



The Joy of Giving

Marshall Community Foundation

Winter ❄ 2008

2008
...improving lives
...improving community

The Foundation is thankful. Despite the economic difficulties and the many challenges facing our community, generous donors continue to support those in need. This giving spirit has enabled the Foundation to continue its mission during the past fiscal year (Oct. 2007—Sept. 2008). Gifts exceeded \$347,000.00; grants and scholarships exceeded \$310,000.00; assets remained strong at \$9.7 million.

Additionally, 8 new funds were added to our “family of funds” now numbering 120. We are proud to welcome the *Coury and Kesselring Natural Resource Scholarship*, *Robert and Elaine Lund Memorial Fund*, *Elizabeth McAfee Memorial Fund*, *Karen M. Nickels Memorial Fund*, *Karen M. Nickels Equestrian Fund*, and the *Sexual Assault Prevention and Recovery Fund* into our endowed funds and the *GIFT (Brooks Fountain) Fund* and *Success (MPS) Fund* into our non-endowed funds.

Our report on the Foundation would be incomplete without referencing the Youth Advisory Council (YAC), comprised of 25 young philanthropist from the Marshall High School. The Council is committed to community service projects. This is achieved through awarding grants and numerous volunteer activities. The YAC President also joins the Foundation’s Board of Trustees with full voting privileges at the monthly meetings. This partnership with the youth certainly brings a fresh voice and perspective to the decision making process.

In closing, we are thankful to everyone who has recognized the benefit of giving to the Marshall Community Foundation. Our goal is to give you, the donors, the opportunity to make an impact on future generations. Leaving a legacy is why we exist.

So please...continue to support your Marshall Community Foundation. Together we have accomplished so much, together we can accomplish so much more.

For good. For ever.

Foundation Grants exceed \$130,000.00

Listed below are many of the grants awarded to area Non-Profits in 2008. **Again, your dollars are hard at work— making a big difference. Thank you!**

More information about these grants and Donor Advised/Designated Funds grants is available by contacting the Foundation Office.



MARSHALL MUSIC BOOSTERS—Assist with purchase of music stands, chairs, equipment and pianos	\$20,000
MARSHALL MAIN STREET/DDA—Alley Project	\$15,000
MARSHALL PUBLIC SCHOOLS—Music equipment maintenance for MHS and MMS	\$10,000
BATTE CREEK CHAMBER OF COMMERCE—Business development training	\$10,000
MUSIC CENTER OF SOUTH CENTRAL MICHIGAN—Marshall Music Annex	\$9,000
FRANKE CENTER FOR THE ARTS—Marketing/support materials	\$8,352
MAPLE GROVE CHURCH/FAIRGROUNDS—Restoration of storm shelter/lower level	\$8,250
MARSHALL AREA GARDEN CLUB—Assist with planting 50 Elm trees	\$5,000
MARSHALL AREA CHAMBER OF COMMERCE—Branding/promotional materials	\$5,000
ART IN THE EYE—Midwest Sculpture Initiative	\$4,500
FOOD BANK OF SOUTH CENTRAL MICHIGAN—Assist with the purchase of forklift equipment	\$3,000
MARSHALL AMERICAN LEGION—Veterans WWII Memorial visit	\$3,000
MARSHALL FIRE DEPARTMENT—Trailer fire prevention safety house	\$3,000
MARSHALL HIGH SCHOOL ATHLETIC DEPARTMENT—Assist with purchase of Red Hawk banners	\$2,964
CALHOUN COUNTY SHERIFF'S DEPARTMENT—Purchase of AED Defibrillators	\$2,890
ARTS AND INDUSTRY COUNCIL—Website development	\$2,800
FOUNTAIN CLINIC—Telephone system	\$2,500
HAVEN OF REST—Office/support materials	\$1,250
BOY SCOUT TROOP 337—Assistance with purchase of camping equipment trailer	\$1,250
SOUTHWEST COMMUNITY FOUNDATION ALLIANCE—Training workshop	\$1,000
MARSHALL AREA CHAMBER OF COMMERCE—Small business training	\$750
GIRLS SCOUT TROOP 202—"Historical Women in History" trip	\$750
AREA LAW ENFORCEMENT UNDERWATER RECOVERY TEAM (ALURT)—Office equipment	\$750
CALHOUN COUNTY FIRE PREVENTION WEEK PROGRAM—Support County fire prevention program	\$750
MARSHALL COMMUNITY BAND—Stuart's Landing Band Shell security lighting system	\$600
CALHOUN COUNTY RELAY FOR LIFE—Survivor Dinner	\$500
MARSHALL ECONOMIC DEVELOPMENT—Manufacturers Appreciation luncheon meeting	\$500
BOY SCOUT TROOP 388—Purchase gear for new troop	\$500
CITY OF MARSHALL RECREATION DEPARTMENT—Outdoor Theater Program	\$500
SOUTHWEST COMMUNITY FOUNDATION ALLIANCE—Marketing project	\$500
SUCCESS FUND (MPS)—Promotional support	\$500
COUNCIL OF MICHIGAN FOUNDATIONS—Foundation marketing materials	\$300
MARSHALL HISTORICAL SOCIETY—Community Concert	\$200
SOUTHWEST COMMUNITY FOUNDATION ALLIANCE—Administrative costs	\$200
MARSHALL TEACHERS ASSOCIATION—New teacher orientation materials	\$150
MARSHALL ALTERNATIVE HIGH SCHOOL—Facilitator training costs	\$100

Dear Friends:

Please join us as a Member of the Pillar Society...

Leaving a Legacy

For several years the Marshall Community Foundation has been aware that very generous people in our community have made arrangements for a future gift to the Community Foundation through a bequest in their will or other types of planned gifts.

The Foundation has wanted to find a way to recognize and thank these thoughtful people. To meet this need, the Foundation created the **Pillar Society**. If you have not already joined, we would like to invite you to become a member of this honored group.

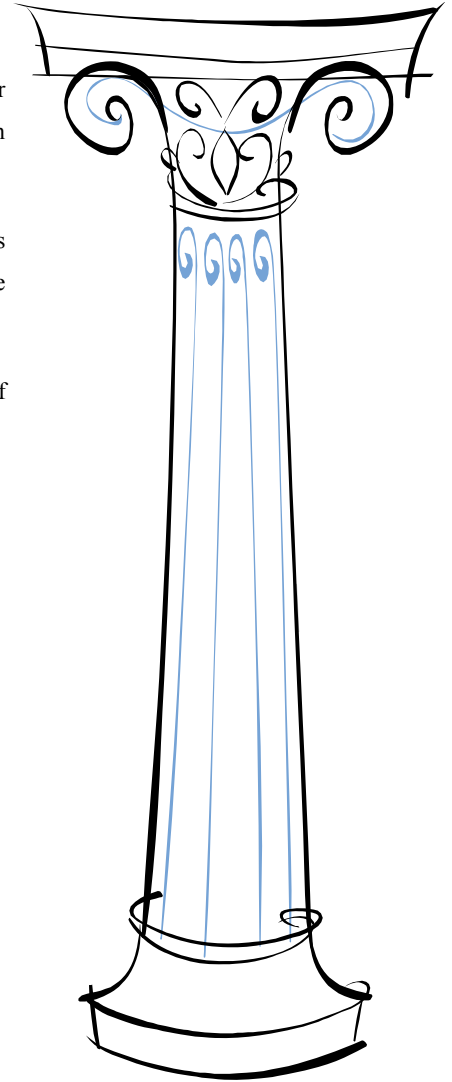
Members of the Pillar Society will be invited to a special event in 2009. Please let us know soon if you will be joining us, so that we can include you on the invitation list.

If you have questions, please give me a call at the Foundation office at 269.781.2273.

Sincerely,

Sherry Anderson,

Foundation Director



Here's how to join the Pillar Society—just two steps:

1. **Arrange for your estate to leave a gift to the Foundation.** Common ways to do this are:

- As a beneficiary of a bequest through your Will or Trust
- As a beneficiary in an IRA or 401K Retirement Plan
- As a beneficiary of owner of a Life Insurance Policy
- As a beneficiary of a Charitable Gift Annuity, Charitable Remainder Trust, or other planned gift

2. **Inform the Marshall Community Foundation that you have made the necessary arrangements.** Return this form in the envelope provided. to give us permission to include your name in future listings of the **Pillar Society**.

- I/We have made a provision for the Foundation in my/our estate plans and wish to be included in the **Pillar Society**. The Foundation may list the following name(s) as members of the **Pillar Society**.

(Please print your name(s) as you wish to be listed)

- I/We have made a provision for a gift, but prefer not to be listed as members of the **Pillar Society**.

- I/We have not yet planned for a future gift, but would like more information on how to leave a legacy through our Will or other planned giving arrangement.

Name

Date

Address

Phone Number

MARSHALL COMMUNITY FOUNDATION

126 West Michigan Avenue, Suite 202

Marshall, MI 49068

Tel 269.781.2273 * fax 269.781.9747

Email info@marshallcf.org

Visit - www.marshallcf.org

Browse our website. It contains great information about the Foundation such as, fund descriptions, grant requirements or download our scholarship and grant applications for your convenience. On-line giving coming soon in 2009.

Volunteers Behind the Scenes

Countless volunteers assist at the Foundation throughout the year. Whether they assist with special projects or serve on a committee, such as Scholarship, Finance, Grant Review, Nominating, Marketing, our volunteers make a world of difference.

We thank you!

2009

Deadlines and Dates

Jan. 1: Grant Application Due

Feb. 13: Volunteer Reception

March 1: Scholarships Due– Graduating Seniors

April 1: Grant Application Due
Scholarships Due– Enrichment

April 30: Annual Donor Appreciation Event

May 1: Scholarships Due– Non Traditional
Vyda Mumby Application Due

July 1: Grant Application Due

Oct. 1: Grant Application Due
Scholarships Due– Enrichment

Make a TAX-FREE Gift from your IRA... what an opportunity

The Pension Protection Act of 2006 included a charitable incentive allowing American Seniors to make a gift of a lifetime – by allowing a contribution from their IRA proceeds to a charity like the Marshall Community Foundation, **tax free**.

There are certain requirements, including:

- The gift (maximum: \$100,000 per year) must be an outright gift, not a planned or deferred gift.
- You must be at least 70 1/2 years of age at the date of the gift
- The gift must be from your IRA, as opposed to another type of pension plan.
- The amount you give must otherwise be taxable if distributed directly to you.
- The gift must be made directly to a qualifying public charity, such as, the Marshall Community Foundation.
- Gifts to donor advised funds, supporting organizations, or private foundations are not eligible.
- This special gift does not affect the deductibility of other contributions.

Your gift can be placed into any of the qualifying funds administered by the Foundation. We are confident that we hold a fund that meets your charitable wishes.

To find out if the Pension Protection Act can benefit you, please contact your personal financial advisor. For further guidance contact the Foundation staff at 269.781.2273.

Board and staff

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