



Fort Atkinson Community Foundation 2012-13 Annual Report

Celebrating 40 Years of Giving

A gift today, a legacy tomorrow

Enclosed is my donation of \$ _____

Name: _____

Address: _____

Fund/Note: _____

Send to:
Fort Atkinson Community Foundation
244 N. Main St.
Fort Atkinson, WI 53538

Credit card donations can be made on our
secure website, www.fortfoundation.org.



*Renovation and Expansion of the
Dwight Foster Public Library*

Dear Community,

The Board of Directors of the Fort Atkinson Community Foundation is pleased to present its 2012-13 fiscal year financial report.

Thanks to the ongoing generosity of our community, last year the foundation was able to disburse \$963,836 in support of our mission to enhance the quality of life in Fort Atkinson. While the two largest gifts were 'bricks and mortar' payments on our commitment to the Dwight Foster Public Library (\$375,000) and Rainbow Hospice (\$100,000), last year also featured a number of smaller grants given to local nonprofits such as the Community Dental Clinic, Family Promise, Jefferson County Literacy Council, and the local United Way chapter, to assist them with their work in strengthening the fabric of our social services network.

The foundation also worked to improve our community one student at a time with our remarkable scholarship program. During the year we were pleased to fund 66 scholarships held by 57 undergraduate students, and another 22 scholarships held by 19 graduate students – all from the Fort Atkinson area. The total amount paid on these 88 scholarships was \$199,522.



*Safe passage for
Middle School students*

We were able to make these investments in the community and in our young people thanks to the many families who continue to invest in the future of Fort Atkinson by giving to the Community Foundation. Last year



*Our 2013 Buell Merit Scholarship recipients—
thanks to a generous fund established by
Walter and Louise Buell*

we received 457 separate donations, ranging from gifts of \$3 to \$63,000, for a total contribution of \$502,882.

All gifts received were spent or invested as directed by our donors. One of the great benefits of the foundation is that we can fulfill our donor's charitable wishes well into the future when they are no longer here to do it themselves. I think Ernie Pope would be very pleased to see his fund supporting the prizes for the art show at Cygnus, and Mary Hoard would be thrilled to see what gifts from her fund have done for the library. This is the foundation at its best.

Thanks to our donors, the Community Foundation is able to make special things happen here in Fort Atkinson. Working together, we make a difference.

Sincerely,
Ronald J. Vogel, chairman

"The older I get, the more blown away I am by the unique support given to Fort graduates and residents to further their education."

Mariah Erdman, Baruch College
MBA student and recipient
of a Walter & Louise Buell
Graduate Scholarship

Where gifts today build better tomorrows

www.fortfoundation.org

YOUR COMMUNITY FOUNDATION

The Fort Atkinson Community Foundation began in 1973 with a gift of \$25,000 from an anonymous local citizen who wanted the money to benefit a future Fort Atkinson community, whatever that community might look like and need. Inspired by this unique gift, community-minded citizens set up our foundation to be able to accept similar gifts intended to enhance the quality of life in Fort Atkinson.

Carefully managed by a volunteer Board of Directors, the foundation continues to benefit from the thoughtful generosity of the community it serves.



Digital x-ray plates for the Community Dental Clinic

BOARD OF DIRECTORS

Ronald J. Vogel, chairman
Elizabeth McLaughlin, vice-chairman
W. Phil Niemeyer
Dean Brown
Christopher Rogers
James J. Nelson, past chairman

Annual Financial Report, Year Ending June 30, 2013

[figures rounded to nearest dollar]

Assets as of June 30, 2013

| | | | |
|---------------------------------|------------|------------|--|
| General Account: | | 3,921,473 | |
| Scholarships: | | | |
| AAUW Second Chance | 153,189 | | |
| Band Booster | 7,292 | | |
| Batterman Family Fnd. | 21,383 | | |
| Walter & Louise Buell | 1,532,746 | | |
| Orrin & Margaret Bull | 4,718 | | |
| Jason Dahnert Memorial | 31,595 | | |
| James/Therese Fitzpatrick | 12,114 | | |
| Ben & Ada Hake Agriculture | 126,377 | | |
| Jerome Hake Engineering | 101,038 | | |
| Gene Halker Memorial | 9,031 | | |
| Eileen Harrison Education | 48,182 | | |
| Jones Dairy Farm Tech Ed | 52,721 | | |
| Robert & Judith Knapp | 42,550 | | |
| Knox/AAUW | 199,199 | | |
| James & Frances Luther | 39,663 | | |
| Isabelle Mathews Education | 45,680 | | |
| Pay It Forward | 24,279 | | |
| Pharmacy | 4,399 | | |
| Rose Inspire-a-Dream | 79,881 | | |
| Dr. James Russell | 100,165 | | |
| Ralph & Clara Rutledge | 168,980 | | |
| Juanita Schreiner | 328,971 | | |
| Maurice & Clara Staller | 113,312 | | |
| Thrift Shop & Jean Reich | 33,475 | | |
| Sydney Weidemann | 106,538 | | |
| Wiederhoeft Legacy | 55,399 | 3,442,878 | |
| Field of Interest Funds: | | | |
| Bark River Nature Park | 3,263 | | |
| Beautification Fund | 283,526 | | |
| Boys & Girls Club Inv. | 25,738 | | |
| Doris Highsmith | 165,449 | | |
| Mary C. Hoard | 10,215,210 | | |
| Elizabeth Jones Chisholm | 32,777 | | |
| Bertha & Marilyn Kuhl | 2,053,417 | | |
| Carol Liddle | 57,992 | | |
| Lorine Niedecker | 4,675 | | |
| Opportunities, Inc. | 1,362 | | |
| Pope Memorial Art | 64,976 | | |
| Senior Citizens Center | 45,045 | | |
| Phyllis & Bob Zeiman | 290,303 | 13,243,733 | |
| Donor-Advised Funds | | | |
| Gordon F. Day Family | 21,320 | | |
| Kerschensteiner Family | 397,088 | | |
| Negus Family | 98,579 | | |
| Schafer Family | 197,335 | | |
| Vance Family | 31,150 | 745,472 | |
| Pass-through Funds | | | |
| Barrie School Sch. | 3,049 | | |
| Boys & Girls Club | 15,046 | | |
| Boys & Girls Club Rose | 1,076 | | |
| Dwight Foster Library | 46,566 | | |
| Eagle Scout/Gold Award | 1,500 | | |
| Fire Department | 126 | | |
| Friends of Haumerson's | 12,825 | | |
| Friends of McCoy Park | 600 | | |
| Karrels Computer Science | 24,009 | | |
| Luther School Sch. | 1,982 | | |

| | | | |
|--|-----------|------------|---------------------|
| Jake Meinert Memorial | 5,234 | | |
| Performing Arts | 242 | | |
| Project Lead | 44,454 | | |
| Purdy School Sch. | 7,911 | | |
| Rock River Heritage | 37,083 | | |
| Rockwell School Sch. | 2,501 | | |
| Don Schink Memorial | 2,793 | | |
| Theater Project | 1,578 | | |
| Water Tower | 575 | 209,150 | |
| Total Fund Balance, June 30, 2013 | | | \$21,562,705 |
| Charitable Disbursements: | | | |
| General Account: | | 155,931 | |
| Scholarships & Special Funds | | | |
| AAUW Second Chance | 2,500 | | |
| Batterman Family Fnd. | 58,500 | | |
| Boys & Girls Club | 67,587 | | |
| Boys & Girls Club Rose Mem. | 1,181 | | |
| Buell Scholarship | 73,472 | | |
| Orrin & Margaret Bull | 500 | | |
| Jason Dahnert Memorial | 1,750 | | |
| Dwight Foster Library | 112,630 | | |
| Ben & Ada Hake Agriculture | 4,000 | | |
| Jerome Hake Engineering | 4,000 | | |
| Gene Halker Memorial | 400 | | |
| Eileen Harrison Education | 2,000 | | |
| Doris Highsmith | 17,000 | | |
| Mary C. Hoard | 380,000 | | |
| Karrels Computer Science | 2,000 | | |
| Robert & Judith Knapp | 2,500 | | |
| Knox/AAUW | 8,600 | | |
| James & Frances Luther | 1,700 | | |
| Isabelle Mathews Education | 4,000 | | |
| Negus Family | 5,000 | | |
| Pay It Forward | 500 | | |
| Pope Memorial Art | 1,050 | | |
| Project Lead | 70 | | |
| Purdy School Sch. | 1,112 | | |
| Rock River Heritage | 18,700 | | |
| Dr. James Russell | 4,437 | | |
| Ralph & Clara Rutledge | 7,500 | | |
| Don Schink Memorial | 5,166 | | |
| Juanita Schreiner | 10,300 | | |
| Maurice & Clara Staller | 3,000 | | |
| Thrift Shop & Jean Reich | 2,000 | | |
| Sydney Weidemann | 3,750 | | |
| Ardell Wiederhoeft Legacy | 1,000 | 807,905 | |
| Total Charitable Disbursements | | | \$963,836 |
| Summary: Balance at July 1, 2012 | | | \$19,947,832 |
| Interest & Dividends | 489,931 | | |
| Gain on Investments | 1,724,805 | | |
| Contributions Received | 502,882 | 2,717,618 | |
| Balance Before Expense/Disbursement | | 22,665,450 | |
| Less Expenses | 138,909 | | |
| Less Charitable Disbursement | 963,836 | 1,102,745 | |
| Balance at June 30, 2013 | | | \$21,562,705 |

BENEFITS OF GIVING

Tax Benefit — The Community Foundation is a 501(c)3 organization. Your contribution is fully tax deductible.

Simplicity — One gift can benefit a number of charitable organizations you may wish to support.

Perpetuity — Unlike a gift or bequest to an organization that may or may not survive in the future, you can be assured that your gift to the foundation will continue to provide the benefits you intended for your community.



New Rainbow Hospice Inpatient Facility

SUPPORT A FUND

Donations can be made to the General Fund or to any of the funds listed at left. Or establish your own fund in one of two ways:

Donor-Advised Fund — Allows a donor to make recommendations to the Board on projects they would like to support.

Field of Interest Fund — Allows a donor to specify areas of interest, such as the arts, recreation, beautification, scholarships, or social services, leaving the Board to choose appropriate projects.

To learn more about ways of giving, visit www.fortfoundation.org or contact Program Administrator Sue Hartwick at (920) 222-1191 or facf@fortfoundation.org.