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Hamilton
community foundation

PATHWAYS to Giving



FRITSCH FUND

Brings Financial Relief to Those With Cancer

Maureen ("Reenie") Fritsch was a giving person, balancing a busy family life and many volunteer activities at church, Meals on Wheels and the YWCA Literacy Program.

So it is only fitting that after she passed away in 2002 after 10 years of battling cancer, she is still helping others.

Tom Fritsch, Reenie's husband of 41 years, started the Maureen L. Fritsch Cancer Assistance Fund at the Hamilton Community Foundation shortly after his wife died. Through his own volunteer work, plus much time spent in doctor's office during the course of his wife's illness, Tom knew that sudden medical costs are a struggle for many people.

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Over the last 15 years, nearly \$350,000 has been granted from the fund to help cancer patients. The Maureen L. Fritsch Cancer Assistance Fund committee,

which approves all requests for help, has found that the main way the fund can assist is to help pay for the expensive prescription medications that often go hand in hand with a cancer diagnosis.

Individuals are referred to the fund by area physicians including Dr. Paula Wiesenberger and Associates of Oncology Hematology Inc. The Foundation partners with local pharmacies and, through the years, has helped cover transportation to medical appointments and other treatment related items.

The fund continues to grow through many charitable donations and an annual golf outing, held for the last 15 years. Reenie herself was an avid golfer and member of the Elks Ladies Golf League. *(continued on next page)*

FOUNDATION MISSION STATEMENT

"Building a better community through creative philanthropy, vision and leadership."

FOUNDATION VISION STATEMENT

"Continue to be the trusted resource for growing philanthropy and leading change to improve our community."

FRITSCH FUND *Brings Financial Relief to Those With Cancer (continued from cover)*

"We started this in Maureen's memory but it came to be more about the people we've been able to help," says Tom, who added that, over the years, the whole Fritsch family has been involved. "We appreciate all the contributors. If not for them, this project would be non-existent."

Destiny Griffin's father, Norman, had just started a new job when he was diagnosed with cancer in July of 2013. He was still in the waiting period for his health insurance to kick in at work and yet had several prescriptions he needed to start taking immediately. The family was referred to the Fritsch fund for financial help with his medications. "That was one less thing he had to worry about," says Destiny, adding that the fund was just part of the outpouring of

compassion she and her family received when her dad was battling cancer.

Shirley Rosmarin volunteered with Reenie for Meals on Wheels and knew her well. Years after Reenie died, Shirley contacted Tom to see if the Cancer Assistance Fund could help a high school classmate who had been battling cancer for 10 years. Shirley says that the fund provided relief for medical expenses in the last few years of her friend's life. "It was a Godsend for her," she added.

Thanks to generous contributions, The Maureen L. Fritsch Cancer Assistance Fund will continue to serve as a perpetual memorial to Reenie and a value she held dear -- helping others.



15th Annual Maureen L. Fritsch Cancer Assistance Fund Golf Outing

Saturday, June 17, 2017

1:30 p.m. Shotgun Start

Walden Ponds Golf Club

*For information on participation
or sponsorships, call 513.479.7114*

FOUNDATION GRANTS A LUCKY BREAK FOR BUSTER

A \$50,000 grant made recently from Hamilton Community Foundation to the Animal Adoption Foundation (AAF) rescue shelter will provide help for dogs and cats needing medical care. When animals need surgery, medical care, or training to overcome behavioral issues, it can keep them from being adopted. The grant was possible from a donation to Hamilton Community Foundation from an anonymous donor with a love for animals.

Just eight weeks after AAF received the grant, its board chair, Sharon Ollinger, received another unexpected surprise: a phone call about a three-year-old Chihuahua with a broken leg, the result of being deliberately thrown from a car window. "His leg was literally dangling," says Sharon.

"The original owner purchased a microchip from AAF," says Executive Director Carie Schultz, adding that when they were contacted about Buster, they immediately said they would do whatever they could to help. Buster required emergency surgery to place a pin and a plate were put in the small dog's leg. A three day hospital stay for Buster followed, and he is now recovering at the home of a volunteer foster family. Two to three times a week, he is taken to physical therapy, which aids in pain management, healing and strength building so that Buster can regain full use of the leg.

"The cats and dogs will pass on this generosity through love they give to (and receive from) their future families," said Carie Schultz, executive director, Animal Adoption Foundation.

\$3,500," she said, adding that if Butler had not made his way back to the Animal Adoption Foundation, with his severe medical condition and no owner in sight, euthanization would have been a very real possibility for him.

"Each month, we also spend approximately \$4,500 on non-emergency medical care," she said. "This includes diagnosis for illness, treatment, and routine vaccinations and procedures. The grant from the community foundation is helping us greatly with these costs."

"It's difficult to project our future needs for professional training services or emergency surgery because those needs are unpredictable" says Carie. "In the first 10 months of 2016, we spent \$12,914 on emergency medical care and \$47,778 on other veterinary services. We project that we will spend \$50,000 within 10-12 months."

"Just a little medical attention can give so many animals the opportunity to live a happy life with their new families," she adds. "The cats and dogs will pass on this generosity through love they give to (and receive from) their future families."

weeks after that. He is allowed to go on short walks and more out of crate time. I am very pleased with his progress as is the surgeon. The good news is that we are going to adopt him. Happy ending for all!"

"Emergency surgeries are expensive," says Carie Schultz, executive director. "We estimate that the bill will be at least



Buster with his new owner, Sharon Ollinger, a volunteer at the Animal Adoption Foundation. Sharon and her husband, Greg, adopted Buster after fostering him when he was undergoing treatment.



Walking on a treadmill in the water helps strengthen Buster's legs after surgery.



Buster on a balance board with his physical therapist.

MARCUM PARK *Comes to Life This Spring*



dedication of **MARCUM PARK**

Saturday, May 6, 2017 - 2 p.m.

Concert to follow by Hamilton High School Jazz Band

Just as spring flowers bloom, Hamilton residents will enjoy a new, much-anticipated park. The Hamilton Parks Conservancy is putting the finishing touches on the new Marcum Park, to be dedicated Saturday, May 6 at 2 p.m.

Joe and Sarah Marcum gifted more than \$3.5 million, the largest-ever private donation for a park in Hamilton, to Hamilton Community Foundation, to make the six acre park possible. "It's a wonderful thing to have a central area where the city can come together and enjoy a nice park" said Joe.

The Marcum family has been involved from start to finish with the planning and opening of the park, even choosing the types of trees that will grace the park. Both the Marcum family and the Hamilton Parks Conservancy wanted to ensure a well-planned park that would be enjoyable for all ages.

Foundation President/CEO John Guidugli says the new park fits perfectly with Hamilton's current revitalization projects as well as the Foundation's strategic plan, specifically the goal of enhancing community quality of life. "It is one more way to connect people to each other and to the growing vibrancy of our downtown."

In addition to their private family foundation, the Marcum's have established five charitable funds at the Hamilton Community Foundation. Joe Marcum is also a recipient of the David L. Belew award, given annually by the Hamilton Community Foundation to honor those who've made significant contributions of time, talent and resources to improve the quality of life in our community.





NEW MONTH – NEW LOCATION

HAMILTON COMMUNITY
FOUNDATION
ANNUAL MEETING

**THIRD STREET PLAZA
GERMAN VILLAGE**

Tuesday, September 19, 2017



FOR THE PAWLING'S, SERVING OTHERS IS A FAMILY AFFAIR

Pat and Debbie Pawling are part of a large family in its 4th generation of owning and operating McDonald's restaurants. The Schmidt family is well known for serving both hamburgers to their customers and generosity to their community.

The Pawling's are members of the Hamilton Community Foundation's Legacy Society, which means they have made plans to leave a charitable gift to the Foundation through their estate plan. The couple believes that they have been fortunate, and want to give back. They aren't interested in recognition, but feel it is important to share examples of giving. "I want to help create that giving spirit in someone else," says Pat.

Last year, the couple also began a scholarship at the Hamilton Community Foundation, The Pat and Debbie Pawling Scholarship Fund. They are both looking forward to seeing the scholarship awarded for the first time this May at the Foundation's scholarship reception. "You enjoy it when you can help someone else," says Debbie.

Establishing the scholarship was an easy decision for them. "We've always been with kids," says Pat, pointing out that 80 percent of their employees are age 18 and younger, which has provided many opportunities to mentor and help young people.

Pat said that when he and Debbie were dating, Debbie's father invited Pat to come work with him in the family business. He was unsure at first, but soon it became his career,

and now both of the Pawling's grown children are in the business as well. Pat and Debbie now own eight restaurants, most of them in the greater Hamilton area. Over the years, they had the opportunity to know many of their employees, which now number over 600.

“I want to help create that giving spirit in someone else,” says Pat.

Debbie grew up in Hamilton. Pat is from New York City, but moved here at age 16 when his dad took a job at US Plywood (which later merged with Champion paper). When his family first came to the area, they stayed at the former Fantasy Farm hotel while they were looking for a house to buy. He remembers that the animals from the Fantasy Farm would come right up the window of his brother and sister's room. "It was a culture shock for us, just coming from New York City," Pat remarks.

Debbie became involved with the McDonalds participation in the Adopt a School Program, where businesses will provide both volunteer hours and material items for a local school throughout the year. She spent many years at the former Buchannan Elementary School. Today, one of the employees at their Oxford McDonalds was a child Debbie tutored at the school. "We'll often run into our former employees when we're out," says Pat. "If they remind me which store they worked at I can often remember their name."

Their newly remodeled store on Erie Highway features murals of Hamilton's architectural landmarks. "We love everything that's Hamilton," says Debbie.



Stephen and Cathyann Berry
SD Berry Family Fund

YOUR PARTNER IN GIVING

Tools That Fit your Life

One of the unique aspects of giving to the Hamilton Community Foundation is that you can establish a fund in your name!

There are several options. One of the most popular is the **Donor Advised Fund**, which offers maximum flexibility for the donor. All grants distributed from your fund are awarded to nonprofit organizations of your choosing.

Sherry Armstead appreciates the convenience of having a Donor Advised Fund at the Foundation, where the staff writes and sends the donation checks, tracks the fund's balance and sends one consolidated acknowledgement for tax purposes. "It's a very valuable resource," says Sherry. "If I want to make an anonymous gift to a local charity, I can do so through my fund at the Foundation with just a phone call and they take care of it. In my case, I tend to support causes I am already familiar with, and this way, I do not receive multiple letters and solicitations at home."

Designated, Field of Interest and Scholarship Funds are other options offered by the Hamilton Community Foundation. We can help you choose what works for you based on your preferences and charitable interests.

Your gift to the Hamilton Community Foundation may be made in many forms, such as:

- **Cash**, which is tax deductible as provided under current law.
- **Appreciated Publicly-Traded Securities.** This type of gift avoids capital gains tax and allows the maximum tax deduction for the full market value of the gift. The Foundation also accepts closely-held stock and limited partnership interests.

- **A Bequest** in your will is a simple way to leave a lasting legacy.
- **A Life Insurance Policy**, which can be changed to designate the Foundation as the owner and/or beneficiary of a policy.
- **Retirement Fund Accounts**, which are often your largest asset. You can give all or part of these assets to the Foundation, both during your lifetime and/or at your death.
- **Real Estate** can be donated to the Foundation and deducted at full fair market value, up to 30 percent of your adjusted gross income. The Foundation sells the real estate and the net proceeds can be used to help you start a new fund or are added to your existing fund. Tangible personal property can be donated to the Foundation, which is also then sold.
- **A Charitable Remainder Trust** allows you (or other named beneficiaries) to receive lifetime income. Upon your death, the remaining principal creates a fund at the Foundation. You receive an immediate charitable deduction for a portion of the gift and avoid capital gains tax.
- **A Charitable Lead Trust** creates income for the Foundation for a specified period, after which the remaining principal is distributed to named beneficiaries. Gift and estate taxes are reduced with this type of gift.
- **A Charitable Gift Annuity** is a way to make a gift to the Foundation, and still receive an income for yourself or others. A donor agrees to contribute cash, stock or other assets to the Foundation, and in return, receives a fixed annuity payment for life, plus tax benefits. At the death of the donor, a portion of each annuity gift is used to create a charitable fund at the Foundation.
- **Transfer of Your Private Family Foundation** to the Hamilton Community Foundation offers many advantages, including lower overhead, Foundation staff to assist with your charitable goals, and a higher tax deduction for any future gift.

There is so much more we would like you to know!

To discuss how the Hamilton Community Foundation can make your philanthropic dreams come true, please contact us at 513.863.1717.

Giving Through Life Stages

We contemplate many important financial planning decisions throughout the stages of our life. We make large purchases, set savings and investment goals and plan for retirement. Among the most personal financial decisions are related to charitable giving. How people invest their charitable dollars reflects their individual values, says Ashlee Willis, financial advisor at Edward Jones in Hamilton.



Ashlee Willis
Financial Advisor, Edward Jones

There are special considerations for women. “Women are the biggest inheritors of money,” she adds. “Through different life stages, and because women tend to live longer, they control more and more of their family’s wealth.”

“It’s important to have a team of trusted advisors to reach out to,” says Ashlee. These may include a financial advisor, an attorney and an accountant. In addition, the community foundation is the local expert on local nonprofits and can help develop a tailored strategy that considers both financial goals as well as charitable wishes.

“Start talking with your family about the causes you believe in,” Ashlee says.

It is never too early to consider which charities’ missions align with your values, and to let your family know about your favorite charities. “Start talking with your family about the causes you believe in,” she says.

Common concerns as we age are saving for college for children or grandchildren, and trying to protect the financial future of loved ones. “Women tend to care for everybody else – but we need to remember to take care of ourselves,” adds Ashlee. “Don’t just plan for the unexpected. Plan for longevity.”

The Power of Your Future Gift

When making or updating your will, consider a gift to the Hamilton Community Foundation. Consult your estate planning attorney who can assist you in adding one of the following paragraphs to your will:

I hereby give, devise and bequeath (the residue) (____%) to the Hamilton Community Foundation to be used (for its general purpose) (for specific purpose)."

If you are leaving the proceeds of an insurance policy or IRA assets to the Hamilton Community Foundation, be sure to indicate this on the insurance or IRA beneficiary forms and not in your will because the insurance proceeds or IRA assets will be disposed of by the terms of the insurance policy or IRA document.

Those who have made plans to include the Foundation in their estate are members of our Legacy Society. Legacy Society members are invited to a special thank you dinner, held every other year. Please contact us if you are considering joining the Legacy Society.





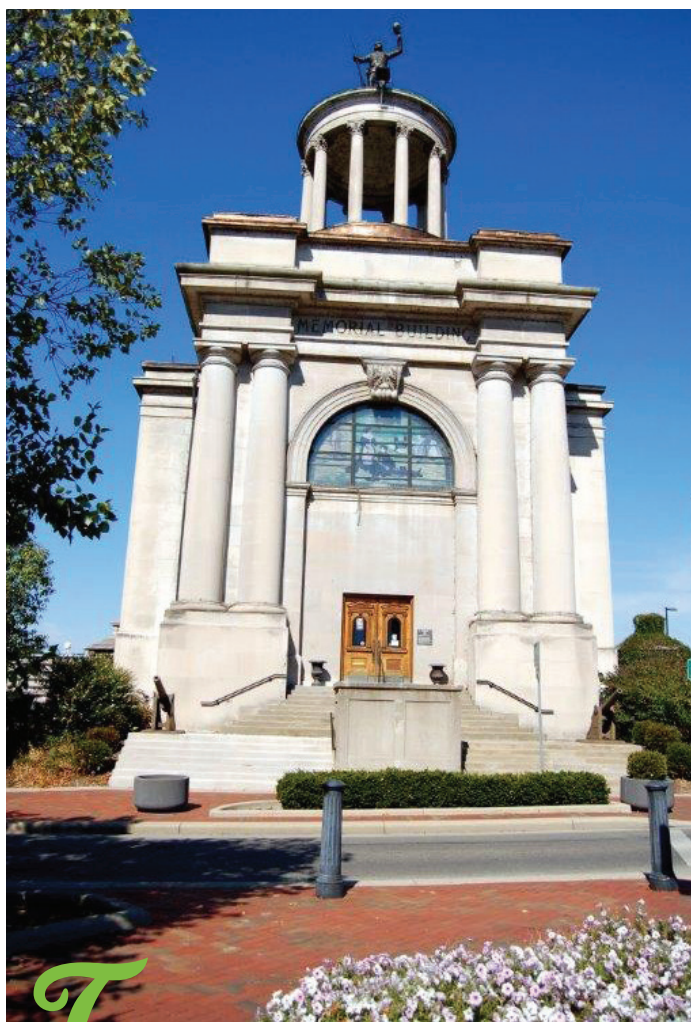
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Address correction requested

SOLDIERS, SAILORS AND PIONEERS MONUMENT



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hose driving, biking or walking by Hamilton’s iconic Soldiers, Sailors and Pioneers monument may have noticed work being done on it over the last several months. Workers have been busy repairing the 112-year-old county building that houses historic records and artifacts. The monument is being repaired with the help of a \$250,000 matching grant the Hamilton Community Foundation made to Butler County for the monument’s restoration.

* We hope you like the refreshed design of *Pathways to Giving*.

UP&COMING

grant opportunities

General grant applications

due May 1, September 1 and November 1, 2017
hamiltonfoundation.org

Women’s Fund grant applications

due May 19, 2017
hamiltonfoundation.org

INVESTMENT INSIGHTS

Please save the date for an informative and timely session with the Foundation’s investment experts that will give our donors insight into how we grow and care for Foundation assets, so we can grant with maximum impact!

Tuesday, May 23, 2016 at 5 p.m.

With Bill Hummel of the Fund Evaluation Group
Courtyard by Marriott

Call the Foundation, 513.863.1717 to reserve your spot