

COMING TOGETHER TO HELP WELD COUNTY TORNADO VICTIMS

On May 22, 2008, an EF3 tornado ripped through Weld County affecting the lives of Gilcrest, Platteville, Greeley and Windsor residents. The Windsor Community Foundation Fund and the Tribune Community Crisis Fund at the Community Foundation Serving Greeley and Weld County began accepting donations immediately to help those affected by the storm.

The outpouring of support has been truly amazing. Judy Knapp, President of the Community Foundation Serving Greeley and Weld County was elated at the response, indicating, "I continue to be uplifted by the generous spirit of the local and regional communities. These charitable contributions are already making a difference in the lives of those who need our support the most."



Luke Boyd and Chris Bowman from Noodles & Co. presenting a donation to Judy Knapp and Randy Bangert of the Tribune Community Crisis Fund for Tornado Relief.

Brian Lessman, Chairman of the Windsor Community Foundation Fund states, "The cooperation of these Foundations, combined with the resolute desire on the part of our community to rebuild our neighborhoods and our relationships is a stunning example of the gratitude of others, the friendship of our neighbors, and our commitment to one another. We truly have the opportunity to give thanks in the face of tragic events." Together, through the generous contributions of individuals, businesses, and community organizations, the combined foundations received donations from all over the country totaling more than \$350,000.

Donations of \$5,000 or more to date include:

Ptarmigan Country Club Members
Noble Energy
Petroleum Development Corporation
Anadarko Petroleum Corporation
Bank of the West
Daniels Fund
Tointon Family Foundation
Noodles & Co.
Flood and Peterson Ins. Company
The Greeley Tribune/Windsor Now!
Kodak
Powertech USA
RR Donnelly
Yancey's

The two Foundations joined together in the application, review and distribution process so that a single application served both funds.

The money raised is being distributed in the form of one-time grants to support unmet basic and immediate needs such as food, clothing, shelter, utilities, repairs, transportation, medical assistance, and other needs as determined to be critical need areas. The first two distributions totaled \$163,000.



Elsa Mandez with the van she was able to purchase with funds from the Tribune Community Crisis Fund for Tornado Relief.

Both the Windsor Community Foundation Fund and the Tribune Crisis Fund are component funds at the Community Foundation Serving Greeley and Weld County. If you would like more information, please call (970) 304-9970.

Upcoming Events

Opportunities in Estate Planning for CPA's, Attorneys and Trust Officers—Thursday, July 17 and Friday, July 18 from 8:30 a.m. — 5:00 p.m. at the Poudre Learning Center. Presented by Peter B. Scott, J.D., LLM (Tax), Bendelow Law Firm, Loveland and C. Jan Lord, J.D., Law Office of C. Jan Lord, Berthoud. CLE, CPE and ICB continuing CTFA education credits are available. The fee to attend is \$95 and includes course materials, continental breakfast, lunch and refreshments. To register, please call Teresa at the Bendelow Law Firm by **July 11, 2008** to reserve your seat; (970) 663-5206.

Talking to your clients about charitable giving—Professional Advisors Workshop—Friday, July 25 from 11:30 a.m. to 1:00 p.m. at the Windsor Recreation Center. Presented by Tim Belber, J.D. and sponsored by Lincoln Financial Advisors. There is no cost to attend and lunch will be provided. To register, please call (970) 304-9970.

First Annual Sam Chuenchit Soccer Scholarship Fund and Northern Colorado Soccer Club Golf Tournament—Friday, August 8, at 8:00 a.m. at Highland Hills Golf Course. Corporate and team sponsorships available. For more information, contact Sean Lacefield at (970) 518-9645.

Daily Doses of Hope

2008 Community Foundation Scholarship Winners

We would like to congratulate the 2008-2009 Community Foundation Scholarship winners. Awards were presented at our annual scholarship reception on May 13, 2008 at Island Grove Events Center. The reception was sponsored by First National Bank. Over 200 donors, students and families, area school representatives and Community Foundation directors and committee members attended the event where approximately \$170,000 was awarded to 75 students.



Arts Alive!

Erin Carleton, University H.S.
Alessandra Powell, University of N. Colorado

Judd K. Fulton Memorial

Tim Saucedo, Northridge H.S.
Joseph Sinnwell, Greeley Central H.S.
Sarah Stringer, Northridge H.S.
Josh Breske, Black Hills State University
Sid Colglazier, Black Hills State University

Mildred Hansen

Nicole Aubol, Greeley West H.S.
Jordan Brumley, Northridge H.S.
Benjamin Buhler, University H.S.
Kaitlin Calhoun, University H.S.
Roman Castorena-Hernandez,
Greeley Central H.S.
Jamie Cozad, Greeley Central H.S.
Brittany Fosher, Northridge H.S.
Kathryn Gerwig, Greeley West H.S.
Gerard Heise, Greeley West H.S.
Rachel Herbert, Northridge H.S.
Brittini Hernandez, University H.S.
Lindsey Howell, Northridge H.S.
Adrienne Larson, Greeley West H.S.
Aimee Niemann, Greeley Central H.S.
Amelia Newport, Greeley Central H.S.
Andrea Orange, Greeley Central H.S.
Elizabeth Overturf, Greeley Central H.S.
Bryana Pardo, Greeley West H.S.
Caitlin Polasek, Greeley West H.S.
Landon Shaw, Greeley West H.S.
Andrew Steitz, Greeley Central H.S.
Lexi Ververs, Greeley Central H.S.

Lynne and Gladys Hopkins Family

Charlotte Bengtson, Greeley Central H.S.
William Dillon, University H.S.
Adam Hayes, University H.S.
Jesse Simpson, Fort Lupton H.S.
Vance Smith, Valley H.S.

Leoma Hunter

Kammi Adams, Pawnee Schools
Max Dillon, Fort Lupton H.S.
Sydnie Dillon, Fort Lupton H.S.
Nicole Dudley, Northridge H.S.
Luke Engelbert, Roosevelt H.S.
Adam Figueroa, Fort Lupton H.S.
Kolten Jelden, Eaton H.S.
Kaitlyn Jerome, Greeley Central H.S.
Katie Ledall, Eaton H.S.
Isidro Luna, Greeley Central H.S.
Mathew Mathiason, Highland H.S.
Tiphonie Medbery, Frontier Academy
Arika Mondt, Briggsdale H.S.
Cydney Naill, Greeley West H.S.
Jessica Pelz, Eaton H.S.
Brittany Robinson, Greeley West H.S.
Katie Samples, Windsor H.S.
Kayla Sible, Valley H.S.
Shelly Specht, Greeley Central H.S.
Andrea Stockert, Northridge H.S.
Felipe Vieyra, Greeley Central H.S.
Daniel White, Windsor H.S.
Tiffany Whitney, Greeley West H.S.
Melissa Winder, University H.S.

Kristopher G. Mansfield Memorial

Matthew Hoffman, Windsor H.S.

Carl Mason Family

Sydnie Dillon, Fort Lupton H.S.

Helen McCandless

Troy Kimmel, Colorado State University

Peschel Memorial

Kristah Frank, Valley H.S.

Dr. John A. & Patricia C. Rosales Memorial

Daniel Bristoll, University H.S.

SasonsFund

Brittany Booten, Wasson H.S.
Kendra Gerk, Greeley West H.S.
Lauren Keiser, Greeley Central H.S.

Lynn Shipps

Lucas Lyons, Aims Community College

Marvin Stonemets

Samantha Maxwell, Eaton H.S.

Weld County Builders

Jesse Barnett, Greeley Central H.S.
Andrew Sjoberg, University H.S.

M.C. Widmaier Family Nursing

Jessica Austin, Eaton H.S.

Winograd Family

Karine Hoff, Greeley Central H.S.
Ali Jaimes, Northridge H.S.
Chun Li, Greeley West H.S.

Woolf

Aimee Niemann, Greeley Central H.S.
Benjamin Veilleux, Frontier Academy

If you would like information about scholarships at the Community Foundation, please contact Lauren Weber at (970) 304-9970 or lauren@cfsgwc.org.

Help Your Clients Give Generously—and Retire Comfortably

Professional Advisors Corner Presented by Bank of Colorado

Many of the nation's 78 million baby boomers have reached the perfect time in their lives to develop a charitable giving plan. They may be preparing for retirement, but their flower-child roots are still firmly committed to improving their communities through donations and volunteer work. After all, using philanthropy for positive goals appeals to boomers.

A Desire to Give Back

The same idealism that inspired their youthful civic engagement now is leading boomers to consider giving to causes and organizations that they believe in. As a result, financial advisors will find that these clients want to explore in detail their philanthropic desires, goals, and options.

Savvy boomers recognize the wisdom and benefits of integrating philanthropy into a financial strategy. Handled correctly, generosity can support good causes and provide donors with retirement income and tax deductions. So it's easy to see why members of the We generation are ready and eager to discuss this subject with their financial advisors.

Balancing Philanthropy and Retirement

Harmonizing giving and retirement planning is a wise move. The two can efficiently complement each other. But doing so takes careful planning. Consulting with a charitable advisor from a local community foundation during the process will provide a helpful, experienced hand in creating the right strategy for your client.

Given boomers' experiences and attitudes, planners should be prepared for questions about what kind of options are available for getting involved in

charitable giving. What clients may not know, and what community foundations can help to identify, is that their assets often shape the kind of donations that will be made. For example, a client with significant stock holdings will need a different philanthropic strategy than one with many properties or a surplus of cash. Regardless of their overall net worth, your clients will be pleasantly surprised to discover that they can give substantial help to charities and at the same time enjoy a secure, comfortable retirement.

"People assume you have to be really wealthy to give or establish a fund with a community foundation. You don't need that much money. At our community foundation, you can start an acorn fund with as little as \$2,000," says Judy Knapp, President of the Community Foundation.

As philanthropic discussions develop, it's important to again keep in mind that giving and retirement are closely linked and, if carefully blended, can help the donor as well as a charity. This is especially true for potential donors concerned about having sufficient retirement income. Many options exist to address this issue. One of the most common financial vehicles for doing so is a charitable gift annuity.

Tailored Giving Plans

A charitable gift annuity involves a contract between a donor and a charity. With it, the donor transfers cash or property to the charity in exchange for a lifetime stream of annual income at a guaranteed fixed rate. When the donor dies, the charity keeps the donation. Charitable gift annuities offer donors certain tax advantages in addition to income.

Not only does drafting a giving plan make sense, but so does including a charitable advisor in the planning process. Local community foundations can provide a wide range of information and knowledge.

"Financial advisors can talk to us about giving vehicles. We can suggest ones that make sense for clients and their special situations," Knapp said. "We also have software programs where we can do calculations for clients working with their assets, age, and other information. This can illustrate what can be done with their money."

As financial advisors work with boomers on a giving plan, they should recognize that they are extremely serious about philanthropy. They'll enjoy discussing the topic and learning about options, techniques, and tools that make their donations possible. In short, they'll be deeply engaged.

"When it comes to producing a giving plan, donors probably are more involved than with any other type of financial planning," Knapp said. "The reason is simple. This is their legacy. It's what gives them meaning in life."

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Thank you to Windsor Community Foundation Board member, Tom Prenger, President of Bank of Colorado for contributing this article and sponsoring this issue.

 **Bank of Colorado**

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GRANTS IN ACTION

The Community Foundation announced the 93rd Distribution of the Littler Youth Fund. Awards totaled \$22,812 to various programs to support youth throughout Greeley and Weld County. The following organizations received funding this quarter:

- Boys and Girls Clubs of Weld County—Computer equipment upgrades
- City of Greeley Museums—Greeley History Museum Family Educational Playspace
- Colorado Blues Society—BlueSkool at the Greeley Blues Festival
- Eaton Middle School—Career Day
- Northridge High School Environment Club—Elementary Environment Day
- Right to Read of Weld County, Inc.—ESL Pre-school Program



Platteville Elementary School: Computers on Wheels (COW) funded by the Littler Youth Fund.



Please visit our website at www.cfsgwc.org for upcoming grant deadlines or for more information, contact us at (970) 304-9970.



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LITTLER YOUTH FUND STUDENT MEMBERS SHINE



CJ Allison

In addition to the community members that serve on the Community Foundation Littler Youth Fund Distribution Committee, two student members bring a unique insight to youth grantmaking. CJ Allison, a senior at Northridge High School and Sarah Sauter, a recent graduate from Eaton High School provide a youthful perspective to the difficult task of reviewing applications and making recommendations on how to distribute funds to youth programs throughout Weld County.

The role of the Littler Youth Fund student members is to make grant recommendations, based on local youth needs and priorities, and to advocate for youth as resources to the community. Each member is assigned a grant proposal to research and the remainder of the proposals to review. Serving on the Distribution Committee provides a unique opportunity for high school students to improve the quality of life in their communities through informed grant making.



Sarah Sauter

Both CJ and Sarah are active members of their high schools and communities. CJ recently completed his senior project bringing nearly 1,000 elementary school students to the Poudre Learning Center to teach them about the environment and conservation. Sarah was the President of National Honor Society and was accepted into the Air Force Academy where she will also be involved with the swimming program. The Littler Youth Fund, established in 1971 by Hubert and Mary Painter Littler, has given over \$2 million to area agencies, youth programs and organizations.

The Community Foundation Serving Greeley and Weld County

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