



Pathways to Giving

Summer 2011

HAMILTON COMMUNITY FOUNDATION



60 years of Making a Difference



2011 marks the Hamilton Community Foundation's 60th anniversary of improving the quality of life in the greater Hamilton area. The Hamilton Community Foundation was founded on Christmas Eve 1951 when a small group of community leaders signed the incorporation papers, paving the way for decades of leadership and stewardship. With just one \$5,000 fund in 1951, the Hamilton Community Foundation had a modest beginning that has exploded to more than 529 charitable funds and approximately \$73 million in assets today.

Dave Belew, HCF Trustee Emeritus, who in 2010 was awarded the inaugural David L. Belew Legacy Award for 50 years of outstanding service to the Foundation, recalls the phenomenal growth the Foundation has experienced. "It took us more than 20 years to reach our first \$1 million in assets. Now the Hamilton Community Foundation stands strong with more than \$70 million," said Belew. "The Foundation's growth is a testament to the tremendous people of this community who have given time, talent and treasure to ensure the Foundation continues to improve the quality of life in greater Hamilton—for good and forever."

"It's really exciting to celebrate the Foundation's 60th anniversary. Just looking at where we've come since 1951--the as-

set growth, the number of funds, the grants and scholarships awarded, the projects funded--it's all quite impressive. But it's when you look beyond the numbers and see the impact on this community and its residents that you really appreciate the importance of the Hamilton Community Foundation," said John Guidugli, President and CEO.

The Foundation will celebrate this important milestone at its Annual Meeting November 8, 2011 to be held at the Courtyard by Marriott Hamilton. The Board of Trustees, led by Board Chair Mike Dingeldein, Partner, SHP Leading Design, has a number of commemorative initiatives planned in recognition of HCF's 60th anniversary which will be unveiled that evening.

Pictured from Left to Right: Founders William Murstein, William J. Wolf, Huntington V. Parrish, Cyrus J. Fitton, Robert M. Sohngen, Frederick A. Reister, W. Otis Briggs, Jr.

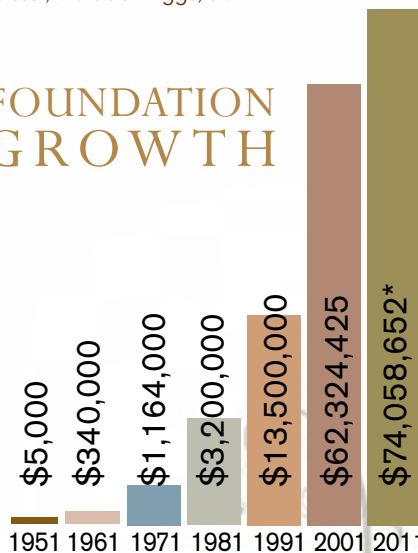
FOUNDATION OUTLOOK:

Charitable Funds: 529

Grants awarded since 1951: \$78,392,072

Scholarships awarded since 1954: \$6,765,060

FOUNDATION GROWTH



*pre-audit figures as of 4/30/11

LEADING PHILANTHROPY ... FOR GOOD. FOR EVER.

USE YOUR IRA TO SUPPORT THE CAUSES YOU CARE ABOUT

As part of the Tax Relief, Unemployment Insurance Reauthorization and Job Creation Act of 2010, legislators passed a two-year extension of Charitable IRA legislation, making it easier for you to give to the causes you care about including the Hamilton Community Foundation. The Charitable IRA provision, first enacted in 2006, has the power to help strengthen our community at a time when it is needed most. The extension will expire December 31, 2011.

During 2010 and 2011 only, holders of traditional IRAs who are at least 70 1/2 years old can make direct charitable transfers up to \$100,000 per year and bypass income tax. These charitable contributions also satisfy your required minimum distribution—a win-win for you, your tax bill and your favorite charities! Contact your IRA administrator to request a charitable distribution from your IRA account.

While unrestricted, scholarship and designated funds qualify for tax-free IRA transfers, donor advised funds do not.

The professional staff at the Hamilton Community Foundation is happy to offer you assistance as you plan your charitable giving. Contact us at 513-863-1717 for more information on charitable gift plans and the Charitable IRA provision.



Tax-free Charitable
Transfers from IRAs
will expire
December 31, 2011

USING THE CHARITABLE IRA LEGISLATION TO THE COMMUNITY'S ADVANTAGE

Since the Charitable IRA legislation was signed into law in 2008, Hamilton Community Foundation donors have established a number of new funds and significantly added to existing funds as they continue to support their charitable interests in this community...

- A loyal supporter of Badin High School recently established a designated fund to provide financial support for the school's tuition assistance program.
- Numerous churches have benefited from IRA contributions as donors established designated funds to provide annual gifts to their churches.
- A local donor family used their IRA distribution to establish a designated fund to support their scholarship program at Miami University. The IRA provision allowed them to maintain their charitable giving while preserving their income during a time when living expenses continue to rise.
- HCF worked with a couple to establish a new scholarship fund—something they had planned to do upon their death. Now, thanks to this provision, they are able to experience the impact of their gift during their lifetimes.

Foundation Leadership

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Katie Braswell
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Kelli Kurtz
VP of Development

Cynthia Parrish
Executive Director

Jeannie Payne
Accounting Manager

Diane Kurtz
Administrative Assistant

Contact us at
(513) 863-1717 or
visit our website at
www.hamiltonfoundation.org

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Retired Firefighter Continues to Give Back to His Community

W. STEVE & LINDA TIMMER FAMILY FUND

After more than 30 years helping others on the Hamilton Fire Department, Steve Timmer knew he wanted to spend his retirement doing what he loved most—helping our community. That's why he and his wife, Linda, established the W. Steve & Linda Timmer Family Fund when Steve retired as a Fire Captain this year. They plan to use their new donor advised fund to support many charitable interests including the beautification of Hamilton and its park system.



Community is their passion and they have long been involved with local organizations including Hamilton Rotary Club, YMCA, New London Hills Swim Club, Vision 2020, Hamilton Parks and Recreation Commission, and Accent Hamilton. Steve doesn't plan to lounge around in retirement—in fact, you can see him all around the city volunteering

as a master gardener in the upkeep of parks and landscaping, lugging blocks of ice during Ice Fest, and building sets for Rotary Presents productions.

Steve and Linda reside on the city's west side and have two children, Ashley (Arlington, Virginia) and Scott (Columbus, Ohio). The Hamilton Community Foundation welcomes the Timmer Family to our growing family of funds!



Hamilton Community Foundation
319 North Third Street • Hamilton, Ohio 45011-1624
Return Service Requested





Scholarship donors meet their 2011 recipients

Scholarship recipients and their families had an opportunity to meet the donors who made it possible for them to fulfill their educational dreams. More than 400 guests attended the scholarship program and reception May 25th at Miami University Parrish Auditorium. The program recognized more than 100 students selected as this year's scholarship recipients. More than \$300,000 in scholarships were awarded to this year's graduating seniors from our area schools. To date, nearly \$7 million in scholarships have been awarded since 1954.

We realize many of these scholarships would not be available if the families and organizations did not have someone to turn to for expertise and assistance in developing, promoting and administering their scholarship from start to finish. In addition, there is tremendous need among families for assistance in meeting the rising costs of higher education. It is for these reasons - and the belief that education is an investment in our future - that the Hamilton Community Foundation offers a scholarship program.

Visit our website to view more photos of our students and donors. Congratulations class of 2011!

Thank you to the scholarship selection committee for their dedication and commitment in reviewing more than 300 applications and assisting the Foundation in selecting our 2011 recipients. The committee includes: Marilyn Bowling, Linda DiBenedetto, Jill Hartford, Dave Lippert, Jim Paulus, Dr. Lee Sanders, Ronald Smith, Judy Stitsinger and Jeannie Weeks.



Y.E.S. Goes to College!

The Youth Exploring Success (Y.E.S.) program completed its first year in the Hamilton City School District. Amber Steele, the Y.E.S. Advocate, served more than 60 students during the 2010-11 school year and anticipates an additional 30 students during the 2011-12 school year. Steele monitors students' progress throughout their high school experience through frequent individual meetings.

Students involved with Y.E.S. develop ambitious but realistic goals, create a plan to achieve their goals, and participate in special career and academic oriented programs. One of the most popular special programs offered to Y.E.S. students are college campus

tour bus trips. Transportation and lunch are provided to the students and their parents. While on campus, participants receive admissions related information, a campus tour, and a dining hall style meal. Mrs. Steele is on hand throughout each of these tours, along with other school personnel, to ensure that all participants get the most out of the experience.

This is part of the Foundation's goal to help students pursue and succeed at post secondary education endeavors. If you would like to be part of this exciting program, please contact the Foundation at 513-863-1717 or kbraswell@hamiltonfoundation.org.



HCF Awards Nearly \$70,000 in Grants at June Meeting

The Hamilton Community Foundation Board of Trustees awarded nearly \$70,000 in grants and matching funds at its June 2, 2011 meeting. Capital grant requests, which are reviewed annually in June, were also evaluated and awarded.

Grant recipients include:

Living Waters Ministry—Dollar-for-dollar matching capital grant for up to \$25,000 for air conditioning units at the former Jefferson Elementary building.

Partners in Prime—\$12,000 capital grant for kitchen equipment to support the Meals on Wheels program; Dollar-for-dollar matching grant for up to \$6,000 for the purchase of fitness equipment for the Hamilton location.

Great Miami Rowing Center—Matching grant of up to \$25,000 to be used for operational expenses or scholarships for participation fees for Hamilton students.

The Foundation currently administers more than 529 charitable funds. For more information on our grant cycle, visit our website at <http://hamiltonfoundation.org/grantHowToApply.asp>



HCF also funded the new banners on the city parking garage, along with the SID and City of Sculpture. Downtown revitalization continues to be an important focus area in the Foundation's strategic plan.

Youth Philanthropy Committee Grants more than \$35,000 to Area Organizations

The Youth Philanthropy Committee, the youth grantmaking arm of the Hamilton Community Foundation, recently granted more than \$35,000 to area nonprofit organizations. Each year the group, comprised of 20 high school students from Badin, Hamilton, New Miami and Ross high schools, awards more than \$30,000 annually to area organizations serving the youth.



The organizations selected were Butler County School Supply Coalition, 4-H Carteens of Butler County, American Red Cross- Leadership Retreat, Bunker Hill Haven for Boys, Hamilton High School, One Way Farm of Fairfield, Inc., Boys/Girls Club of Hamilton, Big Brothers Big Sisters, Fitton Center for Creative Arts, Hamilton Living Waters Ministry, North End Citizens for Community Action - NECCA, Fitton Family YMCA, MetroParks of Butler County, City of Hamilton Police Dept. and the YWCA. To learn more about the projects supported, visit the

Foundation's website at www.hamiltonfoundation.org/YouthPrograms.

The Youth Philanthropy Committee was established in 2005 by the Board of Trustees of the Hamilton Community Foundation as a way to teach area youth the importance of philanthropy. Its primary goal is to teach young people about fund development for important projects and how to distribute funds to create the greatest impact in the community. One example is the responsibility of awarding grants from several field of interest funds established to support organizations serving our youth. These funds include the Children's Home Fund, the Hamilton Exchange Club Fund, the Albert Stuhlmüller Fund and the Foundation's unrestricted funds. For more information about the work of the Youth Philanthropy Committee contact Katie Braswell at kbraswell@hamiltonfoundation.org.

HCF Welcomes New Funds

The Hamilton Community Foundation has been a philanthropic partner to individuals, charitable organizations and corporate citizens for the past 60 years. We are pleased to welcome the following to our family of funds...

- 2011 World Disabled Water Ski Championships Fund
- Dick and Joan Beer Fund
- Carole's Canine Companions Fund
- Donald M. and Debbie Cisle Advised Fund
- Janet and Gene Eggleston Scholarship Fund
- Mary Pat Essman Fund
- Edwin and Esther Feintheil Memorial Scholarship Fund
- Susan Cisle and Mark R. Goodman Advised Fund
- Groth Family Fund
- Louise J. Lang Educational Fund
- C. Randolph Lukens Memorial Fund
- Lynn Davidson Waves of Hope Fund
- Parks and Recreation Millikin Arch Fund
- Anne and Steve Murray Advised Fund
- Cynthia Stever LifeSpan Fund
- W. Steve and Linda Timmer Family Fund
- Vision Commission Murals Project Fund

Important Dates...

Jerry E. Moore Memorial Antique and Classic Car Parade

July 23, Check www.antiquecars.org for parade route

HCF Board Meeting

October 6 (Deadline for grant proposals is September 1, 2011)



Annual Professional Advisors Conference

October 14, Miami University Voice of America Learning Center



Harry T. Wilks Hamilton Celebrates Education Dinner

October 27, Courtyard by Marriott

HCF Annual Meeting

November 8, Courtyard by Marriott



HCF Board Meeting

December 1 (Deadline for grant proposals is November 1, 2011)

Holiday Open House

December 7



Introducing Bryan Clontz...

2011 PROFESSIONAL ADVISOR CONFERENCE KEYNOTE SPEAKER



Bryan Clontz, CFP®, CLU, ChFC, AEP, CAP, serves as the president and co-founder of Charitable Solutions, LLC. Over the last 15 years, he has served as the director of planned giving for the United Way of Metropolitan Atlanta, director of planned giving at the national office of Boys & Girls Clubs of America and as vice president of advancement at The Community Foundation for Greater Atlanta. Bryan has

extensive experience in planned giving consulting, charitable gift annuities, non-cash asset receipt/disposition and donor advised funds.

He received a bachelor's degree in business administration from the College of Charleston, a master's degree in risk management and insurance from Georgia State University and a master's degree in financial services from The American College. At 24, Bryan became the youngest South Carolinian to earn the Certified Financial Planner designation (CFP®), and subsequently earned the Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Accredited Estate Planner (AEP) and Chartered Advisor in Philanthropy (CAP) designations.

Bryan serves on the National Committee on Planned Giving Board (2007-2010), editorial board of the Planned Giving Design Center, the Rate Recommendation and the Research Committee of the American Council on Gift Annuities (2003-2010), and on the Advisory Board of the American College Chartered Advisor in Philanthropy (CAP) designation program.

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Save the Date: October 14, 2011

Miami University Voice of America Learning Center

Continuing education credit eligible for accountants, attorneys, financial planners, life insurance underwriters, trust officers and wealth managers. For more information or to be added to our mailing list, contact us at pac@hamiltonfoundation.org.