

Shelby County Community Foundation Charitable Grants Distribution

| <u>Grants Awarded by the SCCF Board of Directors</u> | <u>Amount</u> |
|---|--------------------|
| Center for Women and Families To purchase laptops, hardware and educational software for children | \$5,109 |
| Court Appointed Special Advocates To provide funding for the Advocate Support Program in Shelby County | \$7,500 |
| Dorman Preschool Center To purchase computers and renew online teaching tools for staff | \$8,000 |
| Hosparus Inc. To fund caregiver relief and bereavement counseling in Shelby County | \$2,500 |
| Legal Aid Society, Inc. To assist 50 low income residents of Shelby Co. with civil legal issues | \$2,000 |
| Loving Choice Pregnancy Resource Center, Inc. To purchase supplies, materials and teaching aids for parenting classes | \$2,000 |
| Operation Care, Inc. To replace a fire escape stairway at the Women and Children's shelter | \$5,193 |
| Serenity Center, Inc. To purchase materials and equipment to expand the medical program | \$10,000 |
| Shelby County Community Theatre Matching grant on a 1:1 basis up to \$10,000 for new gifts to the Friends of the Shelby County Community Theatre Endowment Fund. The SCCT has two endowment funds under SCCF. One preserves and grows assets given by SCCT and the other receives assets given by donors. | \$10,000 |
| <u>Grants Recommended by Advisory Committees</u> | |
| Scholarships University of Kentucky - Joshua R. Rice | \$500 |
| <u>Grants Recommended by SCCF Donors</u> | |
| Arts, Culture & Humanities (2 grants) | \$200 |
| General Education (3 grants) | \$400 |
| General Community & Environment (3 grants) | \$984 |
| Health & Human Services (9 grants) | \$2,175 |
| Religion (8 grants) | \$9,051 |
| Total 2013 Grants & Distributions | \$65,612 |
| Total Assets on Deposit (12/31/2013) | \$2,197,266 |

Lasting Ways to Benefit Our Community

You can establish an endowment fund that is customized to achieve just about any charitable purpose. Only a portion of the earnings from your endowment is used for grants, so your fund exists forever.

Unrestricted Fund (\$5,000 minimum)

This is the most responsive option, with the fund portion of the earnings used for grants to respond to changing community needs.

Donor Advised Fund (\$25,000 minimum)

This should be considered if you and your family would like to advise on your fund by suggesting specific grants.

Field of Interest Fund (\$25,000 minimum)

A portion of the earnings from this fund is used to support one or more broad areas you choose, such as health care, the elderly, the homeless, the arts, environment, education, etc..

Scholarship Fund (\$50,000 minimum)

This can be established for a general scholarship, a specific school, or field of study.

Designated Fund (\$25,000 minimum)

Specifies one or more charitable organizations to receive a portion of the earnings from your fund.

There are many simple and convenient ways to give to the Shelby County Community Foundation.

Cash Gift

This is the simplest and often most convenient way to give.

Securities Gift

Donations of appreciated stocks and bonds often offer a tax advantage. Additionally, gifts of closely held stock can be a tax-wise way to transfer ownership to others.

Real Estate

Gifts of appreciated real estate have many advantages. You could, for example, retain the right to live in a residence, but contribute the remainder interest to the Community Foundation for income and estate tax advantages.

Deferred Giving

Gifts can be made that give you and a loved one payment for life, like charitable gift annuities and charitable remainder funds.

Bequests

You can make a gift by bequest under a will, so that you achieve a lasting charitable purpose and reduce estate taxes.



Looking forward; giving back

Annual Report
December 31, 2013

Mission Statement:

To provide Shelby County residents a tax beneficial means to leave a personal legacy through donor advised charitable giving.

*It could be your legacy—give something back through the
Shelby County Community Foundation.*

www.shelbyccf.org

What is the Shelby County Community Foundation?

The Shelby County Community Foundation is an affiliate foundation of The Community Foundation of Louisville (CFL), a tax-exempt public charity that administers charitable funds created by Kentucky residents, businesses and organizations for the betterment of their communities. SCCF was organized in 1995 to provide the services of a community foundation to local residents and to begin building a collective charitable endowment for Shelby County.

The Shelby County Community Foundation oversees charitable funds managed by CFL. We do not receive or invest funds directly; that is the responsibility of CFL. Income from funds placed under our supervision by CFL is distributed in accordance with the criteria established by the fund donors.

Our mission also involves the encouragement of civic-minded Shelby County residents to add to our collective endowment by creating funds that support their charitable interests. You may open a charitable giving account to simplify your current giving with a gift of any amount. A permanent endowed fund may be created with a gift of \$25,000 or more. The fund may be established by a lump sum, periodic gifts to build the fund, or a bequest through a will. Donors may also create funds that pay income to them for life and later provide for the future of a favorite charity and the community.

We are fortunate to be an affiliate of CFL, which possesses the administrative, financial and legal expertise to manage its significant holdings of \$413 million. By investing your funds with the total assets of CFL, you can maximize your gift's impact because it is included in a larger investment pool. Because the administrative costs are shared with other donors, you free up more of your dollars for charitable giving in Shelby County.

If you would like to make a difference in Shelby County forever, I encourage you to consider the variety of services that are available to everyone through the Shelby County Community Foundation.

*Howard Griffith,
Chairman*

Funds of the Shelby County Community Foundation

Field of Interest Funds

Donors create field of interest funds to support a broad area of charitable interest or a geographic area for which they have a particular concern. The following funds have been established for the benefit of Shelby County as part of the Shelby Community Partnership Grants Fund.

Moses Ruben Fund for Shelby County (1990)
H. Augustus and Austine T. Barnett Fund (2003)
Mary Ellen Hackworth Fund (2005)

Donor Advised Funds

Donors create advised endowment funds to achieve maximum convenience and flexibility in their charitable giving. The donor, or persons selected by the donor, may recommend grants from investment income to support their charitable interests.

Shannon Family Fund (1996)
Created by Virginia T. and William L. Shannon to support the family's charitable interests in Shelby County.

**Brig. Gen. Ronald R. Van Stockum and
Susanne de Charette Van Stockum Fund (1998)**
Established to further the donors' philanthropic objectives.

Designated Funds

Donors create designated funds to provide permanent support for specific non-profit organizations of their choice.

Mary Ellen Hackworth Memorial Fund (2007)
Helps maintain the Clear Creek Family Activity Center.

Marguerite Henderson Memorial Fund (2007)
Supports Shelbyville/Shelby County Parks & Recreations.

Judge Harold and Susie Saunders Fund (2000)
Provides annual support for the Shelby County Library, Centenary United Methodist Church and First Baptist Church.

Scholarship Funds

Donors establish scholarship funds to help students achieve their educational goals. Donors may establish the criteria to be applied for selecting recipients.

Howard Hill Memorial Eagle Scout Scholarship Fund (2001)
Provides college scholarships to graduating high school seniors in Shelby County who are Boy Scouts, with preference to those who have attained the rank of Eagle Scout.

Louis B. Payne Scholarship Fund (1999)
Funded by the Falls City Pork Producers Association to honor its founder, and recognize outstanding students graduating from a public high school in Shelby, Henry or Oldham Counties.

Harriet Poynter Musician Scholarship Fund (1996)
Provides an annual scholarship to a graduating senior of Shelby County High School majoring in music.

Harriet Poynter Scholarship Fund (1996)
Awards an annual scholarship to an African-American graduating senior of Shelby County High School.

Brig. Gen. R. R. Van Stockum Marine Corps Scholarship Fund (1999)
Provides an annual scholarship to the outstanding senior member of the Shelby County High School Junior Marine ROTC Unit.

Susanne de Charette Van Stockum Scholarship Fund (1999)
Provides an annual scholarship to an outstanding graduating student of the French language at Shelby County High School who plans to study French in college.

Nonprofit Organization Funds

Charitable organizations may place endowments with the Community Foundation as a way to protect those funds for each organization's future. Donors may contribute to such funds at any time.

**Shelbyville/Shelby County Parks & Recreation
Marguerite Henderson Family Memorial Fund (2007)**

Bequests and Beneficiary Designations

Donors and their advisors work with the Community Foundation to plan future endowment funds with a bequest through a Will or trust. Donors may also name the Community Foundation as the beneficiary of all or a portion of a retirement plan or insurance policy.

Life Income and Deferred Funds

Life income funds are charitable gifts that provide income to the donor for the donor's designated beneficiaries for life, while also providing for the future of a favorite charity and the community. Donors receive significant tax benefits at the time of the gift and retain a lifetime interest in the income from the fund.

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For more information, visit our website at www.shelbyccf.org
