

## HOW TO GIVE

We make philanthropy easy, and for those establishing an endowment, more affordable than a trust company or private foundation. The smallest of gifts may be added to any fund. For larger gifts, cash is not the only option. Our staff is knowledgeable about gifts of insurance, real estate, charitable remainder trusts, and annuities. Simply by naming the Foundation in your will, you can become a member of our *Legacy Society*.



Everyone can leave a *Legacy*.

## MISSION STATEMENT

The mission of the Putnam County Community Foundation is to partner with those who give to enrich life and strengthen community for this and for future generations.

## FOUNDATION FACTS

12-31-09

- Founded: 1985
- Active Funds: 199
- Donors Served: 4,168
- 2009 Grants & Scholarships: \$746,763
- Cumulative Contributions: \$18.7 million
- Cumulative Grants & Scholarships: \$7.0 million
- **Total Assets:** \$18.8 million

## PUTNAM COUNTY COMMUNITY FOUNDATION

**M. Elaine Peck**  
*Executive Director*

**Grace Hudson**  
*Financial Services Officer*

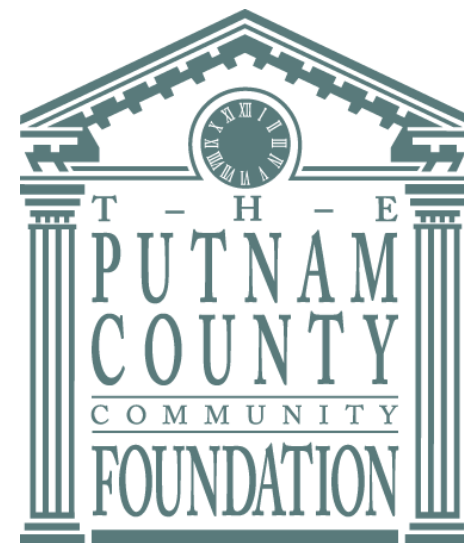
**Nelda Shoemaker**  
*Executive Assistant*

**Eric Wolfe**  
*Community Development Director*

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# PUTNAM COUNTY COMMUNITY FOUNDATION

# YOUR COMMUNITY FOUNDATION



*Enriching Life  
Strengthening Community*

# Your Choice... Your Passion... Your Legacy... Your **COMMUNITY FOUNDATION**

## WHO WE ARE

The Community Foundation is a non-profit agency, governed by a representative volunteer board of directors, which **partners** with those who give to enrich and strengthen our community for this and future generations. We are not in competition with other non-profit agencies. We help agencies increase their donor base and financial stability and educate people about philanthropy, charities, and community projects.

## THE ENDOWMENT

The Foundation's endowment, more than \$20 million in assets, is a pool of more than 174 individual funds established by donors. The endowment is permanent; granting is based on earnings and market growth. We are good stewards of our endowment and receive professional investment advice from Oxford Financial Group. As a result, our investment returns are much higher than average for an endowment of our size. Investment returns since inception have averaged nearly 9% annually.



YOUTH PHILANTHROPY COMMITTEE 2008

## TYPES OF FUNDS

Our funds vary greatly by purpose and by the amount of control a donor (or his designee) wishes to have over granting. In all cases, we ensure that granting dollars are spent according to donor wishes and that charities make good use of granted funds.

- ◆ **Donor-Advised fund** Each year, the donor may recommend charities to receive grants from the fund.
- ◆ **Donor-Advised, Field of Interest fund** Same as above, but grants are targeted to specific areas of interest.
- ◆ **Scholarship funds** These funds are created by an individual or a group, which sets criteria for scholarship selection. Selection of scholars may be done by the donor(s) or by the Foundation's scholarship committee.
- ◆ **Agency, Church and Cemetery funds** Established by a donor or group of donors, all grants are awarded to the named organization.
- ◆ **Field of Interest fund** Established by one or more donors, grants are made within a specific area, such as education or helping the homeless. Recipients are designated by Foundation Board of Directors.
- ◆ **Unrestricted fund (Community Grants Endowment)** Donors empower the Board of Directors to meet the ever-changing needs of our community
- ◆ **Foundation's Administrative Endowment** Donors to these funds support the services provided by the Foundation.
- ◆ **Pass-through fund** Donors to these funds intend that all contributions be granted. Their purposes may be to support a specific project or any charitable activity or agency.

## FUND ADMINISTRATION

- ◆ Minimum fund size is \$12,000 (within 3 years of establishment).
- ◆ Maximum fees for Community Foundation administration and investment management is 1 % (based on \$12,000 minimum).
- ◆ Each endowed fund may grant 4.5 % of its value annually.

## SERVICES

The Community Foundation has helped donors accomplish many things in Putnam County.

For example:

- ◆ Provide recreational facilities, such as the Skate Park, Emerald Palace, People Pathways, Roachdale Community Garden and Russellville Community Center, to name a few.
- ◆ Provide assistance for the hungry and homeless, animal welfare, and economic development.
- ◆ Provide defibrillators for first responders in ALL parts of the county.
- ◆ Award more than **\$1 million** in scholarships.



ROACHDALE COMMUNITY GARDEN 2006