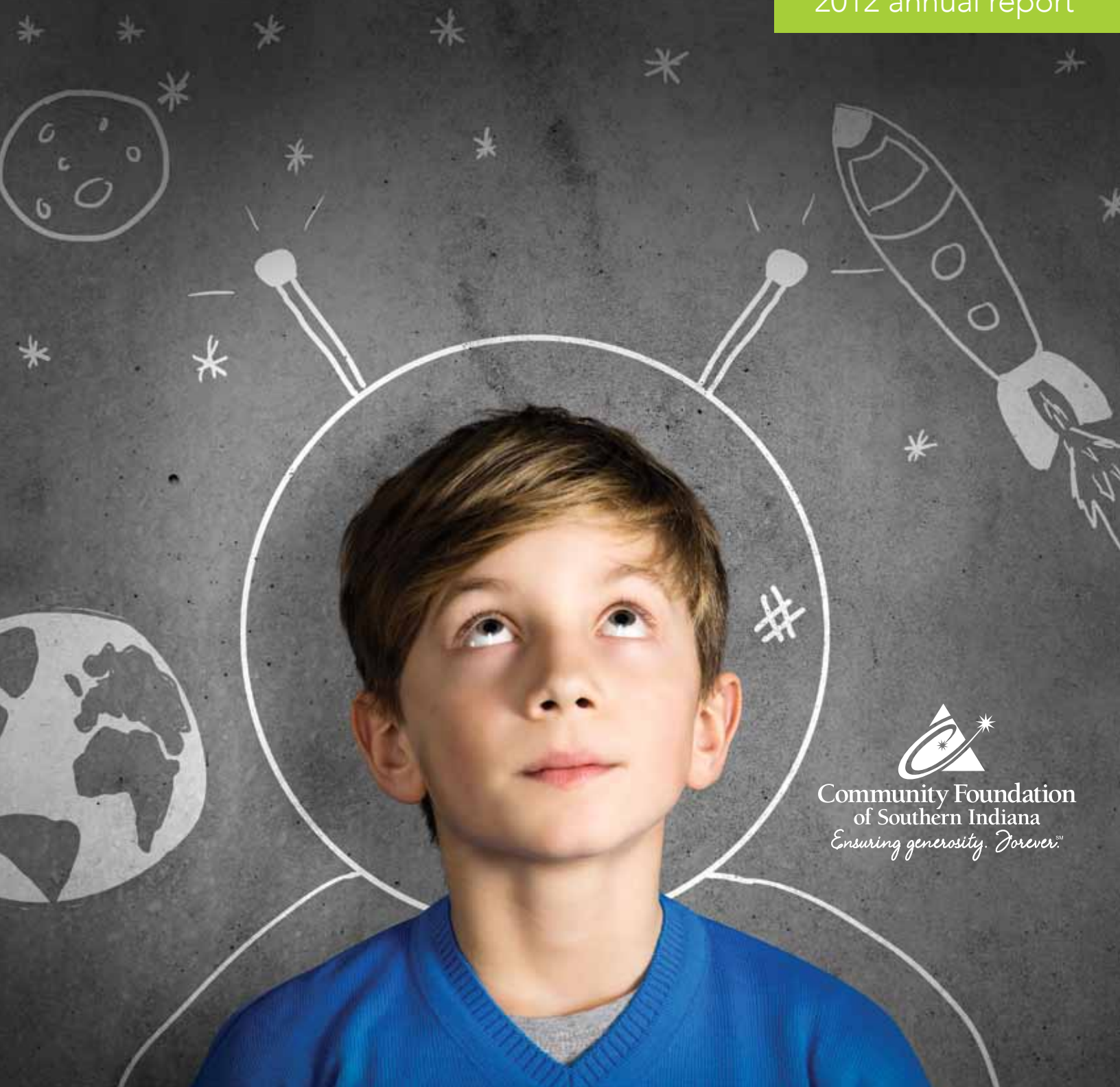


Preparing for the Future Serving in the Present

2012 annual report



Community Foundation
of Southern Indiana
Ensuring generosity. Forever.™

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5%

During the next decade, if everyone in Clark and Floyd counties gave 5% of their estate to the Community Foundation, the total would generate an additional \$7 million in grants to our community, every year.



Dear Friends,

Take a moment to dream a little with us.

Imagine that there's \$7 million more in charitable funding available each year in Clark and Floyd counties. What could we do?

We could:

- *Create safer schools and neighborhoods.*
- *Improve parks and greenways.*
- *Educate more students and provide more scholarships.*
- *Stop hunger.*
- *Provide more, and better, care for the most vulnerable in our communities.*
- *Support arts and culture throughout Southern Indiana.*

In 2012, we studied something that could bring us this type of impact, and so much more. It's called the Transfer of Wealth. Simply put, this is what happens when one generation passes money down to the next generation. We discovered a startling statistic: in the next 50 years, the people of Clark and Floyd counties are expected to pass down \$9.8 billion to the next generation!

But we don't have to wait 50 years. If everyone gave just 5% of their estate to the Community Foundation during the next decade, that would mean \$143 million in estate gifts that would influence change in our community forever. From this invested principal, we could give away an additional \$7 million every year to the causes you care most about. Can you imagine the impact that \$7 million each year in grants could have on our community? And because we would never have to touch the principal, your impact will be felt throughout our community, forever.

Imagine what an additional \$7 million every year could do. The Transfer of Wealth numbers are staggering. The possibilities are limitless. What causes do you love? What future do you see for our community? As we see it, the Transfer of Wealth is the opportunity to converse with those in this community about what they want the future to be. We invite you to join the conversation by making the Community Foundation part of your plans for the future, just as we have, no matter how far down the road it might be. Long-term planning is our specialty.

Dream a little with us as you turn the pages of this report and see the stories of people who are poised to help us make our community better and stronger. Tell us what you think the priorities should be.

Visit www.cfsouthernindiana.com and take our brief survey to help us set priorities for the next several decades.

It's your Community Foundation. It's your community. Help us make these dreams a reality.

Sincerely,

Linda S. Speed, J.D.
President and CEO

Dr. Joseph Jacobi
Chair, Board of Directors



The Community Foundation of Southern Indiana worked with many organizations and volunteers to help the devastated communities in the recovery process.

Devastation, Then Hope

School buses rammed into buildings. Children sheltered with their parents in basements. Homes torn from their foundations and crushed. The March 2, 2012 tornadoes ripped through Southern Indiana with an unprecedented fury. In Henryville, an EF-4 tornado, with top wind speeds of 170 miles per hour, nearly leveled the town, including schools, businesses and homes.

The Community Foundation of Southern Indiana stepped forward in the aftermath to work with other non-profits and community organizations to help the affected areas deal with long-term needs. With extensive resources available to us, we helped shape the recovery that is still ongoing today.

CFSI accepted donations for our Disaster Relief Fund, a special fund created in 2011 to help address long-term recovery and rebuilding efforts for areas affected by natural or other disasters, such as the January 2011 Japan tsunami and the tornadoes in Alabama in June 2011. We received donations from all over the United States and even several international donations. We've given grants to Personal Counseling Services to assist with emotional needs of victims. We also gave funds to Communities in Schools of Clark County to help fund tutoring programs. We funded rebuilding efforts through March2Recovery, and in partnership with the Ogle Foundation, Inc. helped fund a Habitat for Humanity Blitz Build in Henryville.

As the world's attention drifted away from this devastated area, we've remained; which is part of our central mission. We continue to work with people who still have issues stemming from the storms, those not served

CFSI also joined the March2Recovery team, which combined forces from volunteers, non-profits and other foundations throughout the area. More than 11,000 people have volunteered time toward the recovery effort, donating a combined 45,000 hours of time worth more than \$1 million. The March2Recovery team has reached nearly 1,200 area residents, identifying unmet needs and working with residents to help them obtain the items and services they still lack. Of those 1,200 residents, 800 cases were closed, with another 350 residents still receiving active help. Teams have repaired homes and are working on another 26, with more scheduled for work in the coming months. Two-thirds of the cases are closed, and the remainder are still receiving active help, including complete rebuilds or renovations of homes suffering tornado damage.



by other groups and those whose needs are overlooked. It is our goal as a foundation to continue to look down the road, planning for the future and serving in the present.

\$255,000
granted to
recovery efforts





Barbara had not heard of the Transfer of Wealth. But her plans are helping the Community Foundation capture 5% of the funds given from one generation to the next. She's part of the future solution to our community's biggest issues.

Giving Back. Forever.

Barbara Bunuan spent her career in education administration in Kentucky. When she retired to Southern Indiana, she learned all she could about area not-for-profit organizations to see where the need for her volunteerism and financial support existed. She learned about the Community Foundation of Southern Indiana from an acquaintance when she mentioned that she'd like to leave a gift in her estate to benefit local not-for-profit organizations. During her meetings with Community Foundation staff, Barbara learned that just a few sentences written into her will is all it takes to make the gift. Foundation staff, meanwhile, worked with Barbara to create an endowed fund agreement that captured her charitable intent for the future and gave her peace of mind that her wishes for her fund would be carried out long into the future, even when she is no longer here to oversee it. Her one fund will support all of her causes, in her name, in perpetuity. "I'm so pleased to have learned about the Community Foundation," Barbara says. "They've made it so easy for my resources to be used the way I choose, following my lifetime."

2,393 dictionaries

Every third grader in Clark and Floyd counties receives a free dictionary, thanks to CFSI and the Horseshoe Foundation of Floyd County.



The Future of Education

We are a future-focused organization. Nothing puts us more in that mindset than supporting education.

We provide administrative support to the New Albany-Floyd County Education Foundation Inc. (NAFCEF), which was established in 2004 to support New Albany-Floyd County schools by supplementing or paying for educational programs that improve student performance but are not funded by state or local government. The NAFCEF's major goal is to increase investments in technology for the classroom. This year, the NAFCEF provided grants to purchase Smart Boards for several Floyd County elementary and high schools. Smart Boards allow teachers to write, much as they would on a traditional blackboard, but also to pull up websites, video and photos on the board. Smart Boards are the latest in classroom technology – and now more classrooms in our community have this feature.

Each year with our Dictionary Project, the Community Foundation gains a renewed appreciation for children's desire to learn when members of our Board of Directors and staff go to elementary schools and give free dictionaries to all third grade students. CFSI has distributed the dictionaries to students in Clark and Floyd counties since 2009. Generous grants from the Horseshoe Foundation of Floyd County provided the dictionaries for students in Floyd County in 2011 and 2012. The Community Foundation contributed the dictionaries for Clark County. This year, 2,393 dictionaries were distributed in Clark and Floyd counties.

One of our longest-running programs involving youth is the Youth Philanthropy Council. The purpose of the Council is to bring youth on board in meaningful ways and to encourage them to give and serve in their communities. There are currently 22 youth from Clark and Floyd counties serving on the Council, representing five local high schools. Last year, the YPC conducted a holiday toy and gift drive to benefit foster children at Regional Youth Services in Jeffersonville. The recipients ranged in age from infants to 18 years old. A group of Council representatives presented the gifts to Regional Youth Services in mid-December.

More than anything, though, our programs provide youth with opportunities to learn. They're learning new words through dictionaries, finding out about non-profits through our Youth Philanthropy Council, and receiving an education on advanced tools that make learning fun.

Creating more parks and greenways is one of many things donors can do through a gift or bequest to the Community Foundation of Southern Indiana.



Improve Local Parks and Greenways

More than 15 years ago, leaders of the joint New Albany-Floyd County Parks and Recreation Foundation Board started a permanent endowment fund through the Community Foundation of Southern Indiana to help support its guiding mission.

But due to a new resolution, the joint Parks and Recreation Foundation ceased to exist and the city and county parks departments became two separate entities, making the original purpose of the fund obsolete. As an excellent steward of a donor's intent, the Community Foundation worked with city and county leaders to repurpose the fund in order to honor the original intent of the donation, even though the joint parks board was dissolved.

Now the funds will be used to support public parks and green spaces in both New Albany and Floyd County, and grants will be overseen by an advisory board of local leaders.

Scott Klink, a local businessman and advisory committee member for the fund stated, "We couldn't be happier with the Community Foundation's help. Repurposing the fund to match the original intent of the foundation gave us the opportunity to continue to improve the parks system throughout New Albany and Floyd County. We wouldn't have been able to do that without the Community Foundation's assistance."

The Community Foundation of Southern Indiana keeps donations closer to their original intent, long into the future, making it the best choice for donations as assets change hands from one generation to the next through the Transfer of Wealth.

Generations of Green Space

Matt and Jessica Bergman have watched New Albany transform around them. They have owned the Wilcox Block building in downtown New Albany since 2006, before the YMCA built its new facility and before the downtown began its remarkable transformation into a hub of independent restaurants, shops and galleries. The Bergmans rent the first floor as restaurant space for Louis Le Francais, a French bistro, and live on the second and third floors of the building.

Since the birth of their son, Gus, in 2010, they've come to appreciate another aspect of living in New Albany even more; its greenways and parks. Gus enjoys going for a walk with the Bergmans and their dog, Javier, and their destination is usually the New Albany Greenway. Except for a few months in the winter, it provides a welcome way for them and their son to get some exercise and enjoy the outdoors.

"Matt and I both have a strong interest in the outdoors and the environment," Jessica says. "Our interest has grown much keener since we started our family and began



Though the Bergmans are young – both are in their mid-30s – they believe it’s not too soon to start thinking about how they can make a lasting impact on the community they’ve grown to love. They have created a fund with the Community Foundation that will give grants to create and improve parks and green spaces in Floyd County. They can gradually add to this fund during their lifetime and have arranged to fund it from their estates so that their charitable passion will continue, in their names, for generations.

Matt says he likes to think of his grandchildren – and subsequent generations – playing in parks created or supported with their grants. “Giving has to be well-planned and thoughtful to be effective,” Matt says. “By starting our fund now, we’re creating a way for us to be generous a little at a time. Over time, our gifts will build and earn interest, allowing us to make a much greater impact.”

looking for ways to share the outside world with Gus. We believe we have a responsibility to give back to the community, and want to set an example of generosity for our son.”

Stop Hunger in Our Communities

More than 50 million people in America are classified as “food insecure,” which means they are unsure if they will have enough to eat on a daily basis, according to Feeding America, a non-profit organization. About 12 percent of Indiana residents struggle to put food on the table. It’s startling to think that in a nation of such plenty, there are so many going hungry.

Many churches, non-profits and other similar organizations offer food banks for the needy. Stopping hunger is a priority for our donors, staff and board. Through our grant program each fall, we have routinely awarded grants to organizations that offer food programs to needy families in Southern Indiana, including St. Luke’s United Methodist Church, Dare to Care, St. Mary’s Catholic Church, Hispanic Ministry of the New Albany Deanery, Tri-County Health Coalition, Center for Women and Families, Howard Park Christian Church and St. Mark’s United Church of Christ.

While stocking a food pantry can help relieve immediate needs, many of us wonder what our community would be like without hunger.

Would grades go up for children as they are not distracted by hunger? Would senior adults live longer and healthier lives? Would working adults find it easier to hold, and keep, a good job if they didn’t have to worry about having enough to eat? Just a 5% bequest from your estate to the Community Foundation of Southern Indiana – to an endowment fund of your choosing – can help end hunger in Southern Indiana.



With \$7 million more to distribute from donors each year, we could address the reasons why people in our communities don’t have enough to eat. We could work with families to ensure they have what they need on the dinner

\$754,348

Human Services Grants



Provide Basic Needs For Our Most Vulnerable Citizens

“Rotary is built on the foundation of ‘Service Above Self,’” says Rotary Club of Jeffersonville President Kenny Adams. “As Rotarians, we have an obligation to the community to live by this motto both personally and professionally on a daily basis.”

Reaching out into the surrounding community and helping those who need it most is the heart of Rotary Club of Jeffersonville. To help in this mission, in 2005 the club established funds within the Community Foundation of Southern Indiana for its charitable programs. Through these funds, the Rotary Club of Jeffersonville has supported many programs that benefit the most vulnerable, including much-needed grants to assist St. Elizabeth Catholic Charities Maternity Home and the Muscular Dystrophy Association to provide scholarships for youth affected by MD so they can attend the MDA summer camp. Also, grants have been made to Hope Southern Indiana’s RSVP program which encourages retirees and senior citizens to volunteer in numerous ways including mentoring, tutoring and reading to youth, staffing the Angel Trees, and teaching other senior citizens computer skills. The club also supports the Salvation Army’s Angel Tree program, which buys clothing, shoes and other gifts for needy children around the December holidays.

Rotary also participates in Clark County Relay for Life, supports Halloween trick-or-treating for children in downtown Jeffersonville, and has supported the Jeffersonville High School chapter of SADD (Students Against Distracted Driving).

The Jeffersonville Rotary is also using its funds at the Community Foundation to help connect members of local groups with the larger world – an important part of its mission. To that end, Rotary raised \$5,000 for the Lingap Foundation, which supports an orphanage in the Philippines. Fellow Jeffersonville Rotarian Lonnie Cooper is in the second year of his Peace Corps tour working at the Lingap Foundation.

Capturing 5% of the Transfer of Wealth funds in our community could bolster efforts of organizations such as Rotary Club of Jeffersonville – and could increase the Community Foundation’s ability to help our most vulnerable citizens. Through the Transfer of Wealth, Rotary and many organizations like it could do more good for more people, and sustain their important work in our community. Just a 5% bequest from your estate to the Community Foundation of Southern Indiana will help the community build the capacity to do more than you may think possible.

table each night. The Transfer of Wealth funds – which could bring millions more in grants to Clark and Floyd counties each year – can significantly impact the community’s ability to provide for the poor, the elderly, children and the disabled.



The legacy of educator Ruth Braeutigam lives on through the gifts made from her estate.

Support Arts and Culture in Southern Indiana

During her lifetime, Ruth Braeutigam was an educator. She spent more than four decades teaching in New Albany schools.

She also deeply admired beauty, and supported the arts. Her most substantial contribution to the arts in Southern Indiana was the donation of a sculpture by Louisville artist Paul Fields for the lawn of the Paul W. Ogle Cultural and Community Center at Indiana University Southeast. On the day the sculpture was dedicated in 1997, she noted, “By line and design the artist has created a thing of grace and motion. From views across campus it appears to be a pair of hands reaching up, beseeching, and then again a pair of open palms ready to applaud.”

Ruth passed away in 2003 at the age of 89. During her lifetime, she made a donation that was invested as a charitable gift annuity with the Community Foundation. She received proceeds from the fund that gave her steady income. After her death, the balance of her gift has lived on, preserving her memory and legacy through several endowment funds. Each year, her funds support the causes she loved, including her church, cultural amenities and animal welfare organizations.

She’s still very much alive – in spirit – through her carefully planned gifts. Like many others before, Ruth’s gift became part of the Transfer of Wealth helping transform our communities.

If you’d like to learn more about the tool she used to increase retirement income while making a significant future gift – a charitable gift annuity with CFSI - call President and CEO Linda Speed at (812) 948-4662 or e-mail her at lspeed@cfsouthernindiana.com.

\$213,947
in funds distributed in 2012 to culture, arts and education



Two of the remaining members of the Class of 1945, James Gilbert (left) and Dave Varble (right)

Provide More Scholarships

The late 1930s and early 1940s saw tremendous challenges for residents of Clark County. The Great Depression took jobs and homes and challenged families to simply survive. The Flood of 1937 took what the Depression did not. Time, work and war scattered members of the Jeffersonville High School Class of 1945 around the globe. But this class remained bonded through the years due to the shared hardships they had experienced. So they held a reunion in 1955, and then again in 1960. The reunions were so successful that they turned a profit. By 1975, the group had enough to consider doing something important with the funds, and decided to award their first \$100 scholarship in 1978. As reunions continued and members made individual contributions, the scholarship fund has grown substantially. Today, the class awards \$2,500 annually to one graduating Jeffersonville High School senior, with plans to add a second scholarship by the 2014-2015 school year. The fund is administered by the Community Foundation of Southern Indiana, which manages the selection of a recipient and investing the funds. Over the years, more than \$50,000 has been disbursed to college students, and the balance of the fund is more than \$91,000 currently. The scholarship will continue long beyond the lives of the members of the Class of 1945 as a testament to their dedication to their community and their country. "Our goal was to turn this over to an organization that would run the scholarship fund long after we're gone," says Jim Gilbert, one of the members of the class who helps administer class activities and the scholarship fund. "We are sure that the Foundation is the right partner for what we want to do."

As members of the class have planned for the future, and as some have passed away, the scholarship fund has received thousands in donations. Part of the Transfer of Wealth from this generation has begun to flow to the next – and the community is richer for it. More students have received more scholarships because of the dedication of the Class of 1945.

Your Partner in Personal Philanthropy

For two decades, the Community Foundation of Southern Indiana has worked to create great communities in Southern Indiana by promoting and facilitating effective philanthropy. We have accomplished a great deal already, thanks to the generosity of donors who invest through the Community Foundation in their own personal philanthropic passions — whatever those might be — and by being good stewards of those philanthropic investments to build a permanent source of charitable funds for this community.

We work closely with individuals, businesses, non-profit agencies and families to create customized charitable funds that capture all of their philanthropic wishes. Our donors have established more than 200 separate charitable funds — either for the common good of Southern Indiana or for special interests of their own. The Community Foundation holds and invests these assets, and administers each fund in accordance with its donors' wishes, often in perpetuity. Our donors appreciate the flexibility, ease and cost-effectiveness of giving through the Community Foundation.

It is easy to donate to your favorite charitable causes through your own personalized fund at the Community Foundation. Just give us a call at (812) 948-4662 to get started.

Permanent Endowment Funds

Donors who would like to create a permanent legacy for their charitable interests may establish an endowment fund. With endowment funds, principal is never spent. Instead, a portion of earnings becomes available each year, based on the Foundation's spending policy, for grants to the donor's specified charitable cause. Endowment funds, which may be started with a minimum gift of \$5,000, are a wonderful way to support your favorite organizations or interests, in your name, forever.

Pass Through Funds

Donors who want to streamline their current giving often establish a pass through fund at the Foundation. With an initial minimum gift of \$1,000, your fund may make grants, at any time, to your favorite charitable causes, as long as assets remain in the fund. Many donors make additional contributions to their fund over time to sustain current giving. You keep track of only one tax receipt, but may make as many charitable gifts as you like from your single contribution. Pass through funds are an excellent way to take advantage of a windfall or bonus, or the need for an income tax charitable deduction, and can help simplify your giving year-round.

Ways to Give

Each citizen in our community has unique interests and ideas for how to give back. Whatever your goals, whatever your means, whatever your passions, the Community Foundation will help you create a customized charitable fund to realize your dreams. Do you want to help students attend college? Would you like your children and grandchildren to one day help determine the charitable organizations that benefit from your fund? Are there specific non-profits — perhaps your alma mater or church — that should always benefit from a fund you create? Is there a particular area of interest, such as children's health, the environment or education, that you would like your fund to always address? Or do you simply want to give back to your community and help address its greatest needs at any given time?

All of these goals are possible through a customized charitable fund created at the Community Foundation. If you can dream it, we can help you achieve it.

Why Give Through the Community Foundation?

We make your giving easy, flexible and meaningful. We take all of the administrative details, investment issues, reporting and regulatory requirements out of your hands. You simply decide the charitable purpose of your fund, and we do the rest. A single gift can create a fund that will further your personal giving goals in perpetuity.

The chart below can help you decide if creating a fund at the Community Foundation is right for you.

Is a Fund at the Community Foundation Right For You?

WHAT IS YOUR GOAL?	TYPE OF FUND TO CONSIDER:
I currently support one or more charitable causes	You can create an endowment or pass through fund customized to fit your interests that will streamline and simplify all of your current giving – one gift, one tax receipt, and your one fund can benefit as many charities as you like.
I want to involve my children and my grandchildren in learning to give back	A family advised fund can provide the benefits of a private foundation without the hassles and expense, and can involve several generations of advisors to facilitate a family tradition of giving.
I know the particular charities that I always want to support	Your fund will send annual checks in your name to your selected charities.
I want to help students get an education	A scholarship fund can be customized to benefit students from a particular school or those studying a particular field, or whatever focus you choose.
I want to give back to my community	A Community Endowment fund in your name will support the community's needs now and in the future.
I want to create a permanent legacy for my charitable interests	You can make a gift to the Community Foundation in your will or trust; we will work with you to create a customized endowment fund for the future that will benefit your favorite causes, in your name, forever.

2012 Financial Highlights

Total Assets as of December 31, 2012 \$ 23,679,552








Total Gifts in Calendar Year 2012 \$ 1,894,482

Total Number of Gifts 858

Average Amount of Gift \$ 2,208






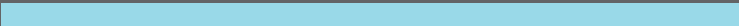
Total Grants in Calendar Year 2012 \$ 1,427,994

Endowed Funds - By Type

Planned Gift Funds	\$ 1,184,572	
Donor Designated Funds	1,196,202	
Field of Interest Funds	1,355,527	
Agency Funds	1,671,340	
Donor Advised Funds	3,948,263	
Board Advised Funds	4,024,434	
Scholarship Funds	6,657,724	

Total Endowed Funds \$ 20,038,062











Non-Endowed Funds - By Type

Donor Designated Funds	\$ 1,651	
Board Advised Funds	3,070	
Agency Funds	40,182	
Scholarship Funds	114,055	
Field of Interest Funds	146,472	
Donor Advised Funds	1,031,544	

Total Non-Endowed Funds \$ 1,336,974

Total Funds \$ 21,375,036

Grants by Purpose

Environment	\$ 200	
Recreation	14,250	
Community Development	15,797	
Religion	19,126	
Arts and Culture	21,196	
Youth Development	54,784	
Health	59,618	
Education	192,751	
Scholarships	295,924	
Human Services	754,348	

Total 2012 Grants \$ 1,427,994

Board Advised Funds

In 2012 the Community Foundation granted more than \$126,000 to 51 organizations serving residents of Clark and Floyd counties from the Foundation's Community Endowment, our unrestricted permanent endowment fund. This discretionary fund is used each year by our board of directors, through our Community Grants Committee, to award grants that provide for the community's most pressing needs in Clark and Floyd counties.

If you want to give back to the community you call home, but don't have a specific cause in mind, you can contribute to the Foundation's Community Endowment, which benefits our entire service area. A minimum gift of \$1,000 creates a Community Endowment Fund named for you. This is the most flexible type of fund for anyone who wants to give back to the community. We would like to recognize the following donors who created funds within the Community Endowment that help us to support the programs of so many deserving not-for-profit organizations in our area.

Friends of the Community Foundation of Southern Indiana Fund
John and Martha Hartstern Family Fund
The Patrick T. Cody Fund
The Shane Cody Fund
Lighting the Way Fund
The Huffman Family Endowment Fund
The Joe & Kathy Jacobi Fund
Mr. & Mrs. Anthony M. Zakrzewski Fund

Community Grants – Addressing Today's Needs

Each year the Community Foundation offers competitive grants through our Community Endowment Fund to local 501(c)3 non-profit organizations. These non-profits must serve residents of Clark or Floyd counties but need not be physically located here. We look for existing or innovative programs that serve broad sections of the population. We primarily fund needs in the areas of arts and culture, community development, education, health, human services, recreation, environment and youth development. Each fall grants of up to \$5,000 are awarded to deserving organizations.

While we awarded more than \$126,000 in 2012, the need always exceeds available resources.

With that in mind, when you think about your own charitable giving, we encourage you to consider supporting our Community Grants program. Your contribution of any amount can support the current year's grant funding or add to the Community Endowment Fund which provides an annual amount for our grants.

To learn more, please visit www.cfsouthernindiana.com and click on "Grants."

Arts and Culture

Actors Theatre of Louisville
Carnegie Center for Art & History
Falls of the Ohio Foundation
Louisville Visual Art Association
Paul W. Ogle Cultural and Community Center at IUS

Community Development

Floyd County Token Club
Clark Legal Self-Help Center
Keep New Albany Clean and Green
Southern Indiana Asset Building Coalition

Education

Jeffersonville High School Instrumental Band Boosters, Inc.
Jeffersonville Township Public Library
New Albany-Floyd County Consolidated School Corporation (S. Ellen Jones Elementary)
New Albany-Floyd County Education Foundation, Inc.
Visually Impaired Preschool Service
West Clark Community Schools (Silver Creek Elementary)

Health

Alzheimer's Association
Brandon's House Counseling Center, Inc.
Clark Memorial Hospital Foundation
Floyd County Maternal and Child Health Clinic
Floyd Memorial Foundation
LifeSpring, Inc.
Our Place Drug & Alcohol Education Services, Inc.
Personal Counseling Service, Inc.
Tri-County Health Coalition of Southern Indiana

Human Services

Center for Lay Ministries, Inc.
Center for Women and Families
Centenary United Methodist Church
Central Christian Church
Clark County Youth Shelter and Family Services, Inc.
Communities in Schools of Clark County, Inc.
Dare to Care Food Bank
Family & Children's Place
Goodwill of Southern Indiana, Inc.
Hope Southern Indiana
Hospasus - Hospice of Southern Indiana
LifeSpan Resources, Inc.
Pleasant Ridge Baptist Church
Rauch, Inc.
St. Luke's United Church of Christ
St. Mark's United Church of Christ
St. Mary's Catholic Church
Volunteers of America of Kentucky, Inc.
Yellowwood Terrace

Recreation

Clark County Soccer Association, Inc.
Henryville Youth Sports, Inc.

Youth Development

Big Brothers and Big Sisters of Kentuckiana
Boy Scouts of America
Home of the Innocents, Inc.
Junior Achievement of Kentuckiana, Inc.
Miles for Merry Miracles
YMCA of Southern Indiana

CFSI Fund Listing as of December 2012

Donor Designated Funds

Art Award Trust Fund

to fund awards for students in grades 8-12 through the New Albany-Floyd County Secondary Schools Art Competition.

C.J. Smith, Jr. Memorial Endowment/New Albany Deanery Youth Ministries Fund

to support the New Albany Deanery Catholic Youth Ministries.

Center for Cultural Resources at IUS Fund

to support the Center for Cultural Resources at Indiana University Southeast.

Charles L. Shedd Fund

to support the Charles L. Shedd Kentucky Association for Dyslexia in providing instruction to students residing in Clark and Floyd counties.

Children's Hospital Foundation Fund

to support Kosair Children's Hospital in Louisville, Kentucky.

City of Jeffersonville Parks and Recreation Fund

to support the City of Jeffersonville Parks and Recreation Department.

Clark County Youth Philanthropy Council Fund

to support the philanthropic activities of the Clark County Youth Philanthropy Council.

Clarksville Community Schools Foundation Fund

to support Clarksville Community Schools.

Eugene and Marilyn Glick Foundation Fund

to support the Arts Council of Southern Indiana and Brandon's House Counseling Center.

Falls of the Ohio Aquarium Fund

to support and maintain the Falls of the Ohio Aquarium Project.

Floyd County Youth Philanthropy Council Fund

to support the philanthropic activities of the Floyd County Youth Philanthropy Council.

Harrison County Youth Philanthropy Council Fund

to support the philanthropic activities of the Harrison County Youth Philanthropy Council.

IUS/Bayward and Mary Ann Cole Scholarship Fund

to provide support for Indiana University Southeast scholarships.

Ivy Tech Health Science Division Fund

to support the Health Science Division at Ivy Tech Community College, Sellersburg, IN.

Jeffersonville High School Bus Fund

to maintain the "Big Red" bus used by athletics at Jeffersonville High School.

Jeffersonville Iraq-Afghan Memorial Fund

to maintain the Iraq-Afghan Memorial through the Jeffersonville Parks and Recreation Department.

John Woehrle Fund for Clark Memorial Hospital Foundation *

to provide support to Clark Memorial Hospital Foundation, Jeffersonville, IN, for general purposes.

Larry Wittlig Endowment Fund

to support Kosair Children's Hospital in Louisville, KY, and the Park Memorial Endowment Fund.

Lynn Thomsen Memorial Fellowship Fund for the Mary Anderson Center

to support the Park Tudor School in Indianapolis, IN.

Marietta College Endowment Fund/Larry Wittlig Scholarship

to provide support to Marietta College.

Monroe Shine Fund

to support the charitable economic development efforts of One Southern Indiana.

New Albany-Floyd County Diversity Scholarship Fund

to provide support to students and educators in the New Albany-Floyd County Consolidated School Corporation.

New Albany High School Alumni Memorial Fund

to support the educational efforts of New Albany High School.

Newman/Murray State University Endowment Fund

to support the Murray State University Department of Foreign Languages.

Noah's Ark Endowment Fund

to support Noah's Ark in Jeffersonville, IN.

Personal Counseling Service Fund

to support Personal Counseling Service in Clarksville, IN.

Rauch at Hawthorne Glen Fund

to support Rauch, Inc. in the development of assisted living facilities at Hawthorne Glen.

Ruth Braeutigam Fund A

to support St. Mark's United Church of Christ in New Albany, IN.

Ruth Braeutigam Fund B

to support the Culbertson Mansion and Friends of Fairview Cemetery in New Albany, IN.

Ruth Braeutigam Fund C

to support the Scribner House and the Floyd County Animal Rescue League.

Saint Meinrad Archabbey Endowment Fund

to support Saint Meinrad Archabbey.

Sandra R. Patterson-Randles and R. Jeffrey Randles IUS Library Endowment Fund

to support Indiana University Southeast for the benefit of the Library.

The Salvation Army Fund

to support the Salvation Army in New Albany, IN.

Wesley Chapel United Methodist Church Endowment Fund

to support Wesley Chapel United Methodist Church.

Donor Advised Funds

Ashe Padhya Fund

Borden Lions Club Foundation Fund

Clarksville Parks Foundation Fund

David L. McCooe, Jr. Award Fund

Dora and Casey LaDuke Advised Endowment Fund

Eckart LLC Corporate Advised Fund

The Garmon Family Fund

Gary and Angie Banet Family Fund

James H. Becker Charitable Fund

Jeffersonville Rotary Special Projects Fund

The Joe and Kathy Jacobi Fund

John and Shirley Woehrle Fund

John Johnston Family Endowment Fund

John Johnston Pass Through Fund

Keith and Laurie Pulliam Fund *

Kelsey Lynn Martin Memorial Advised Fund

Matt and Jessica Bergman Fund *

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The Neely Family Fund *

The Neely-LaFollette Family Fund *

The Paris Group Fund

The Reinhardt Family Fund

Rotary Club of Jeffersonville Endowment Fund

S. Butch Shaw Fund

Samtec Inc./Blue Sky Foundation Charitable Fund

Schmitt Furniture Family Fund

The Speed Family Fund

United Charities/Washington C. DePauw Endowment Fund

Warder Park Passthrough Fund

Wellhouse Fund

Willie Bostick Institute Fund

Woehrle Family Fund

Wood-Carr Community Fund

Wood-Carr Community Passthrough Fund

York Academy of Discovery Fund

Your Community Bank Charitable Foundation Fund

Agency Funds

Arts Council of Southern Indiana Best of Show Award Fund
Brandon's House Fund
Brooklawn Child and Family Services Endowment Fund
The Carnegie Center for Art and History, Inc. Fund
Childplace, Inc. Fund
City of Jeffersonville Beautification Fund
Clark County 4-H Foundation Fund
Clark County Early Warning System Passthrough Fund
Clark County Natural Resources Conservation Fund
Clark Memorial Hospital Foundation Agency Fund
Clark Memorial Hospital Foundation Fund
Communities In Schools of Clark County Endowment Fund
Communities In Schools of Clark County Passthrough Fund
Council on Developmental Disabilities Fund
Develop New Albany Endowment Fund
The Falls of the Ohio Foundation Fund
First Presbyterian Church, Jeffersonville Indiana Endowment Fund
Floyd Central High School Fund
Floyd Central Student Council Scholarship Fund
Floyd County Animal Rescue League Fund
Floyd County Humane Society, Inc. of New Albany, IN Fund ★
Friends of Nursing-Clark Memorial Hospital Foundation Fund
Goodwill of Southern Indiana, Inc. Endowment Fund
Hispanic Connection of Southern Indiana Fund
Home of the Innocents Endowment Fund
Hope Southern Indiana Fund
Hospice of Southern Indiana Foundation, Inc. Endowment Fund
Howard Steamboat Museum Operating Endowment Fund
Humane Association of Clark County Fund
IU Southeast Library Endowment Fund
Jeffersonville Evening Optimist Fund
Jeffersonville Township Public Library Endowment Fund
Jewish Hospital and St. Mary's Foundation Fund
Junior Achievement of Kentuckiana Endowment Fund
LifeSpan Resources Endowment Fund
Lifespring Foundation of Indiana, Inc. Endowment Fund
New Chapel United Methodist Church Fund
Open Door Youth Services Fund
Park Memorial Endowment Fund
Prevent Child Abuse of Clark & Floyd Counties Fund
Providence Retirement Home Fund

Providence Self Sufficiency Ministries Fund
Robert E. Carter Society Fund
Silver Heights Campground, Inc. Fund
Supplies Over Seas Endowment Fund ★
United Way of Clark County Endowment Fund
United Way of Clark County Endowment Fund B
United Way of Floyd County Fund
West Clark Literacy Foundation Fund
YMCA of Southern Indiana Fund

Field of Interest Funds

Charlestown Education Endowment Fund

to enhance or contribute to the educational instruction of students attending public schools in Charlestown Township, Charlestown, Indiana.

Commerce America Foundation Fund

to provide funds for projects to support charitable agencies in Clark and Floyd County specifically for social service and vocational education.

Community Foundation of Southern Indiana Disaster Relief Fund

to support disaster relief efforts locally, nationally, and abroad to areas affected by natural and other disasters.

Floyd County CAPE Endowment Fund

to continue early literacy and education programs initiated by the 2005 CAPE grant for the New Albany Floyd County Consolidated Schools.

John and Shirley Woehrle Unrestricted Endowment Fund for Clark County

to support Clark County charitable agencies.

Norman E. and Katherine S. Pfau Endowment Fund

to support Clark County charitable agencies.

Parks and Recreation Foundation Fund

to support the maintenance, improvement, enhancement or establishment of public parks, greenways, sports and recreation facilities, and public health and safety projects in New Albany, Floyd County.

Parks and Recreation Foundation Endowment Fund

to support the maintenance, improvement, enhancement or establishment of public parks, greenways, sports and recreation facilities, and public health and safety projects in New Albany, Floyd County.

Silvercrest Endowment Fund

to permanently support organizations that serve disabled persons in Southern Indiana.

Silvercrest Grant Fund

to support programs of organizations that serve disabled persons in Southern Indiana.

VNASEI Endowment Fund

to support and provide indigent health care in Clark, Scott and Washington Counties.

Women's Foundation of Southern Indiana Board Fund

to permanently support organizations that improve the quality of life for girls, women and their families in Southern Indiana.

Women's Foundation of Southern Indiana Grant Fund

to support programs of organizations that improve the quality of life for girls, women and their families in Southern Indiana.

Supporting Organizations

Jeffersonville Carnegie Library Foundation, Inc.
OSI Foundation, Inc.
New Albany-Floyd County Education Foundation, Inc.
4100 Charlestown, Inc.

In 2012, The Community Foundation of Southern Indiana distributed 98 scholarship awards with a combined value of \$296,000. Students who received the scholarships plan to study everything from music to business. Some students would not have pursued education beyond high school without these important scholarships. Our thanks go to the following scholarship funds and their generous donors for their contributions to the educational attainment of the next generation of community leaders.

Scholarships - Selected by the Community Foundation

American Legion Bonnie Sloan Post 28 Fund

Awarded to high school graduates from Floyd Central, Christian Academy of Indiana, New Albany or Providence. The applicant and at least one of his or her parents or guardians must be residents of Floyd County with a preference for those attending a two-year program such as a trade school.

Blue Sky Foundation Fund

Awarded to a graduate from a high school in Clark or Floyd counties with a strong preference for technology, engineering and business related fields.

Cleo Fund

Awarded to students in Clark or Floyd County who have faced many challenges in attaining their educational goals, allowing him/her to pursue a bachelor or associate degree on a full or part time basis.

Community Foundation of Southern Indiana Education Fund *

Awarded to Southern Indiana students seeking post-secondary education (two or four-year college degree, vocational or other type of certificate or credential).

Edward Endres Memorial Scholarship for Boys and Girls Fund

Awarded to a graduating senior who has been an active member of the Boys and Girls Club of New Albany or Jeffersonville with a preference for a New Albany club member.

Hazel and Walter T. Bales Scholarship Fund

Awarded to a Jeffersonville High School student majoring in the field of business.

Helen L. Siebert Scholarship Fund

Awarded to a graduating senior who is pursuing post secondary education with a preference for those attending Purdue University and pursuing studies in family and consumer science.

Hugh and Mabelle Scott Scholarship Fund

Awarded to graduating seniors from New Washington, Charlestown, and Jeffersonville High Schools to be used to further their studies in the field of music.

JHS Class of 45 Endowed Scholarship Fund

Awarded to a graduate of Jeffersonville High School who demonstrates financial need and academic achievement.

John C. Gatz Memorial Scholarship Fund

Two scholarships are awarded, one to a student at Providence High School, and one to a student who lives in Clark or Floyd counties. Applicants must take a photograph and write an accompanying essay around the theme "Capture Life".

Lilly Endowment Community Scholarship

Lilly Endowment Inc., through Independent Colleges of Indiana, provides funding for two students in each county served by the Foundation: Clark & Floyd. The award covers the full cost of tuition, room, board and fees, with an additional book stipend, for up to four years at any accredited public or private Indiana college or university.

Michael L. Becher Law Enforcement Scholarship Fund

Awarded to a graduating senior from a high school in Clark County and resident of Clark County pursuing a major in law enforcement or criminal justice.

Ottis & Lenora Wright Scholarship Fund

Two scholarships are awarded: one to a graduating senior from William W. Borden High School majoring in specific fields of study; and one to graduating seniors from public high schools located in select Indiana and Kentucky counties. Qualifying candidates must attend Purdue University or Vincennes University in Indiana or Western Kentucky University or Morehead State University in Kentucky, and must be enrolled in an agriculture department program.

Paul W. Ogle Scholarship Fund

Awarded to outstanding graduating seniors from selected high schools who are seeking a four-year, associate or vocational degree. Students must be graduating seniors and rank in the top 25% of their class.

Raymond Rhodes Scholarship Fund

Awarded to a graduating senior from Borden, Charlestown, Clarksville, Henryville, Jeffersonville, New Washington, Providence, and Silver Creek High Schools, or any student outside of Clark County enrolled in a graphic communication program at Prosser. The student must attend a full-time, post-secondary education pursuing a career in the field of printing technology or graphic arts. Strong preference is given to those pursuing a career in printing technology (press, prepress, or bindery operations).

Retired Teachers Scholarship Fund

Awarded to an Indiana resident who is a graduating senior from Clark, Floyd, Harrison, or Crawford County and is a son, daughter, grandson, or granddaughter of an active, retired, or deceased member of the Indiana State Teachers Retirement Fund.

Robert E. Moser Agricultural Scholarship

Awarded to a graduating senior from Floyd County, with a preference for those attending Purdue University and majoring in an agricultural or family science related field.

Scholarship Funds Selected by Others

20 Under 40 Fund Scholarship Fund *

Awarded to incoming freshmen attending Ivy Tech Community College of Southern Indiana or Indiana University Southeast who have demonstrated significant community involvement.

A. Fielder Myers Scholarship Fund

Awarded to a graduating senior from New Albany High School with emphasis in the study of music.

Alice L. Greene Scholarship Fund

Awarded to a graduating senior from New Albany High School.

Alice Ranck Hettle Scholarship Fund

Awarded to a graduating senior from New Albany High School with emphasis in Latin studies.

American Heritage Scholarship Fund

Awarded to a graduating senior from New Albany High School with emphasis in Social Studies.

Art Award Trust Fund

Awarded to a New Albany or Floyd Central High School senior planning to attend art school at the college level, in years that the New Albany Floyd County Secondary Schools Art Show does not make awards for their program.

Arthur and Lois Berlin Memorial Scholarship Fund

Awarded to a graduating senior from Corydon Central High School.

Bette Bennett Hammond Memorial Scholarship Fund

Awarded to a graduating senior from New Albany High School.

Charles and Dorothy Galligan Scholarship

Awarded to a student attending Our Lady of Providence Senior High School with demonstrated financial need.

\$296,000 in scholarships awarded in 2012

Claire Dufton "Freechild" Challenge Scholarship Fund

Awarded to a graduate from Jeffersonville High School who demonstrates financial need.

Clarence R. Hay Memorial Scholarship Fund

Awarded to a senior from Charlestown High School.

Clark Memorial Friends of Nursing Scholarship Fund

Awarded to a student pursuing an education in nursing.

Coach Alex Thom Scholarship Fund

Awarded to a graduating senior from New Albany High School who has participated in athletics and earned at least one varsity letter with preference for students demonstrating financial need.

Ed Adams Fund - Arts Council of Southern Indiana Fund

Awarded to a student from Floyd Central or New Albany High School who has participated in the arts or music.

Ethan Bennett Memorial Scholarship Fund *

Awarded to a graduating senior from Silver Creek High School who will attend any Indiana private or public accredited college or university.

Fleshman Memorial Scholarship Fund

Awarded to a graduating senior from Jeffersonville High School who has significant financial need. Candidate may not pursue a degree in physical education and must not have been a varsity athlete.

Floyd Central PTA Scholarship Fund

Awarded to a graduating senior from Floyd Central High School with an interest in teaching.

Floyd Memorial/Ivy Tech Scholarship Fund

Awarded to a student from Ivy Tech Community College of Southern Indiana who is pursuing a degree in nursing.

Forrest McCaffry Scholarship Fund

Awarded to a graduating senior from New Albany High School who has earned at least one varsity letter and typifies the spirit displayed by Coach Forrest McCaffry.

Gamma Chi Sorority Nursing Scholarship Fund

Awarded to a graduate from New Albany High School who plans to enter nursing.

In Name of Jesus Ministries Scholarship Fund

Awarded to a graduating senior from New Albany High School.

IUS Paul Ogle Scholars Fund

Awarded to a student attending Indiana University Southeast who has a minimum SAT score of 1300 and/or ACT score of 29 with a preference for students from Clark, Floyd, Harrison, Scott, Washington and Switzerland counties in Indiana.

IUS Scholarship Fund

Awarded to a student officially admitted to Indiana University Southeast and committed to enrolling. For consideration the recipient must have and maintain a 3.0 GPA.

IUS Scholarship Fund/Community First Bank

Awarded to a graduate from Crawford County High School attending Indiana University Southeast.

IUS/Clark Memorial Hospital Foundation Endowment Fund

Awarded to a student attending Indiana University Southeast who is studying nursing or other health-related curriculum, or taking courses in leadership skills, management, finance and other areas of education that will allow the student to develop the skills to manage a department or team in a business or professional setting, including a hospital clinical area.

IUS/Dr. Herb E. Smith Scholarship Fund

Awarded to a graduate from Crawford County High School attending Indiana University Southeast.

IUS/Floyd Memorial Foundation Health Career Scholarship Fund

Awarded to a student from Indiana University Southeast who is pursuing a degree in nursing.

IUS/Harold Lacy Scholarship Fund

Awarded to a student attending Indiana University Southeast who has graduated from Clarksville High School.

IUS/John and Shirley Woehrle Scholarship Fund

Awarded to three graduating seniors planning to attend Indiana University Southeast: two Jeffersonville High School seniors with preference for one to be an athlete, and one to a Crawford County High School senior.

IUS/Leon Rand Scholarship Fund

Awarded to a student attending Indiana University Southeast.

IUS/Medical Center Scholarship Fund

Awarded to a resident of North Clark County who is attending Indiana University Southeast.

IUS/Phillip and Mary Louise Brown Scholarship Fund

Awarded to a student attending Indiana University Southeast with a preference for Crawford County.

IUS/Roy Goode Memorial Scholarship Fund

Awarded to a junior chemistry major attending Indiana University Southeast.

IUS/Scott Memorial Hospital Endowment Fund

Awarded to a student from Indiana University Southeast who is interested in nursing, allied health, or other health-related field of study.

Ivy Tech Scholarship Fund for Prosser School of Technology

Awarded to graduates from Prosser School of Technology who are pursuing education at Ivy Tech Community College of Southern Indiana.

Ivy Tech-Clark Memorial Scholarship Fund

Awarded to students attending Ivy Tech Community College of Southern Indiana who are studying nursing, allied health or other health-related curriculum or taking courses in leadership skills, management, finance and other areas of education that will allow the student to develop the skills to manage a department or team in a professional business setting, including a hospital clinical area.

Ivy Tech-Jesse Ballew Family Scholarship Fund

Awarded to a student attending Ivy Tech Community College of Southern Indiana with a preference for a member of Graceland Baptist Church and/or attending Christian Academy of Southern Indiana.

Joseph B. McClain Scholarship Fund

Awarded to a graduating senior from New Albany High School.

Kelsey Lynn Martin Memorial Scholarship Fund

Awarded to a graduating senior from Floyd Central High School interested in majoring in a science or musical field.

Kelsey Martin Memorial Tennis Tournament Scholarship Fund

Awarded to a graduating senior from Floyd Central High School who has been an active participant on the Floyd Central Tennis Team for a minimum of two years with a preference to those with demonstrated leadership abilities.

Kiwanis Scholarship Fund

Awards two scholarships: one to a graduating senior from New Albany High School in memory of Harry Weber; and one to a graduating senior from New Albany High School pursuing a degree in engineering in memory of Robert Lohmeyer.

Lewis A. Endres Memorial Scholarship Fund

Awarded to a graduating senior from New Albany High School.

Louise Ross Scholarship Fund

Awarded to a Clark County youth to further his/her education or training after high school.

Lucille Oster Scholarship Fund

Awarded to a graduating senior from New Albany High School planning to pursue elementary education with preference for a female applicant.

M. Lucille Reisz Scholarship Fund

Awarded to a graduating senior from New Albany High School who plans to pursue a career in elementary education.

Mark Douglas Scholarship Fund

Awarded to a graduating senior from New Albany High School.

Martha Hartstern Nursing Scholarship Fund - Ivy Tech

Awarded to an incoming non-traditional student planning to attend Ivy Tech Community College of Southern Indiana who is pursuing nursing. Assistance is for books only.

Martin Luther King Scholarship Fund

Awarded through the Jeffersonville Clark County NAACP Youth Coalition.

Mattie Loughmiller Scholarship Fund

Awarded to a graduate from New Albany High School planning on attending a two or four year college program and who attended S. Ellen Jones Elementary School, kindergarten through sixth grade.

The Melvin and Marjorie Garriott Scholarship Fund

Awarded to graduating seniors from Scottsburg and Salem High Schools.

New Albany PTA Scholarship Fund

Awarded to a graduating senior from New Albany High School with an interest in teaching.

The Newman/Wittlig Endowed Scholarship Fund

Awarded to a graduating senior who is a member of the Park Memorial United Methodist Church.

Pearl Morris Nursing Scholarship Fund

Awarded to a graduating senior from New Albany High School with an interest in nursing.

Pride of Galena Scholarship Fund

Awarded to a graduating senior from Floyd Central High School who attended Galena Elementary School for at least one year.

Reverend Farris & Dr. Ramona Clifton Scholarship Fund

Awarded to incoming or current students enrolled in any program at Ivy Tech Community College of Southern Indiana. The recipient must complete two hours of community/volunteer service each week during the semester they receive this award.

Robert L. Holmes Educational Scholarship Fund

Awards two scholarships to graduating seniors: one from New Albany High School and one from Floyd Central High School.

Roland H. Money Scholarship Fund

Awarded to graduating seniors from Borden High School attending a four-year public/state college or university in Indiana.

Scribner Family Endowment Scholarship Fund

Awarded to a graduating senior from New Albany High School who demonstrates good citizenship.

Shanda Sharer Scholarship Fund

Awarded to a graduating senior from Prosser School of Technology with a preference for financial need.

Sheila Bramlett Memorial Fund

Awarded to a graduating senior from New Albany High School.

Steven Bailey Memorial Scholarship Fund

Awarded to a graduating senior from Floyd Central High School.

Tim Brunmeier Memorial Fund

Awarded to a graduating senior from Floyd Central High School who has participated in band with a preference for those continuing their education in music.

Wayne Gahlinger Memorial Scholarship Fund

Awarded to a graduating senior from New Albany High School.

Your Community Bank Scholarship Fund

Awarded to graduating seniors in all communities which Your Community Bank serves.

Lilly Endowment Community Scholars

Four graduating seniors in Clark and Floyd counties were chosen from 136 applicants to receive full four-year scholarships.

The students also received a \$900 annual stipend to be used for books and required class materials. Lilly Endowment Inc., through Independent Colleges of Indiana, awarded the scholarships to two students in each county served by CFSI. Students may attend any accredited public or private university in Indiana. The Community Foundation is proud to administer these scholarships on behalf of the Lilly Endowment.

The program awards 142 scholarships statewide and is part of a Lilly Endowment initiative to help more Indiana students gain access to higher education.



Alonzo Shepherd
Jeffersonville High School,
Indiana University



Kathleen Lyon
Jeffersonville High School,
Indiana University



Chance'a "CJ" Roberts
New Albany High School,
Indiana University



Matthew Baumgartle
New Albany High School,
Purdue School of Technology

Professional Advisor Spotlight - Gary Banet

Estate planning attorneys help their clients create a legacy. Funding charitable wishes is often part of that. For Gary Banet, an attorney in the Southern Indiana office of Wyatt, Tarrant & Combs, the Community Foundation of Southern Indiana is a key partner in helping clients achieve their dreams.

Community Foundation staff work with those who want to create a fund to meet their own charitable needs now, and those who want to leave a gift to a favorite non-profit, school or church as a bequest that can positively impact the organization for generations. The Community Foundation is uniquely positioned to accept unusual gifts of real estate, insurance proceeds or many other types of assets in addition to cash and appreciated stock.



Gary Banet

“Every time I’ve referred a client to the Community Foundation, they’ve taken great care of them and helped me meet their needs,” Gary says. “In our estate planning practice, we have the opportunity to work with numerous community foundations, and ours in Southern Indiana is very sophisticated in its capabilities. I have the comfort of knowing my clients are in good hands, and that by helping them leave their charitable legacy through the Community Foundation, I’m helping create a better future for Southern Indiana.”

Gary’s work is helping leverage the transfer of wealth in our community as it passes from one generation to the next. If the Community Foundation of Southern Indiana can leverage just 5% of this transferred wealth in funds like the ones created by Gary’s clients, we can help fund the needs of our community for generations to come.

Sample Bequest Language

Language for IRA or insurance beneficiary designation

Beneficiary: The Community Foundation of Southern Indiana, Inc. (Tax ID # 35-1827813) for the _____ Fund.

Language for bequest

I give and bequeath _____ (describe gift) to The Community Foundation of Southern Indiana, of New Albany, Indiana, to be held as a component fund known as the “_____ Fund.” This fund was separately created for the charitable purposes agreed to by me and The Community Foundation of Southern Indiana.

I’d like to know more

The Community Foundation of Southern Indiana is honored to be your partner in philanthropy. If you or your professional advisor would like to learn more about our giving options, please contact Linda Speed, J.D., President & CEO, at lspeed@cfsouthernindiana.com or (812) 948-4662. You may also visit our website at www.cfsouthernindiana.com.

Our Donors

Throughout 2012, we received gifts from many people who support our vision and mission of creating great communities in Clark and Floyd counties. We want to take a moment here to thank each of them for their donations. Also in 2012, we received many gifts from around the world for our Disaster Relief Fund, specifically for the Clark County tornadoes

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in March 2012. Because of space limitations, the names of those donors are listed on our website under News and Events. You can find our website at www.cfsouthernindiana.com.

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Anonymous Donors (2)

Making Plans Now, For the Future

There are several ways to structure a legacy gift that allows you to create your future philanthropic plan now, while postponing the transfer of assets to the Community Foundation until after your lifetime.

Bequest or beneficiary designation. Under these popular options — naming the Community Foundation in your will or trust or as a beneficiary on a life insurance policy or retirement account — you retain the use of your assets or property now while creating perpetual support for your favorite causes after your lifetime. You can change these plans until your death.

Charitable lead trust. This option allows you to create a trust to make annual income payments to the Foundation for several years to build your legacy fund. The balance of the trust is then distributed to your selected beneficiaries.

Give Now, Receive Income For Life

You can create your future legacy fund now by making a gift to the Foundation that provides income for you and/or others for life, then creates an endowment fund to fulfill your charitable objectives after your lifetime.

Charitable gift annuity. You receive a guaranteed, fixed annual payment for your lifetime in return for a present-day gift to the Foundation to create your future legacy fund. You may receive payments immediately or defer them into the future; for example, when you plan to retire.

Charitable remainder trust. You create a trust with your present-day or testamentary gift to the Foundation. The trust provides income to you and/or someone you name for life. Then, at the income beneficiary's death, the remainder of the trust creates your permanent legacy fund.

The Community Foundation of Southern Indiana does not provide tax, legal or financial advice. With any of these giving plans, there may be gift, estate or income tax implications, depending upon your personal financial situation. You should first consult with your tax, legal or financial advisor before making this or any other charitable gift.

The Legacy Society

The Community Foundation of Southern Indiana is privileged to honor those generous people who give back to our community — in their own individual ways — by making a gift in their estate plans. Those listed here have let the Foundation know they have created a future gift in their plans. In many cases, they have then worked with Foundation staff to establish a fund agreement to govern the use of their gift when the fund receives assets from their estate. As a result, these Legacy Society members are assured their wishes will be carried out by the Foundation in perpetuity.

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Mr. and Mrs. John Barksdale
Mr. James H. Becker
Dr. Mathew and Mrs. Jessica
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Mrs. Dora ***** LaDuke
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Dr. Rita Hudson Shourds

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Mr. Laurence P. Wittlig *****
Anonymous Donors (4)

***** Deceased Legacy Donors

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The members of the Board of Directors of the Community Foundation of Southern Indiana assure that the Foundation's resources are used efficiently and effectively to accomplish our vision and mission.

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President and CEO

Melany Wessels
Director of Finance and Operations

Crystal Gunther
Grants and Programs Officer

Linda Abbott
Administrative Assistant

Margaret Brinkworth
Grants and Scholarships Associate



Members of the Community Foundation of Southern Indiana's staff, shown left to right: Crystal Gunther, Linda Abbott, Linda Speed, Melany Wessels, Margaret Brinkworth.



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Confirmed in Compliance with National
Standards for U.S. Community Foundations

Our Vision

To be the partner and trusted resource for philanthropy in our community, providing stewardship of charitable intent so the impact of generosity will last for generations.

Our Mission

To build enduring charitable resources used to positively impact our community by:

- Serving as a partner and resource for donors, their advisors, and not-for-profit organizations
 - Making it simple for donors to fulfill their individual goals in giving back
- Providing stewardship of donor gifts and charitable intent for generations to come
 - Fulfilling a leadership role on important community issues

Our Values

Integrity/Ethical Behavior - Do the right thing every time

Stewardship – Preserve donor intent and charitable value across generations

Excellence – Exceed expectations in all we do

Passion – Love what we do; believe what we do makes a real difference

Leadership – Know our community and its needs; act on that knowledge

Donor Service – Create an environment of personal engagement and fulfillment of charitable wishes for each donor