our Staff

DEAN L. JACOB is Marion Community Foundation’s President and Chief Executive Officer, following careers in law and education. He is a graduate of River Valley High School, the University of Notre Dame, and The Ohio State University College of Law. He had been an attorney in private practice since 1986, concentrating much of his practice in estate planning and probate. In 1998, Dean changed to a part-time law practice and became a teacher at River Valley Middle School. Active in the community, he has served as president of the Marion County Bar Association, Marion Rotary Club, Marion Noon Kiwanis, the River Valley Education Foundation, and St. Mary Parish Pastoral Council. Dean is a past member of the board of directors of United Way of Marion County, the Marion Area Chamber of Commerce, and the Wopat Family YMCA. Born and raised in Marion, he and his wife, Sue, have two adult children, Kate and Austin, and one grandchild, Jake. Dean.Jacob@MarionCommunityFoundation.org

JULIE PRETTYMAN is the Vice President and Director of Programs for Marion Community Foundation. Julie earned a bachelor’s degree in business marketing from The Ohio State University. She has previous experience with volunteer development, grants program management, and donor relations at the Ohio 4-H Foundation. She has an extensive background in project management and office administration, organization and process development, and strategic and business planning. Her career includes positions at CT Consultants (formerly Floyd Browne Group), Goodwill, March of Dimes, and The Ohio State University at Marion. Julie and her husband, Cy, reside in the New Bloomington area. JuliePrettyman@MarionCommunityFoundation.org

DIANA RINESMITH is Marion Community Foundation’s Office Manager. Diana joined the staff in June 2001 after serving as office manager for a local dentist and an administrative assistant for Customization Services with Exact Macola Software. She lives in Marion and has a daughter, Terra. Diana@MarionCommunityFoundation.org
Our vision is a generous, educated, healthy, collaborative & vibrant community.

LORI S. STEVENSON is the Communications Manager for Marion Community Foundation. She holds a journalism degree from Bowling Green State University and has made a 30-year career in nonprofit public relations. Her areas of expertise include marketing communications, media relations, publications, and social media management. Prior to joining the staff, Lori served as a marketing consultant to the Foundation, helping to launch its newsletter, *Legacy*, and serving as editor for 15+ years. A life-long resident of Marion, she and her husband, Jim, have three children. LoriS@MarionCommunityFoundation.org

DIANE MAULT is the contracted bookkeeper and accountant for Marion Community Foundation, having served since 1999. A lifelong resident of Marion County, Diane and her husband, Richard, have owned and operated a local bookkeeping and tax preparation business for 39+ years. Her community involvements include: Marion County Historical Society, Marion Speech & Hearing Center, Stengel-True Museum, Love INC of Marion County, and Marion Investment Trust, among others. The couple has three married children. dlm@MarionCommunityFoundation.org

KATHY CONLEY is Marion Community Foundation’s Operational Assistant. She maintains the Foundation’s databases, mailing lists, and reports, as well as assists all other staff. Her areas of expertise are systems, finance consolidation reporting & variance analysis. A Marion resident since third grade, Kathy holds an associate degree from Marion Technical College and has previously worked at the former Community Memorial Hospital and 40+ years in the telecommunications industry. She has two adult children in the area. kathyconley@marioncommunityfoundation.org

JOHN COLLA serves Marion Community Foundation as Chief Investment Officer on a contract basis. He is a Managing Director with Cleveland-based Clearstead, an independent institutional and wealth advisory firm. John has nearly a decade of experience with investment markets, is a CFA Charterholder, and holds degrees and certificates from the University of North Carolina, Youngstown State University, and Hiram College. jcolla@clearstead.com
2021-22 Board of Directors

The Marion Community Foundation Board of Directors is comprised of 15 local professionals who serve on rotating 3-year terms and meet monthly to direct the operations of the Foundation. Board members may serve up to three consecutive terms.

Scott Knowles is the Chair of the Board of Directors and has served since 2017. He serves on our Investment Committee. He is the CEO and General Counsel for Sims Brothers Recycling in Marion.

Fran Voll is the Vice Chair of the Board of Directors. He rejoined the Board in 2015, having previously served in 2006-08. He serves on the Marketing & Development committee. Fran has made a career as an educator, administrator, coach, and athletic director at the high school and collegiate levels.

Dr. Chuck Speelman is the Secretary of the Board of Directors and has served since 2016. He serves on the Investment and Audit committees. Chuck is the Superintendent of Tri-Rivers Career Center & Center for Adult Education.

Nicolle Wampler is the Treasurer of the Board of Directors and a member since 2017. She serves on the Grants Committee, chairs the TEACH Grants subcommittee, and co-chairs the Racial Equity & Justice Grant subcommittee. She is the Deputy Warden of Special Services at Marion Correctional Institution.

Kathy Goodman is the Immediate Past Chair of the Board of Directors and has served since 2013. She chairs the Scholarship Committee. Kathy is a retired educator from the Marion City Schools and former college counselor for the I CAN Center of Excellence.

John C. Bartram has served on the Foundation’s Board since 2013. He chairs the Audit committee and serves on the Investment committee. John is an attorney with the Marion firm of Bartram and Bartram.

Jody Demo-Hodgins joined the Board of Directors in 2019. She chairs the Grants committee and co-chairs the Racial Equity & Justice Grant subcommittee. Jody is the former executive director for the Crawford-Marion ADAMH Board.
**Grant Gates** joined the Board of Directors in 2021 and serves on the Marketing & Development and Grants committees. Grant is the Wholesale Territory Manager of Morral Companies, Inc.

**Dr. Justin Hamper** joined the Board of Directors in 2020. He serves on the Investment and Audit committees. Justin is the North Region Director of Pharmacy Services for OhioHealth.

**Luke Henry** joined the Board of Directors in 2016. He serves on the Marketing & Development Committee. Luke is the founder and owner of ProScape Lawn & Landscape Services in Marion, Classic Northern Investments, and is a registered pharmacist.

**Rev. Daniel Kiger** has served on the Board of Directors since 2013. He serves on the Grants and Marketing & Development committees. Dan is a retired minister.

**Spencer Mathews** joined the Board of Directors in 2021. He serves on the Scholarship and Marketing & Development committees. Spencer has been the General Manager of Mathews Ford Marion automobile dealership since 2005.

**Dr. Ryan McCall** joined the Board of Directors in 2018. He serves on the Investment committee. Ryan is the President of Marion Technical College.

**Sarah Rassell** joined the Board of Directors in 2021. She serves on the Scholarship Committee. Sarah is a Community Relations executive with her family business, Wilson Bohannan Lock Company.

**Kevin Smith** joined the Board of Directors in 2021 and is a member of the Scholarship Committee. Kevin is the Regional President of The First Citizens National Bank.
Appendix

# 2021-22 Board Committees & Programs

## EXECUTIVE and GOVERNANCE & POLICIES
(includes nominating duties and Gift Acceptance committee)
- Scott Knowles - Chair
- Fran Voll - Vice-Chair
- Chuck Speelman - Secretary
- Nicolle Wampler - Treasurer
- Kathy Goodman - Immediate Past Chair

## INVESTMENT
- Megan Queen, Chair (non-board member)
- John Bartram
- John Colla (non-voting; Clearstead/CIO)
- Charlie Garvin (non-board member)
- Justin Hamper
- Scott Knowles
- Fred Manter (non-voting; non-board member)
- Ryan McCall
- Chuck Speelman

## SCHOLARSHIP
- Kathy Goodman, Chair
- Olivia Davis (non-board member)
- Larry Geissler (non-board member)
- Sue Jacob (non-board member)
- Ruth Johnston (non-board member)
- Spencer Mathews
- Sarah Rassell
- Kevin Smith

## MARKETING & DEVELOPMENT
- Nikki Workman, Chair (non-board member)
- Daniel Bradshaw (non-board member)
- Grant Gates
- Luke Henry
- Dan Kiger
- Spencer Mathews
- Elaine Merchant (non-board member)
- Lori Stevenson (staff)
- Fran Voll

## AUDIT
- John Bartram, Chair
- Justin Hamper
- Chuck Speelman
- Nicolle Wampler (Board Treasurer)

## GRANTS
- Jody Demo-Hodgins, Chair
- Grant Gates
- Dan Kiger
- Kevin Smith
- Nicolle Wampler

### COMMUNITY GRANTS SUBCOMMITTEE
- Jody Demo-Hodgins, Chair
- Kelly Garrett (non-board member)
- Grant Gates
- Henry G. Heinzmann (non-board member)
- Johnnie Jackson (non-board member)
- Dan Kiger
- Kevin Smith
- Kim Stark (non-board member)
- Nicolle Wampler

### TEACH GRANTS SUBCOMMITTEE
- Nicolle Wampler, Chair
- Ed Crawford (non-board member)
- Vidya Iyengar (non-board member)
- Paddy Pezley (non-board member)

### RACIAL EQUITY & JUSTICE GRANTS SUBCOMMITTEE
- Jody Demo-Hodgins, Co-Chair
- Nicolle Wampler, Co-Chair
- Candace Floyd (non-board member)
- Dana Haniif-Booker (non-board member)
- Johnnie Jackson (non-board member)
- Sarita Lawrence (non-board member)
- Evelyn Lisiecki (non-board member)
- Cara Stevens (non-board member)

### YOUTH ENGAGED IN PHILANTHROPY
- Kate McCleese (non-board member)
Appendix

History

Marion Community Foundation has been, since even before its inception, focused on caring for the community of Marion, Ohio. What is now known as Marion Community Foundation began in healthcare as the Ohio MedCenter Foundation.

Jumping back even further, we can trace our roots to 1957 when Dr. Frederick Smith and Dr. Philip Smith created the Mary Elizabeth Smith Foundation to honor their mother and support the Frederick C. Smith Clinic started by their father. The Smith Foundation was supported by donations from the Clinic’s original 10 doctors, as well as several local businesses. Through funding from the Smith Foundation, Community Memorial Hospital was opened in 1962. In 1972, the hospital was renamed MedCenter Hospital and the Mary Elizabeth Smith Foundation became the Ohio MedCenter Foundation.

The Foundation owned the hospital and clinic buildings. It was the sale of these assets to OhioHealth in February 1998, which, along with a name change, became Marion Community Foundation. The creation of a community foundation was the intention of the former MedCenter board, including then-chair Robert M. Wopat, to continue charitable work in Marion.

Marion Community Foundation owes a debt of gratitude to the long-term vision of the Smith brothers, as well as Robert Wopat, who went on to leave his $17 million estate to the Foundation in 2008—as well, of course, to all the donors who have helped Marion Community Foundation grow and positively impact the communities of Marion County.

Marion Community Foundation was officially reorganized in May 1998 and by September, Deborah Shade was on board as the Foundation’s first full-time president and chief executive. The initial staff also included administrative assistant Nancy Weir.

Offices for the “new” foundation were established at 238 E. Center St., a 15-member board of trustees organized, and Marion Community Foundation’s mission as the philanthropic clearinghouse for the Marion area was off and running. In short order—by December 1999—the Foundation established its first donor fund, announced its first cycle of community grants, and had a scholarship program taking shape. That year saw the establishment of the “C” Fund, the Foundation’s the first unrestricted fund, and the Marion Area Auxiliary Scholarship Fund became the first scholarship fund. Two months later, Marion Community Foundation awarded its first academic scholarship to nursing student Brandi Mooney. By November, the Foundation’s second grant cycle was announced and the Marion Family YMCA created the first organizational endowment fund. In 2000, Brad Bebout succeeded Shade as president and CEO.

Foundation Presidents Past & Present:

Deborah Shade
1998-2000

Brad Bebout
2000-2013

Dean L. Jacob
2014-Present
An annual program of competitive grant awards was, by 2001, well established and growing. That year saw the addition of Diana Rinesmith as administrative assistant, as well as the establishment of eight new funds, including two additional scholarships. Rinesmith continues to present, serving as office manager.

In 2002, another eight funds were established at Marion Community Foundation, bringing assets to $13 million, and adding the Jack V. & Violet M. Griffith Fund as the first designated fund. The Griffith Fund supports the Marion Homeless Shelter, Quality of Life Hospice, and Lutheran Social Services.

Marion Community Foundation’s first website was launched in 2003. By 2011, when the scholarship portfolio had grown to nearly 50 funds, the Foundation launched an online scholarship application to keep pace with the hundreds of annual applications for the $150,000 being awarded each year. In 2003, Marion Community Foundation reached the $1 million mark in total grants and scholarships awarded.

In 2004, the Foundation had outgrown its offices and moved into the first floor of the historic Stengel-True Museum at 504 S. State St., where it currently resides. This was the first year of its annual Holiday Open House, an ever-popular event which has come to be recognized as the kickoff to the holiday season in the community.

Marion Community Foundation, by 2005, managed 48 funds. It was this year that began the review process which would culminate nearly four years later with the receipt of National Standards accreditation from the Council on Foundations. This designation placed Marion Community Foundation among the ranks of top community foundations in the country and verified that it met the highest standards of operational quality, integrity, and accountability.

The next two years saw the addition of 24 funds and $2 million in assets - bringing the total assets to more than $15 million. Marion Community Foundation passed the $2 million mark in overall grant and scholarship awards. By 2008, Marion Community Foundation celebrated its 10th birthday and its firm establishment as the premier philanthropic organization for Marion residents to achieve their planned giving goals. Following on the heels of this milestone, late in 2008, Marion Community Foundation received a landmark gift which doubled the Foundation’s size. Three funds were created by the late Robert & Dorothy Wopat, totaling $17 million. The Wopat Funds substantially support numerous community organizations, causes, and scholars in perpetuity. The Judge Thomas K. Jenkins Scholarship Fund was established 2008 as the Foundation’s first post-graduate scholarship, making annual awards for students pursuing careers in law.
The legacy of A. Merle Hamilton, life-long Marion resident and noted philanthropist, became part of Marion Community Foundation in 2010 with the establishment of five new funds from his estate in support of several local organizations and causes.

Ohio-based firm Lancaster Pollard was hired in 2011 to serve the Foundation as Chief Investment Officer. Now known as Clearstead, the Cleveland-based wealth management firm assists and advises the Foundation’s Board of Directors in maintaining and proactively developing investment and spending strategies and policies.

By 2012, Marion Community Foundation was steward to more than 140 funds and the Wopat Scholarship became the largest fund in the annual Scholarship Program. The following year, 2013, assets topped $40 million and the Foundation launched a web-based philanthropic management software system to provide online access to donors, grantees and scholarship applicants, providing complete transparency of operations.

On January 1, 2014, Dean Jacob became the third president and CEO of the Foundation. Next came Julie Prettyman, who, as Vice President and Director of Programs oversees the scholarship program, grants program, affiliated organizations, and special events, all of which continue to grow at the Foundation. In 2015, Lori S. Stevenson joined the staff as Communications Manager after having served on a consultant basis since 2004.

In 2015, the Joe Slanser Fund was created by the Foundation’s second largest gift from an individual—$3.5 million. A designated fund, it supports Epworth United Methodist Church and the Marion Union Station. In 2017, Marion Community Foundation launched the MarionMade! community pride initiative to create a positive attitude among local residents, businesses, and visitors and promote the good people, places, products, and programs of Marion, Ohio; it is now coordinated by Marion Technical College.

By late 2019, the Foundation reached a new milestone - assets north of $50 million - and continued to grow, even during the coronavirus pandemic, to $63 million by early 2021 in 390 charitable funds. Throughout most of 2020, and into 2021, Marion Community Foundation operated under pandemic protocols, with the majority of the staff working remotely and Board and committee meetings held via teleconference. The scholarship and grants programs continued on schedule, awarding $430,000 and $511,000 respectively in 2020. Two new grants programs were added to address specific community needs - the Teaching, Educating And Classroom Help (TEACH) Grants for local K-12 teachers and the Racial Equity & Justice Grant Program. Operational Assistant Kathy Conley joined the staff to manage our increasingly complex information and data systems needs.
# Appendix

## 2020 Financial Statement

The figures stated herein are for the fiscal years ending June 30, 2020 and 2019. They are excerpted from the annual audit of Marion Community Foundation prepared by Holbrook & Manter, CPAs.

The full report, including Marion Community Foundation’s complete list of funds and grants, is available upon request and may be viewed online at www.MarionCommunityFoundation.org

### Financial Position

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CURRENT ASSETS:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$1,599,328</td>
<td>$923,292</td>
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<tr>
<td>Investments, at fair value</td>
<td>49,606,241</td>
<td>49,975,246</td>
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<tr>
<td>Prepaid expenses</td>
<td>22,107</td>
<td>23,540</td>
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<td><strong>Total current assets</strong></td>
<td>51,227,676</td>
<td>50,922,978</td>
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<tr>
<td><strong>PROPERTY AND EQUIPMENT:</strong></td>
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<tr>
<td>Equipment</td>
<td>28,409</td>
<td>26,059</td>
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<tr>
<td>Less accumulated depreciation</td>
<td>(18,571)</td>
<td>(16,204)</td>
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<tr>
<td><strong>Total equipment</strong></td>
<td>9,838</td>
<td>9,855</td>
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<tr>
<td><strong>Total assets</strong></td>
<td>$51,237,514</td>
<td>$50,931,933</td>
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</table>

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CURRENT LIABILITIES:</strong></td>
<td></td>
<td></td>
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<tr>
<td>Accts pybl &amp; accrued expenses</td>
<td>$15,950</td>
<td>$15,512</td>
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<td>Grants and scholarships payable</td>
<td>1,002,329</td>
<td>622,658</td>
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<td><strong>Total current liabilities</strong></td>
<td>1,018,279</td>
<td>638,170</td>
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<td><strong>LONG-TERM LIABILITIES:</strong></td>
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<td>Agent liabilities</td>
<td>4,287,006</td>
<td>4,301,350</td>
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<td><strong>Total liabilities</strong></td>
<td>5,305,285</td>
<td>4,939,520</td>
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<td><strong>NET ASSETS:</strong></td>
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<td></td>
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<tr>
<td>Unrestricted</td>
<td>45,932,229</td>
<td>45,992,413</td>
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<tr>
<td><strong>Total liabilities &amp; net assets</strong></td>
<td>$51,237,514</td>
<td>$50,931,933</td>
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</table>

### Activities & Changes in Net Assets

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
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<tbody>
<tr>
<td><strong>REVENUES &amp; OTHER SUPPORT:</strong></td>
<td></td>
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</tr>
<tr>
<td>Contributions</td>
<td>$1,058,881</td>
<td>$5,866,984</td>
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<td>Net unrealized gain on investments</td>
<td>(350,229)</td>
<td>406,385</td>
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<td>Net realized gain on investments</td>
<td>884,477</td>
<td>1,401,073</td>
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<td>Dividends and interest</td>
<td>1,031,668</td>
<td>966,905</td>
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<tr>
<td>Fundraising event - Gala</td>
<td>2,500</td>
<td>74,098</td>
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<tr>
<td>Other income</td>
<td>445</td>
<td>4,043</td>
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<tr>
<td><strong>Total revenues &amp; other support</strong></td>
<td>2,627,742</td>
<td>8,719,488</td>
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<tr>
<td><strong>EXPENSES:</strong></td>
<td></td>
<td></td>
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<tr>
<td>Grants and scholarships</td>
<td>1,813,715</td>
<td>1,368,093</td>
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<tr>
<td>Investment fees</td>
<td>283,465</td>
<td>275,723</td>
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<tr>
<td>MarionMade!</td>
<td>73,016</td>
<td>45,930</td>
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<tr>
<td>Personnel</td>
<td>313,535</td>
<td>290,646</td>
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<tr>
<td>Operations</td>
<td>201,436</td>
<td>197,951</td>
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<tr>
<td>Other</td>
<td>1,186</td>
<td>2,716</td>
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<tr>
<td>Fundraising: Gala</td>
<td>1,573</td>
<td>28,115</td>
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<tr>
<td><strong>Total expenses</strong></td>
<td>2,687,926</td>
<td>2,209,174</td>
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<tr>
<td><strong>Change in net assets</strong></td>
<td>(60,184)</td>
<td>6,510,314</td>
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<tr>
<td>Total net assets beginning of year</td>
<td>45,992,229</td>
<td>39,482,099</td>
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<tr>
<td>Total net assets end of year</td>
<td>45,932,229</td>
<td>45,992,413</td>
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</table>
### Statements of Cash Flows

#### CASH FLOWS FROM OPERATING ACTIVITIES:

<table>
<thead>
<tr>
<th>Description</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in net assets</td>
<td>$(60,184)</td>
<td>6,510,314</td>
</tr>
<tr>
<td>Adjustments to reconcile the change in total net assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>to net cash used by operating activities:</td>
<td></td>
<td></td>
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<tr>
<td>Depreciation</td>
<td>2,373</td>
<td>2,957</td>
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<tr>
<td>Net realized and unrealized gain on investments</td>
<td>(534,248)</td>
<td>(1,807,458)</td>
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<td>Increase in prepaid expenses</td>
<td>1,433</td>
<td>(10,687)</td>
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<td>(Decrease) increase in accounts payable and accrued expenses</td>
<td>438</td>
<td>(2,646)</td>
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<tr>
<td>Increase in grants and scholarships payable</td>
<td>379,671</td>
<td>30,403</td>
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<tr>
<td>(Decrease) increase in agent liabilities</td>
<td>(14,344)</td>
<td>(11,558)</td>
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<tr>
<td>Net cash used by operating activities</td>
<td>(224,861)</td>
<td>4,711,325</td>
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#### CASH FLOWS FROM INVESTING ACTIVITIES:

<table>
<thead>
<tr>
<th>Description</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net (contributions to) proceeds from investments</td>
<td>(1,288,183)</td>
<td>(4,967,949)</td>
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<tr>
<td>Purchases of equipment</td>
<td>(2,350)</td>
<td>(2,848)</td>
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<td>Net cash (used) provided by investing activities</td>
<td>(1,290,533)</td>
<td>(4,970,797)</td>
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<td>Net change in cash and cash equivalents</td>
<td>1,515,394</td>
<td>(259,472)</td>
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<td>Cash and cash equivalents at the beginning of year</td>
<td>3,114,772</td>
<td>1,182,764</td>
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<tr>
<td><strong>Cash and cash equivalents at the end of year</strong></td>
<td><strong>$1,599,328</strong></td>
<td><strong>$923,292</strong></td>
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</tbody>
</table>

#### SUPPLEMENTAL DISCLOSURE OF CASH FLOW INFORMATION:

<table>
<thead>
<tr>
<th>Description</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash paid for: Interest &amp; Income taxes</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
Appendix

Our Family of Endowment Funds

Boys & Girls Club Endowment Fund
Emanuel Lutheran Church Elsie L. Ackerman Fund
Emanuel Lutheran Church Marion L. Apple & Thomas James Helwig Fund
Emanuel Lutheran Church Lester P. DeLong Fund
Emanuel Lutheran Church Charlotte E. Dennison & Alvin K. Sanford Fund
Emanuel Lutheran Church Norman W. Fott & Donna Ruth Fott Fund
Emanuel Lutheran Church Good Samaritan Fund
Emanuel Lutheran Church Dorothy M. Hall & Donald F. Ulrich Fund
Emanuel Lutheran Church Rita M. Herbst Scholarship Fund
Emanuel Lutheran Church Radio Fund
Emanuel Lutheran Church Robert & Margaret Mather Fund
Emanuel Lutheran Church Caroline L. Ulsh Fund
Father Fred Furey Fund for Marion's Catholic Schools
Don & Betty Jerew's Emanuel Lutheran Church Fund
Marion Area Humane Society Endowment Fund
Marion County 4-H Endowment Fund
Marion County Children's Home Endowment Fund
Marion Goodwill Endowment Fund
Marion Harding Athletic Booster Club Fund
Marion Shelter Program, Inc. Organizational Endowment Fund
Marion Senior Center Endowment Fund
Marion Technical College Foundation BMA Technologies Fund
Marion Technical College Foundation Warren & Jan Brown Fund
Marion Technical College Foundation Bryson Family Leadership Fund
Marion Technical College Foundation Betty M. Dietsch Fund
Marion Technical College Foundation Joel Draper Fund
Marion Technical College Foundation Education Equity Fund
Marion Technical College Foundation Gary Ellis Business Builders Fund
Marion Technical College Foundation Alejandro Garcia Blessings Fund
Marion Technical College Foundation Douglas & Virginia Geib Fund
Marion Technical College Foundation HPM Fund
Marion Technical College Foundation James & Zymilla Hamilton Fund
Marion Technical College Foundation Peter & Barbara Miller Fund
Marion Technical College Foundation Kable Fulfillment Corporation Fund
Marion Technical College Foundation Geraldine McFadden Kuhn Fund
Marion Technical College Foundation Wayne Kuhn Fund
Marion Technical College Foundation Mary Alice Lyon Fund
Marion Technical College Foundation Marion Rotary Club Fund
Marion Technical College Foundation John E. Martin Fund
Marion Technical College Foundation Ohio MedCenter Fund
Appendix

Unrestricted

Grants from these funds are made at the discretion of Marion Community Foundation’s Board of Directors.

Agency

Marion Technical College Foundation J.C. Penney Fund
Marion Technical College Foundation Joseph Sansotta Fund
Marion Technical College Foundation Smith Clinic Fund
Marion Technical College Foundation Frederick G. Smith, MD, Memorial Fund
Marion Technical College Foundation Philip W. Smith Fund
Marion Technical College Foundation Philip W. Smith, MD, Memorial Fund
Marion Technical College Foundation GTE North/Verizon Fund
Marion Technical College Foundation Wyandot, Inc. Fund
Marion Technical College Foundation MTC Foundation Fund
Marion YMCA Endowment Fund
Mary C. Lombardo’s St. Vincent de Paul Society Fund
The Ohio State University at Marion Endowment Fund
Ruth Reynolds’ Eye-to-Eye Fund
Trella Romine Stewardship Fund
Stengel-True Museum Endowment Fund
Turning Point Organizational Endowment Fund
United Way Endowment Fund
Women’s Club Home Endowment Fund

Conway Family Charitable Fund
Maurice & Jeanne Cornell Memorial Fund I
Jane Ann Caton Dean Fund
Donald & Barbara Everly Family Fund
Forever Remembered Charitable Fund
Founders’ Fund
“G” Fund
Granger Family Fund
Hall Family Fund
A. Merle Hamilton Fund
Henry Heinzmann Fund
Paul & Susan Ludwig Charitable Fund
"O" Fund
John D. O’Shea & Kathleen E. O’Shea Fund
Rick & Nancie Poorman Fund
Chester & Mildred Roberts Fund
Russell & Jerlene Rosebrough Fund
Daniel V. & Terri A. Tobin Fund
## Appendix

**Donor Advised**

Grants from these funds are directed by specifically named individuals or groups.

- Ray & Charlotte Baldauf Fund
- Bebout Family Fund
- Dave & Anne Brown Family Fund
- David R. Campbell & Diane K. Campbell Charitable Fund
- Maurice & Jeanne Cornell Memorial Fund II
- James & Margaret Coulson Charitable Fund
- William Kay Davis Non-Endowed Fund
- Randy & Rosalie Drazba Family Fund *in memory of Carmella Sauro*
- Jeremy P. Dunn Fund
- Noel & Maria Eboh Family Fund
- Ellirae Donor Advised Fund
- Walter Linn & Colleen Fiant Fund
- Kit & Lori Fogle Family Fund
- Al & Karen Goldsberry Fund
- Malcolm & Kathy Goodman Fund *in memory of Eve Goodman*
- Dr. Robert & Christine Haas Family Fund
- Hall Economic Development Fund
- Mary H. Hollaway Donor Advised Fund
- Mary H. Hollaway Non-Endowed Fund
- Chief Jack Holliday Memorial Fund
- Dean & Sue Jacob Family Fund
- Dean & Sue Jacob Non-Endowed Fund
- George & Norma Jacob Charitable Fund
- K Family Charitable Fund
- KSAN Charis Fund
- Loudenslager Agricultural Leadership Fund
- Ila Madia Charitable Fund (non-endowed)
- Fred & Joan Manter Non-Endowed Fund
- Marion County Bar Association Endowment Fund
- Marion Education Foundation Fund
- Marion Historical Site Visit Non-Endowed Fund
- McClellan Family Fund
- Parrott Family Fund
- Tracy & Seth Pearch Non-Endowed Fund
- Kathy & Bradley Ridge Family Fund (non-endowed)
- Richard W. Rinehart & Mildred H. Rinehart Charitable Fund
- Ron & Laura Scharer Fund
- Tom & Cindy Schifer Family Non-Endowed Fund
- Shepard-Melhuish Memorial Fund
- Dalton J. Sipes Peace Fund
- Sisler Family Fund
- Smith-Brown Family Fund
- Spencer C. Stephens Flamingo Fund
- Stuckey Family Non-Endowed Fund
Toney & Winders Families Fund
Henry A. True Trust Non-Endowed Fund
Roger & Janice Vanover Family Fund
Evelyn E. Walter Foundation Non-Endowed Fund
We Remember Al Fund
Whetstone Financial Fund
Robert M. & Dorothy C. Wopat Community Fund
Beverly S. Young Fund
Youth Engaged in Philanthropy Fund
S. Fredrick & Suzanne Zeigler Charitable Fund

Patricia Anne Chapman Animal Welfare Fund
Child Care Choices Fund
  Supports qualified child care providers with classroom materials & equipment
Helen Cunningham Handicapped Fund
  Promotes the general welfare and recreation for persons with disabilities
Jerry Grubaugh Memorial Fund
  Supports programs for treatment of individuals with HIV in the Dominican Republic
Health Care Fund & Health Care Community Impact Fund
  Addresses the health care needs of Marion County
Imagination Library Fund
Virgil Jerome Nature Education Fund
  Supports programs and organizations providing nature education for youth
Vera O. McDanel Senior Citizens Transportation Fund
  Supports senior citizens’ transportation needs
Marion Community Development Non-Endowed Fund
  Supports community and economic development in Marion County (Ohio)
Marion Noon Lions Club Fund
  Supports sight conservation and sight-impaired residents of Marion County
Marion Speech and Hearing Fund
  Supports services for individuals with speech, language, and hearing impairments
Kathleen E. O’Shea Fund
  Supports live theatre and dance performances in Marion County
Pillar Credit Union Teachers Fund
  Provides classroom and program support for Marion County teachers
Prospect Park Non-Endowed Fund
Prospect SUNSWIM Pool Fund
Janis & Greg Sweepston Family Fund
  Supports programs for literature, education, live theater/performing arts & animal welfare
Francis & Thelma Wise Fund
  Supports prevention programs for arthritis, Parkinson’s disease, and vision impairment

Field of Interest
Grants from these funds meet needs in a particular field selected by the fund’s creator
Appendix

**Designated**
Grants from these funds support specific organizations selected

- **Don & Deb Alspach Fund**
  Benefits the Marion Tallgrass Trail of Prairie Parks Foundation

- **Ida Barlow Brilliance Award Fund**
  Supports the Marion Federation of Women's Clubs' annual award

- **Dr. & Mrs. Glen Burton, Jr. Memorial Fund**
  Benefits the Prairie Parks Foundation

- **Marion Family YMCA “Doc” Butterworth Scholarship Fund**

- **Jacob R. Cannon Memorial Fund**
  Benefits students of Ridgedale Local Schools

- **Stephen J. Chaney Memorial Scholarship Fund**
  Provides annual tuition assistance to students attending St. Mary Elementary School

- **Patricia Anne Chapman Helping Hands Fund**
  Benefits Marion City and River Valley Local Schools

- **James C. Cooper’s St. Mary Church Fund**
  Benefits St. Mary Elementary School in Marion

- **Rebecca S. Craig Family Education Fund**
  Benefits the Palace Cultural Arts Association

- **Betty L. Davis Fund I**
  Supports staff development at Marion Area Counseling Center

- **Betty L. Davis Fund III**
  Benefits the League of Women Voters of Marion

- **Jerry & Betty L. Davis Palace Theatre Fund**

- **Jerry Davis Prairie Parks Foundation Fund**

- **Developmental Disabilities Fund**

- **Epworth United Methodist Church Endowment Fund**

- **Farison Family Helping Hands Fund**
  Benefits student-athletes at Pleasant High School

- **Gene & Jan Farison Family Fund**
  Benefits United Way of Marion County, Palace Cultural Arts Association & Epworth United Methodist Church

- **Fout-Price Memorial Fund**
  Benefits Marion General Hospital Hospice

- **Jack V. & Violet M. Griffith Family Fund**
  Benefits Marion Shelter Program, Quality of Life Hospice & Lutheran Social Services of Central Ohio

- **Don & Peggy Hall Family Fund**
  Benefits the Palace Cultural Arts Association

- **F. Riley Hall & Geraldine A. Hall Memorial Fund**
  Benefits the Stengel-True Museum

- **A. Merle Hamilton Centenary United Methodist Church Fund**

- **A. Merle Hamilton Central Christian Church Fund**

- **A. Merle Hamilton Epworth United Methodist Church Fund**

- **A. Merle Hamilton Marion County Historical Society Fund**

- **Warren G. Harding Home & Presidential Center Endowment Fund**

- **Mary H. Hollaway Humane Society Fund**

- **Mary H. Hollaway Palace Theatre Fund**

- **Nobel F. Hollaway YMCA Scholarship Fund**

- **Huber Museum Fund**
Norma Jacob St. Vincent de Paul Society Fund
Merle & Evelyn Lashey YMCA Fund
Leapin’ Outreach Center Fund
Legal Aid Society Endowment Fund
Let’s Read 20 Endowment Fund
Linn School Endowment Fund
Lust Family Fund
  Supports the Ackerman Medical Fund at the Emanuel Lutheran Church
Marion CAN DO Fund
Marion County Red Cross Endowment Fund
Marion Matters Endowment Fund
Marion Palace Theatre Perpetual Care Fund
Marion Public Library Endowment Fund
Kenny Martin Charitable Fund
  Benefits the Palace Theatre, Marion Union Station, and a non-profit organization selected each year by Marion Community Foundation
Johnny McDaniel Memorial Fund
  Benefits the Marion Area Humane Society
Meredythe & John McDaniel Fund
  Benefits Epworth United Methodist Church and the Marion Palace Theatre
David K. Miller Fund
  Benefits the Marion County Historical Society
Louis & Susan Nemeth Fund
  Benefits the Marion Area Humane Society
Parrott Family Emanuel Lutheran Church Fund
Pleasant Music Boosters Fund
Poorman Palace Theatre Fund
Prexy Play Scholarship Fund
  Reduces pay-to-participate fees for deserving students at Marion Harding High School and Grant Middle School
Arthur J. & Jo Ann Radwin Journalism Fund
Jo Ann Radwin-Zimmerman Bridge Out of Poverty Fund
  Benefits Marion Matters
Jean Zoeller Reas Endowment Fund
  Benefits St. Mary Parish and Calvert High School of Tiffin and St. Ursula Academy of Toledo
Mike & Betty Rogerson’s Charitable Fund
  Benefits the Marion Palace Theatre, Thiel College, American Red Cross, Marion Area Humane Society, Salvation Army, Marion Senior Citizens Association, Boys & Girls Club, & Habitat of Humanity
Thomas E. Ruzzo Endowment Fund
  Provides educational/recreational opportunities at the Edward J. Ruzzo Juvenile Justice Center
Gladys Simpson & Melvin Ulery Memorial Fund
  Benefits the Center Street Community Health Center
Joe Slanser Epworth United Methodist Church Fund
Joe Slanser Marion Union Station Fund
SSG Shannon M. Smith “No Fear” Fund
  Benefits Ohio Fallen Heroes Memorial Inc. and the Wounded Warrior Project
### Scholarships

- Pamela Stone United Way Impact Fund
- Sutherland Family Eye Care Fund
  - Benefits the Center Street Community Health Center's ophthalmic care, treatment, & services
- Terradise Nature Preserve Fund
  - Benefits Prairie Parks Foundation for the care and programs of the Terradise Nature Preserve
- Judge William Wiedemann Family Fund
  - Benefits United Way of Marion County, Marion Technical College, and The Ohio State University at Marion
- Wopat Family’s YMCA Fund
- William D. & Alice L. Young Fund
  - Benefits the First Church of the Brethren of Marion
- Dan Zimmerman & Jo Ann R. Zimmerman YMCA Fund
- Daniel H. Zimmerman Presbyterian Church Fund
- Alex Family Scholarship Fund
- Altrusa Club of Marion Scholarship Funds I & II
- A.B. & Hazel Augenstein Scholarship Fund
- Irene Ballinger Memorial Scholarship Fund
- Bergmann Family Scholarship Fund
- Helen & Bob Bintz Scholarship Fund
- Catherine Amelia Thew Brown Memorial Scholarship Fund
- William & Martha Buckingham Scholarship Fund
- Stephen J. Byrnes & Mary “Sally” Byrnes Scholarship Non-Endowed Fund
- Caledonia Alumni Association Scholarship Fund
- Carey Family Scholarship Fund
- Joe & Peggy Casey Scholarship Fund
- Civitan Club of Marion Scholarship Fund
- Dr. Wayne Collier Scholarship Fund
- Community's Memorial Scholarship Fund
- Bill & Joan Cones Scholarship Fund
- Clare Cooke Performing Arts Scholarship Fund
- Cornell/Goodman Scholarship Non-Endowed Fund
- Craig Scholarship Fund
- “Stormy Ray” Cushing Scholarship Funds
- Marge Sorreles Davies Memorial Scholarship Fund
- Dr. Kathy Dixon Memorial Scholarship Fund
- Brenda Dye Music Boosters Scholarship Fund
- Elgin Alumni Association Scholarship Fund
- Elgin High School Wider Horizons Scholarship Fund
- Helen E. Evans Scholarship Fund
- Everett Family Scholarship Fund
- Catherine Leila Ferguson Memorial Scholarship Fund
- Donna M. Flach Scholarship Fund
- James A. Flickinger Memorial Scholarship Fund
- Eric Benjamin Foos Memorial Scholarship Fund
Isabel Freer Memorial Scholarship Fund
Carol S. Geissler Memorial Scholarship Fund
Kathy & Malcolm Goodman Scholarship Fund
John T. Gordon Memorial Eagle Scout Scholarship Fund
Gladys & Everett Granger Memorial Scholarship Fund
Dr. James S. & Mary Gray Greetham Memorial Fund
William & Marjorie Grover Scholarship Fund
Jerry Hamilton Memorial Scholarship Fund (non-endowed)
Harper-Stuckey MTC Scholarship Fund
Harris Scholarship Fund
Charles L. Hastings Memorial Scholarship Fund
Marguerite Marcelin Hastings Memorial Scholarship Fund
Allyson M. Haycox Memorial Scholarship Fund
Geraldine M. Hedges Memorial Scholarship Fund
Wayne Hoch Memorial Scholarship Fund
Roger & Donna Holbrook Memorial Scholarship Fund
Art & Anne Huggler Memorial Scholarship Fund
Erin Y. James Memorial Scholarship Fund
Judge Thomas K. Jenkins Scholarship Fund
Jerew Family Memorial Scholarship Fund
Adam Johnston Memorial Scholarship Fund
Donald B. Justice Memorial Scholarship Fund
Aris Kasotis Memorial Scholarship Fund
Kaufman Family Memorial Scholarship Fund
Kory Kirkpatrick Memorial Scholarship Fund
Louise Kling Memorial Scholarship Fund
John F. Kreis Memorial Scholarship Fund
Mandy Kruder Memorial Scholarship Fund
Dr. Sarah Kulkofsky Memorial Scholarship Fund
LaRue Alumni Association Scholarship Fund
Stephanie K. Lust Memorial Scholarship Fund
Marion Academy of Medicine Scholarship Fund
Marion Area Auxiliary Scholarship Fund
Marion Elks Lodge No. 32 Scholarship Fund
Marion Noon Kiwanis Club Scholarship Funds I & II
Marion Rotary Club Scholarship Non-Endowed Fund
Marion Rotary Club’s George Brown Scholarship Non-Endowed Fund
Marion Rotary Club’s Warren Brown Scholarship Non-Endowed Fund
Marion Rotary Club’s Robert C. Dowd Scholarship Non-Endowed Fund
Marion Rotary Club’s Catherine Ferguson Scholarship Non-Endowed Fund
Marion Rotary Club’s Warren G. Harding Scholarship Non-Endowed Fund
Marion Rotary Club’s Robert E. Kibbey Scholarship Non-Endowed Fund
Marion Rotary Club’s R.T. Lewis Scholarship Non-Endowed Fund
## Scholarships

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<tr>
<th>Scholarship Fund</th>
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<tr>
<td>Marion Rotary Club’s Karl W. Schell Scholarship Non-Endowed Fund</td>
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<td>Marion Women’s Business Council Scholarship Fund</td>
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<td>Kenny Martin Memorial Scholarship Fund</td>
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<td>Alex Masters Memorial Scholarship Fund</td>
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<td>Vera O. McDanel Scholarship Fund</td>
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<td>Ted &amp; Elaine Mitchell Memorial Scholarship Fund</td>
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<td>Rocco Nicolosi Memorial Scholarship Fund</td>
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<td>Cheryl Oehler Memorial Scholarship Fund</td>
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<td>Charles E. Orcena Scholarship Fund</td>
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<td>John D. O’Shea &amp; Kathleen E. O’Shea Scholarship Fund</td>
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<td>Janet Palm Memorial Scholarship Fund</td>
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<td>Joe Petrich &amp; Al Beach Memorial Scholarship Fund</td>
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<td>Paul Pezley Baseball Scholarship Fund</td>
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<td>Jacob Pfeiffer &amp; Kevin Pfeiffer Memorial Scholarship Fund</td>
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<td>Pleasant Academic Boosters Scholarship Fund</td>
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<td>Pleasant Local Schools Board of Education Scholarship Fund</td>
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<td>Beatrice Prior Memorial Scholarship Fund</td>
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<td>Christopher B. Ream Scholarship Fund</td>
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<td>Dr. Herman &amp; Mrs. Jean Reas Scholarship Fund</td>
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<td>Gregory A. Rees Memorial Scholarship Fund</td>
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<td>Eugene &amp; Cecilia Reszczynski Scholarship Fund</td>
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<td>Eula M. Rhoads Scholarship Fund</td>
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<td>Ridgemont Scholarship Non-Endowed Fund</td>
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<td>David K. Rogers Memorial Scholarship Fund</td>
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<td>Max Ross Memorial Scholarship Fund</td>
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<td>Laura Rush &amp; Thomas Rosol Nursing Student Scholarship Fund</td>
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<td>Wesley &amp; Karen Schertzer Memorial Scholarship Fund</td>
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<td>John T. &amp; Lois Schmidt Scholarship Fund</td>
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<td>Eddie Shelton Agricultural Scholarship Fund</td>
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<td>Gary &amp; Diana Sims Family Scholarship Fund</td>
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<td>Danny C. Sipes Memorial Scholarship Fund</td>
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<td>Logan Stevens Memorial Scholarship Fund</td>
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<td>Stewie Family Scholarship Fund</td>
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<td>Daniel B. Stover Memorial Scholarship Fund</td>
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<td>Taft Middle School Music Department Scholarship Fund</td>
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<td>Helen M. Thew Memorial Scholarship Fund</td>
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<td>Three Sisters Nursing Scholarship Fund</td>
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<td>Herbert &amp; Jane Tillett Scholarship Fund</td>
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<td>Gary W. Troll Memorial Scholarship Fund</td>
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<td>Jeannette Turner Memorial Scholarship Fund</td>
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<td>United Church Homes Scholarship Fund</td>
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<td>Voll Family Bowling Green State University Scholarship Fund</td>
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Acorn

Growing and almost ready to award grants or scholarships

Douglas & Elaine Waring Memorial Scholarship Fund
John & Jackie Watkins Scholarship Fund
Whirlpool Corp/OneEnergy STEM Scholarship Fund
Jeannette White Memorial Scholarship Fund
Andrew Wigton Memorial Scholarship Fund
David G. Wilhelm Memorial Scholarship Fund
Beulah Mae Williams Scholarship Fund
Dr. Shelton & Becky Williams Scholarship Fund
Mary Ellen Withrow Scholarship Fund
Norman Withrow Golf Scholarship Fund
Robert M. & Dorothy C. Wopat Scholarship Fund
Youth Engaged in Philanthropy Scholarship Fund

Claridon Alumni Association Scholarship Fund
Alex Cooper Memorial Scholarship Fund
Charles R. Crisler Memorial Scholarship Fund
Joe & Martha Douce Maniaci Memorial Scholarship Fund
Elgin High School Wider Horizons Scholarship Fund
Barbara Jean Farrington Memorial Scholarship Fund
Freshour Family Scholarship Fund
“J” Fund
Tasha Jones Memorial Scholarship Fund
Ron & Effie Laapply Family Fund
Richard & Donna (Converse) Lawrence Scholarship Fund
Larry & Elaine Merchant Charitable Fund
Joan Zucker Milner Memorial Teachers’ Fund
Dr. Michael Murphy Memorial Fund
Charles Ransome Student Music Fund
River Valley Class of 1981 Scholarship Fund
River Valley Teachers’ Fund
Rob’s Hauling & Vance Family Scholarship Fund
Clifford & Frances Strine Family Scholarship Fund
Appendix

Legacy
Established funds to be fully funded through the donor’s planned giving

Larry & Sara Babich YMCA Heritage Fund
Ed & Vicki Bell Scholarship Fund
John & Carol Boblenz Epworth United Methodist Church Fund
John & Carol Boblenz Shriners Hospital Fund
John & Carol Boblenz YMCA Fund
Richard L. Borland Fund (unrestricted)
Glen & Lori Campbell Fund
  A designated fund created to benefit the Palace Cultural Arts Association
Rebecca S. Craig Scholarship Fund
FJ Designated Fund
FJ Unrestricted Fund
George & Evelyn Ghearing YMCA Fund
Daryl Kraner Fund
Cliff Edwards Fund
Dean & Sue Jacob United Way Diamond Pillar Fund
“K” Designated Fund
  A designated fund created to benefit Epworth Preschool/Daycare and Philanthropic Educational Organization, Chapter BP of Marion
“K” Scholarship Fund
Bonnie L. Lamb Scholarship Fund
Bud, Kay & Steve Lamb Memorial Fund (designated)
Jane Laucher’s Emanuel Lutheran Church Fund (designated)
Kent A. & Diana C. Morgan Family Scholarship Fund
Daniel L. Morrison Fund
  A field of interest fund to address children’s health and welfare
Daniel L. Morrison Shriners Hospital Fund
Bernie & Christine Nowacki Fund (donor advised)
Schneider Family United Way Diamond Pillars Fund
Elizabeth Shumaker Scholarship Fund
Brian & Denise Spires Fund
  A designated fund created to benefit Emanuel Lutheran Church
Brian & Denise Spires Scholarship Fund
Workman Family United Way Diamond Pillars Fund

Developing
Funds which have not been finalized

Dr. Raymundo L. & Aida S. Concepcion Memorial Scholarship Fund

July 2021