

Imagine the possibilities

2013 annual report



Community Foundation
of Southern Indiana
Ensuring generosity. Forever.™

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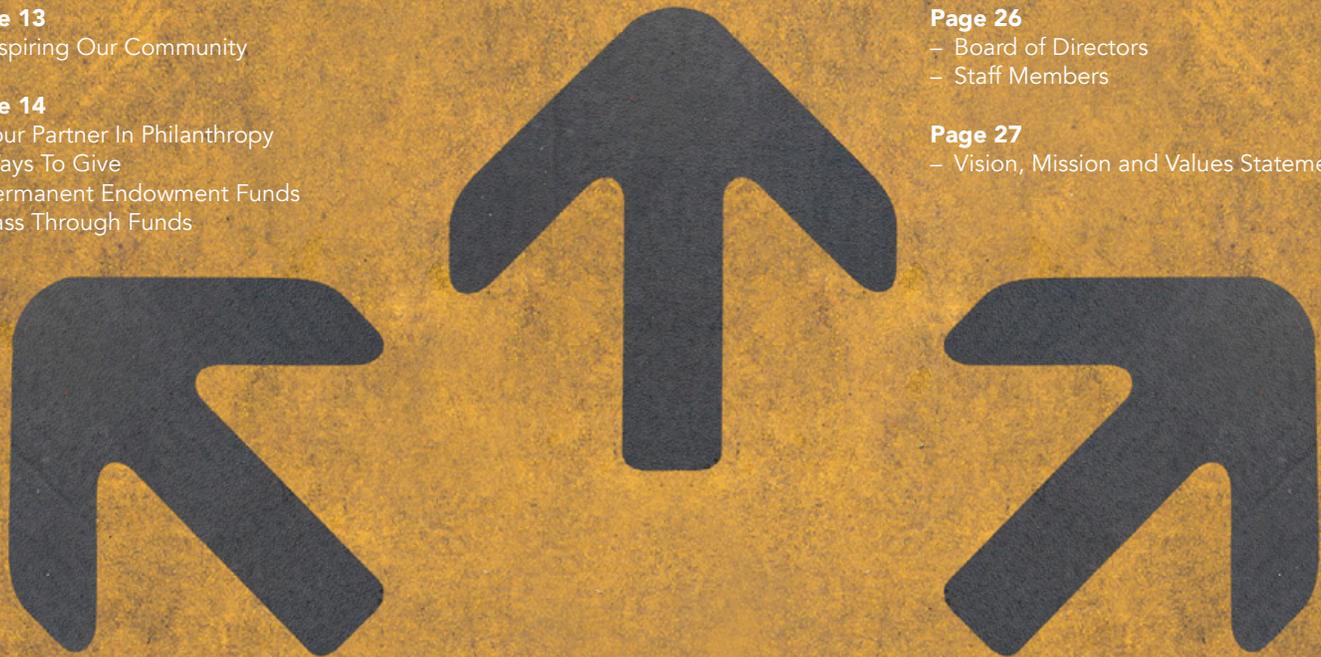
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- Vision, Mission and Values Statement



\$7 million

Imagine the possibilities if the Community Foundation of Southern Indiana could give away an additional \$7 million in grants, every single year, forever.



Dear Friends,

Over the last year you've heard us refer to the endless possibilities that our community could achieve if everyone in Clark and Floyd counties left just 5% of their estate to the Community Foundation of Southern Indiana.

Leaving just 5% of your estate to your personalized, named fund at the Community Foundation, would leave 95% of your estate to your heirs.

And your 5% - added to 5% from everyone in Clark and Floyd counties - would mean an additional \$7 million in charitable funding available for our region within the next 10 years!

With an additional \$7 million, we could:

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

The possibilities are endless. But it takes all of us, working together in unison, to achieve so much.

The Community Foundation of Southern Indiana is here to be your philanthropic partner. We work every day to ensure that your generosity will last for generations and your charitable wishes are carried out the way you intended, forever. Think about what causes you care most about. What are your passions, your interests? Do you want to donate to your alma mater or your church? Would you like to support health and human services organizations or environmental causes or the arts?

Whatever your charitable interests are, we can help you support them, now and forever. Imagine the possibilities if everyone in our community left just 5% to support the causes they care most about. It's incredible to think about the impact we could have on future generations.

As you look through this report and see the stories and names of people who have already taken this step, think about the people you could help. Think about how you want your legacy to inspire others.

If you would like more information, we hope you'll visit www.cfsouthernindiana.com to learn more about the Foundation and how we're working to improve the lives of people throughout Southern Indiana with the help of generous people just like you.

Sincerely,

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

Kevin Cecil
Chair, Board of Directors



The Community Foundation of Southern Indiana joined together with others in our community to forever preserve the Town Clock Church.

Inspiring Our Culture

Southern Indiana is a unique community with a rich heritage. The Ohio River shaped our borders, brought business and industry to our riverbanks and carved a culture steeped in tradition and pride.

Since 1991 the Community Foundation of Southern Indiana has made more than \$507,000 in grants to support the arts, our history and culture. Preserving our history – and who we are as a community – is an important part of inspiring future generations.

The Town Clock Church, located in downtown New Albany, is a treasure that stood as a beacon of hope for fugitive slaves escaping the auction blocks along the Louisville riverfront and the chains of slavery. It was common knowledge that if they could get to the church, whose steeple was visible as they were marched to the Portland wharf, there were people who would help them through the Underground Railroad. The late Dr. Blaine Hudson, a University of Louisville professor and author, called the crossing point between Portland and the church in New Albany “the most important crossing point in the greater Louisville area.”

Over the years the church has faced a number of challenges in preserving its history, and our culture. Can you imagine losing such a wonderful structure and symbol that meant so much to so many? It’s an important part of who we are and what we represent as a community.

To forever preserve the Town Clock Church for future generations, the Community Foundation of Southern Indiana joined together with others in our community to support the efforts to bring this building back to life.

Imagine the history and culture we could preserve for future generations if every Southern Indiana resident left a gift of just 5% of their estate to the Community

More than
\$507,000
in grants have been
made to support the
arts and our
culture since 1991



Foundation of Southern Indiana. It would mean an additional \$140,000 every single year to support projects like the Town Clock Church.

Tomorrow's Education, Today

Writer G.K. Chesterton once said that education is “the soul of a society as it passes from one generation to another.” Today, our community has the opportunity to shape the future of our region through education, and to imagine the soul of society we’re shaping for future generations. Through the generosity of individual donors and the many funds that make up the Community Foundation of Southern Indiana, last year 98 scholarships were awarded to youth across our region to support their continued learning, dictionaries were distributed to every third grader in Clark and Floyd counties, and the Foundation continued to help guide the Youth Philanthropy Council and educate them on the importance of giving back to their community.

Think of our community years from now. How will education influence our children's children? What future do you imagine for our region?

Dr. Rita Hudson Shourds knew exactly the future her mother imagined when she established the Jean Sekora Hudson Educational Scholarship for Women. It is a permanent endowment fund that provides scholarship assistance for females graduating from Springs Valley High School in French Lick, Indiana. This year, and every year, through the fund established by Dr. Shourds, her mother will influence the lives of young women as they work to complete the next chapter of their education.

Last year, over \$375,000 in education support and scholarships from the Community Foundation of Southern Indiana was awarded in Southern Indiana. More than 2,500 dictionaries were distributed to third graders through the Dictionary Project. Can you imagine a community with nearly \$3 million more in education support for our youth? It's possible if we all make the choice to leave 5% to help shape our community through a bequest to the Community Foundation.

Dr. Shourds states, “It was so easy to partner with the Community Foundation of Southern Indiana to honor my mother and her values by setting up a scholarship fund that will last for generations and impact the lives of so many. My mother would have been so happy to know her legacy will live on through this fund and that she is helping shape the future of our region.”



Jean Sekora Hudson



An initiative of the community foundations of
Clark, Floyd, Harrison, Scott and Washington Counties



Education Matters Southern Indiana

Supporting education, providing scholarships, and creating opportunities for our youth is just a small part of how the Community Foundation of Southern Indiana supports education in our region and provides for our future. Increasing our educational attainment – the number of people with a completed form of post-secondary education – is another.

The Education Matters Southern Indiana (“EMSI”) initiative was organized by the community foundations that serve Clark, Floyd, Harrison, Scott and Washington counties in Indiana to strengthen our workforce and improve the economic advantages of our region by increasing the educational attainment of those adults with some form of post-secondary education but no degree or certification.

Research shows that in this five county region, only 25% of the workforce has an associate’s, bachelor’s, or professional degree, compared to 38% nationally. Yet one in four – over 40,000 people – of the region’s adult workers has earned some college credits. Those 40,000 people in our five counties represent an opportunity to increase the economic advantages of our communities, lure new businesses to our region, and enhance the quality of life for this and future generations.

Our goal is to increase our attainment numbers by 25% in the next 5 years (10,000 people). If you would like to help us influence change in our community and support the EMSI initiative please call us at (812) 948-4662. With your help we’ll change lives today and shape the foundation of our community’s future.

Our goal is to increase our attainment numbers by

25%
in the next 5 years





Community Foundation of Southern Indiana staff volunteered to help SOS sort medical supplies before being shipped around the world.

Providing For Our Most Vulnerable

In 2013 the Community Foundation of Southern Indiana granted over \$222,000 to area health and human service organizations. These organizations represent a broad range of services and help thousands of people each year here in our community and around the world.

Supplies Over Seas (SOS) is a nonprofit organization based in Louisville that meets the critical health care needs in medically impoverished communities around the world. SOS works with local hospitals and health care professionals to recover and redistribute surplus medical supplies and equipment that otherwise would end up in landfills.

Since 1993 SOS has distributed over 750 tons of supplies and equipment to 91 countries. With a focus on their future, SOS established an endowment fund at the Community Foundation of Southern Indiana that will forever support their mission.

Any individual or nonprofit organization can establish their own, unique endowment fund to support the causes they care most about. Whether you want to support your alma mater, church, environmental causes, the arts, or your favorite health and human services organization, it is possible through a fund at the Community Foundation of Southern Indiana.

Providing more, and better, care for the most vulnerable will always be a focus of the Community Foundation. Imagine the change we could make here at home and around the world if we each supported the causes we care most about through a fund at the Community Foundation. The Transfer of Wealth study estimates that with your help, we can contribute another \$1,750,000 per year to support our most vulnerable, and we could do it forever.

"SOS is very grateful for the support we receive from Southern Indiana and the entire metro community. Medical providers like Floyd Memorial Hospital, Southern Indiana Rehab, Clark Memorial Hospital, Scott Memorial Hospital, and Harrison County Hospital

750 tons of supplies and equipment to



have donated thousands of pounds of expired medical supplies to support our mission and without the support of volunteers from across the area, it would be impossible for us to impact the lives of so many people throughout the world."

Melissa Mershon, President and CEO of Supplies Over Seas

91 countries





Preserving their memory and values

Honoring a Loved One

The Community Foundation of Southern Indiana is here to support you as you support our community. One way we do that is by preserving your or your loved one's passions and values for future generations by providing an easy and flexible way to support the causes you or they care most about.

Throughout our lifetime we develop beliefs, values, and connections to places and causes which shape the people we are. Honoring a loved one through a personalized, named fund at the Foundation is a wonderful way to take those experiences and passions and use them to impact future generations.

Dr. David Clifton and Ms. Wilma Klein each decided to honor their loved ones by establishing scholarship funds at the Community Foundation of Southern Indiana. Their generosity will inspire future generations of learners and provide the resources to enable them to complete their education and enrich this community. (see opposite page)

If you're interested in supporting the causes you care most about forever or establishing a fund in honor of a loved one, please give us a call at (812) 948-4662.



Dr. David and Kim Clifton

The Clifton Family

Dr. David Clifton is a lifetime educator who has worked in higher education for most of his career. He feels at home in the classroom, helping students throughout Southern Indiana accomplish their goals and realize their dreams. His focus on education and the belief that it is a powerful tool started at an early age. He grew up in a home with parents who believed learning, working hard, and helping others were important values.

When Dr. Clifton's father passed away, he and his wife, Kim, wanted a way to honor his parents' belief that access to education was important for everyone. They called the Community Foundation of Southern Indiana to help them accomplish this goal.



To read more about the Clifton family and the Klein family, and how they honored the lives of their loved ones, please visit our redesigned website at www.cfsouthernindiana.com or scan the code to the left.



Hank and Wilma Klein

The Klein Family

Wilma Klein and her husband, Hank, spent a lifetime educating youth through teaching and volunteer service in Kentucky. The importance of service, hard work, education, and strong values were instilled in them at early ages by their parents. Wilma was a longtime teacher and principal and Hank was a buyer for the Kroger Company with a passion for woodworking.

When Hank passed away in 2011 he left his entire woodshop to the students of Borden High School for their use and Wilma began concentrating on the joint charitable wishes of the couple: creating scholarships for their respective high schools and establishing a scholarship in memory of their parents. She was able to accomplish all of their local charitable goals by working with the Community Foundation.

It is simple to do and no matter what you want to support – religious causes, health and human services, education, green spaces, the arts – *we can help you do it.*



Youth Philanthropy Council

(left to right) Temple Ricke, Jensen Ricke, Major Ricke,
Morgan Ricke, Taylor Ricke

The Youth Philanthropy Council (YPC) is designed to involve youth in meaningful ways, to encourage them to give and serve in their communities and to make philanthropy a habit for the future. Students from high schools across our region join the Council to learn about their community and the value of volunteerism.

In 2013, the YPC learned about the value of community service, philanthropy, and granted a total of \$5,000 to 10 not-for-profits that benefit youth in Clark and Floyd counties. Boys and Girls Clubs of Kentuckiana, Clark County Youth Shelter & Family Services, Hope Southern Indiana, Miles for Merry Miracles, New Albany-Floyd County Consolidated School Corporation, Open Door Youth Services, Rock Creek Community Academy, Voices 4 Youth, West Clark Community Schools, and Youth For Christ all received grants for involving youth in their organizational program planning or implementation.

The Mike and Tammie Ricke family knows a thing or two ... or five about the YPC and the impact it has on youth in Southern Indiana. Each of their five children have been four year members of the Council. Mike said, "YPC was a great program for our children. It gave them the opportunity to meet with peers and discuss regional issues while showing them how service and philanthropy can improve our community. The knowledge they gained from YPC will have a lasting positive impact."

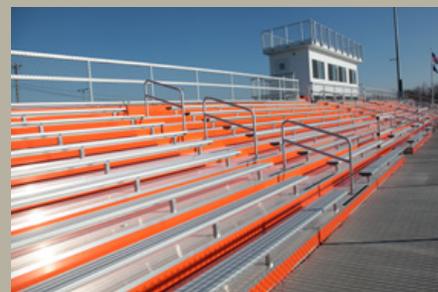
Imagine what impact the Youth Philanthropy Council could have on our community if every Southern Indiana resident left a gift of just 5% of their estate to the Community Foundation of Southern Indiana. It could mean an additional \$700,000 in grants to youth-focused programs in Clark and Floyd counties, every single year, forever.

Inspiring our Community

For years, our community has enjoyed spending time at the soccer fields located off Charlestown Pike in Jeffersonville. Families have spent hours at the fields as children practice and compete in local and regional soccer tournaments.

More recently, the City of Jeffersonville and the Clark County Soccer Association (CCSA) have worked to rebuild the fields in an effort to provide more opportunities for our region's residents, our youth, and to lure visitors from across the country to play on new state-of-the-art fields. During the fall 2013 grant cycle, the Community Foundation of Southern Indiana made a grant to CCSA to help support their efforts as they worked to secure funding for the Woehrle Youth Athletic Complex. Paul Duckworth, President of the Clark County Soccer Association, said, "With the help of the Community Foundation, we were able to produce presentation materials that showed what was possible at our site which, at the time, was undeveloped and hidden under brush and trees. This was a prime factor in securing funding for the project. It's incredible to think what we've been able to accomplish and how much more we can do by working together to better our community."

Inspiring our community takes vision and dedication. With the efforts and leadership of our community we can accomplish incredible things. In the fall of 2014, the Woehrle Youth Athletic Complex will be complete with a number of new soccer fields, two football fields and a variety of new options for families to get out and be active. Imagine how much more we could do by working together and leaving just 5% to the Community Foundation of Southern Indiana so we can keep inspiring our community forever.



The Woehrle Youth Athletic Complex will give new options for families to get out, be together, and be active.

Over **\$73,000**
in community development grants in 2013

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 240 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.

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.

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 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 of all or any part of the fund balance, at any time, to your favorite charitable causes. 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.

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:
<p>I currently support one or more charitable causes</p>	<p>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.</p>
<p>I want to involve my children and my grandchildren in learning to give back</p>	<p>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.</p>
<p>I know the particular charities that I always want to support</p>	<p>Your fund will send annual checks in your name to your selected charities.</p>
<p>I want to help students get an education</p>	<p>A scholarship fund can be customized to benefit students from a particular school, those studying a particular field, or whatever focus you choose.</p>
<p>I want to give back to my community</p>	<p>A Community Endowment fund in your name will support the community's needs now and in the future.</p>
<p>I want to leave a permanent legacy for my charitable interests</p>	<p>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.</p>

2013 Financial Highlights

Total Assets as of December 31, 2013	\$ 27,769,987
Total Gifts in Calendar Year 2013	\$ 1,764,923
Total Number of Gifts	338
Average Amount of Gift	\$ 5,222
Total Grants in Calendar Year 2013	\$ 894,172

Endowed Funds - By Type

Planned Gift Funds	\$ 1,316,230	
Donor Designated Funds	1,340,794	
Field of Interest Funds	1,563,090	
Agency Funds	1,970,419	
Donor Advised Funds	4,559,998	
Board Advised Funds	4,636,565	
Scholarship Funds	7,799,938	

Total Endowed Funds \$ 23,187,034

Non-Endowed Funds - By Type

Board Advised Funds	\$ 3,029	
Donor Designated Funds	6,092	
Agency Funds	25,916	
Field of Interest Funds	70,775	
Scholarship Funds	100,331	
Donor Advised Funds	2,107,585	

Total Non-Endowed Funds \$ 2,313,728

Total Funds \$ 25,500,762

Grants by Purpose

Environment	\$ 2,200	
Recreation	2,500	
Arts and Culture	14,799	
Health	55,902	
Religion	56,861	
Community Development	73,657	
Youth Development	89,250	
Education	116,706	
Human Services	222,583	
Scholarships	259,714	

Total 2013 Grants \$ 894,172

Board Advised Funds

In 2013 the Community Foundation granted more than \$117,125 to 58 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, and 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.

Community Endowment 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
The Mike and Susie Stewart Fund*

This year, with the help of our supporters, the Community Foundation of Southern Indiana created the Operating Endowment Fund. This permanent fund will forever help the Foundation carry out the vision of our donors and support the ongoing operations of the Foundation.

A minimum gift of \$1,000 creates an Operating Endowment Fund named for you. We would like to recognize the following donors who created funds within the Operating Endowment.

Operating Endowment Fund

*Kevin and Cindy Cecil Fund
Cody Family LLC Fund
Mr. Patrick T. Cody Fund
Mr. Shane Cody Fund
Joe and Kathy Jacobi Fund
Jacobi, Toombs and Lanz, Inc. Fund
Mr. and Mrs. R. Gregory Neely 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 \$100,800 in 2013, 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.

Community Endowment Fund Grants Fall Grants Cycle

Arts and Culture

*Louisville Visual Art Association, Inc.
Paul W. Ogle Cultural and Community Center at IUS
Stage One Family Theatre*

Community Development

*Alzheimer's Association
Friends of the Ohio River Greenway, Inc.
Hope Southern Indiana
Keep New Albany Clean and Green
Miles for Merry Miracles
New Albany Floyd County Habitat for Humanity
Southern Indiana Asset Building Coalition, Inc.*

Education

*Boy Scouts of America
Communities In Schools of Clark County, Inc.
Family & Children's Place, Inc.
Family Scholar House, Inc.
Greater Clark County Schools
New Albany-Floyd County Consolidated School Corporation
New Albany-Floyd County Education Foundation, Inc.
Our Lady of Perpetual Help School
Visually Impaired Preschoolers Service of Greater Louisville, Inc.*

Health

*Clark Memorial Hospital Foundation, Inc.
Floyd Memorial Foundation, Inc.
Guerin Inc.
LifeSpring, Inc.*

Human Services

*Blessings in a Backpack, Inc.
Center for Lay Ministries, Inc.
Center for Women and Families, Inc.
Choices for Women Resource Center, Inc.
Dare to Care Food Bank
Down Syndrome of Louisville, Inc.
Hosparus - Hospice of Southern Indiana
Jacob's Well, Inc.
LifeSpan Resources, Inc.
New Albany-Floyd County Consolidated School Corporation
New Hope Services, Inc.
Pleasant Ridge Baptist Church Benevolence
Providence Self Sufficiency Ministries, Inc.
Rauch, Inc.
Spina Bifida Association of Kentucky, Inc.
St. Elizabeth Catholic Charities
St. Luke's United Church of Christ
St. Mark's United Church of Christ
St. Mary's Catholic Church*

Recreation

*Jeffersonville Township Public Library
Southern Indiana United, Inc.*

Youth Development

*Brandon's House Counseling Center, Inc.
Community Foundation of Southern Indiana Youth Count Program
Indiana Grantmakers Alliance - Youth Philanthropy Council
Mount St. Francis Retreat Center
Open Door Youth Services
Our Place Drug and Alcohol Education Services, Inc.*

Additional Grants Made

*Keep New Albany Clean and Green (Town Clock Church)
Waterfront Development Corporation (Belle of Louisville Celebration)
Hand Up Scholarships
Personal Counseling Service, Inc.
The Community Kitchen, Inc.*

Youth Philanthropy Council Grants Spring Grants Cycle

*Boys & Girls Clubs of Kentuckiana
Clark County Youth Shelter & Family Services, Inc.
Hope Southern Indiana
Miles for Merry Miracles
New Albany-Floyd County Consolidated School Corporation
Open Door Youth Services
Rock Creek Community Academy
Voices 4 Youth
West Clark Community Schools
Youth for Christ*

CFSI Fund Listing as of December 2013

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.

Douglas Family Fund *

to support Our Lady of Providence High School and Metro United Way for its Southern Indiana operations.

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.

Family Ark Endowment Fund

to support Family Ark in Jeffersonville, IN.

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.

James H. Becker Designated Fund *

to support St. Augustine Church, the Archdiocese of Indianapolis and the Howard Steamboat Museum.

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 Endowment Fund

to support the charitable economic development efforts of One Southern Indiana through grants to OSI Foundation, Inc.

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.

Personal Counseling Service Fund

to support Personal Counseling Service in Clarksville, IN.

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

Beaman Family Fund *

Betty S. Shine Fund *

Borden Lions Club Foundation Fund

Bryant Family Fund *

Casey, Dora and Sydney LaDuke Family Fund

Clarksville Parks Foundation Fund

David L. McCooe, Jr. Award Fund

Eckart LLC Corporate Advised Fund

The Garmon Family Fund

Gary and Angie Banet Family Fund

George N. and Beverly M. Lane Charitable Endowment 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

Kevin and Natalie Nolan Passthrough Fund *

Larner Family Fund *

Matt and Jessica Bergman Fund

Mike and Susie Stewart Community Enrichment Fund *

Mike and Susie Stewart Fund

The Neely Family Fund

The Neely-LaFollette Family Fund

Ogle Foundation Fund *

The Paris Group Fund

The Reinhardt Family Fund

Rotary Club of Jeffersonville Endowment Fund

S. Butch Shaw Fund

Sam M. Shine 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 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
 IUS/Floyd Memorial Foundation Health
 Careers Agency 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 and 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 and 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 and 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
 Endowment 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 2013, The Community Foundation of Southern Indiana distributed 98 scholarship awards with a combined value of \$259,714. Scholarships offer students an incredible opportunity to continue their education. Some students would not have pursued education beyond high school without these important scholarships and the generosity of our donors. 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.

Scholarship Awards 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 Our Lady of 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 or vocational school.

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 Kiwanis 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 from 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 Awards 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.

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.

\$259,714 in scholarships awarded in 2013

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.

E. G. Read and Margaret Read Scholarship Fund *

Two scholarships are awarded; one for the Edward R. Read, Sr. and Charles Gregory Read Scholarship at St. Xavier High School in Louisville, KY and one for the E.G. Read and Margaret Read Scholarship at Jeffersonville High School in Jeffersonville, IN.

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 Central Student Council Scholarship Fund

Provides scholarship assistance to graduating seniors from Floyd Central High School who are pursuing post secondary education at any accredited four or two year college or university.

Floyd Memorial Foundation/Ivy Tech Scholarship Fund

Awarded to students attending Ivy Tech Community College of Southern Indiana who are currently employed in the health care/hospital field and are studying nursing or other health-related curriculum.

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 students currently employed in the health care/hospital field who are attending Indiana University Southeast and are accepted into an accredited nursing or allied health program.

IUS/Harold Lacy Scholarship Fund

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

IUS/John and Shirley Woehrl 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 attending 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 an education at Ivy Tech Community College of Southern Indiana.

Ivy Tech/Clark Memorial Hospital Scholarship Fund

Awarded to graduates of the Associate of Science in Nursing Program of Ivy Tech Sellersburg for all or any portion of the cost of the NCLEX-RN exam; if any funds available for the fiscal year remain after this use, grants may also defray the expenses of outside entities using the SIM lab at Ivy Tech for employee training; and/or provide scholarship assistance for students studying nursing or other allied health-related fields who take 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.

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 attended Christian Academy of Southern Indiana.

Jean Sekora Hudson Educational Scholarship for Women *

Awarded to females graduating from Springs Valley High School in French, Lick, Indiana, with a preference for members of the Black Hawk Brigade marching band, and attending any two- or four-year college or university in 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.

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 Bixler Memorial Scholarship Fund *

Awarded to graduating seniors from Jeffersonville High School who are athletes in any sport and intend to further their education beyond high school.

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 Charitable Foundation 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 112 applicants to receive full four-year scholarships.



Megan Carter
New Albany High School



Anthony Huber
New Albany High School



Gracynn Jennings
Charlestown High School



Michael Lynch
William W. Borden High School

Professional Advisor Spotlight - R. Gregory Neely

Attorney R. Gregory Neely is a husband, father, volunteer and lifelong resident of Southern Indiana. Throughout his life, Greg has been an active member of our community and his experiences have given him a unique perspective on the role that charitable giving can play in meeting the needs of our region.



R. Gregory Neely

As an estate planning attorney for the Cody & Neely Law Office in New Albany, Indiana, Greg helps people leave a lasting legacy, much like the Community Foundation of Southern Indiana. Greg and the Community Foundation work together to help people who want to create a fund to meet their own charitable needs now, and those who want to leave a gift to their favorite nonprofit, school or church as a bequest that can positively impact that organization for generations. The Community Foundation is uniquely positioned to accept gifts of cash, appreciated stock, insurance proceeds, real estate, and many other types of assets to fund a donor's charitable intent. It's one of the reasons that Greg will often refer clients to the Community Foundation.

"Every person I work with has varying needs, personal values and family situations that can complicate the estate planning process," Greg states. "Working with the Community Foundation of Southern Indiana makes everything easier. Not only do I know that my clients will be well taken care of, but the Community Foundation can accept complex gifts and help me craft sophisticated estate plans that will help my clients achieve their goals. That's why I often refer my clients to the Community Foundation of Southern Indiana and why I've established funds at the Foundation for my family's giving."

Each day, Greg works with his clients to help them accomplish their financial and charitable goals, and in doing so he is helping transform our community for the long term. Imagine the possibilities if everyone in Southern Indiana left just 5% of their estate to the Community Foundation of Southern Indiana. Whatever their vision of the future is, whatever their values and beliefs are, the Community Foundation can design their charitable giving plan to provide for our community and future generations, forever.

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.

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 or their 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 worked with Foundation staff to establish a fund agreement to govern the use of their gift in the future 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.

Legacy Society Members

Dr. Mark D. Allen
Mr. and Mrs. Gary T. Banet
Mr. and Mrs. John Barksdale
Mr. James H. Becker
Dr. Mathew and Mrs. Jessica Bergman
Dr. Glen L. Bonsett
Ms. Ruth Braeutigam +
Ms. Barbara Bunuan
Ms. Arletta Clements
Dr. Claudia Crump
Dr. Timothy M. Ruff & Ms. Laura Hansen Dean

Mr. and Mrs. Michael L. Douglas
Ms. Loretta Ellenbrand +
Dyan and Alan Feller
Mr. Jerry K. Finn
Mr. Darin Fox
Dr. Elsa M. Haddad
Dr. and Mrs. Joe Jacobi
Mrs. Wilma Howard Klein - New
Mr. and Mrs. Robert L. Krall
Mr. Norman Kratz - New
Mr. Casey and Mrs. Dora + LaDuke

Mr. Ray Lewis
Mr. Kevin and Mrs. Natalie Nolan - New
Ms. Maggie Oster
Dr. Malcolm and Mrs. Ruth Ann Peel
Mr. and Mrs. Merrill G. Peter
Mrs. Margaret Read - New
Ms. Donna K. Riley
Mr. S. Butch Shaw
Shashi Shivananjaiyah - New
Mr. Gary L. Shourds and Dr. Rita Hudson Shourds
Ms. Linda S. Speed

Mrs. Alice L. Steele
Mr. Walt Stern, Jr. - New
Ms. Mary Thompson
Mr. Michael D. Waiz
Mr. and Mrs. Robert Walker
Mr. and Mrs. James B. Wathen
Mr. Laurence P. Wittlig +

Anonymous Donors (4)

+ Deceased Legacy Donors

Our Donors

We want to take a moment here to thank each of our supporters and donors. Throughout 2013, we received gifts from many people who support our vision and mission to build enduring charitable resources to positively impact our communities. With your generosity the Community Foundation is able to impact the lives of so many throughout this region. Thank you.

Mr. and Mrs. Jerry T. Adams
Advanced Payroll Systems, Inc.
Mr. Adam Applegate
Mr. and Mrs. James R. Ardrey
Ms. Janelle D. Ashley
Mr. and Mrs. Kenny Bailey
Mr. and Mrs. Gary T. Banet
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Clark County 4-H Adult Leaders
Clark County REMC
Clarksville Community Schools as Agent for
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Mr. Patrick T. Cody
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Mr. and Mrs. Christopher J. Gatz
Mr. and Mrs. Alan Glaubinger
Ms. Kathy Greer

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Kiwanis Club of New Albany Indiana, Inc.
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Mr. Paul Northam
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Mr. James T. O'Neal
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Board of Directors

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.

Board of Directors (who served during FY 2014)

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Members of the Board of Directors, left to right, standing: Pat More, Linda Speed (ex-officio), Helen Bryant, Greg Neely, Tom Hardy, Kyle Ridout, Gary Banet, Leslie Lewis-Sheets, Bill Hanson, Phillip Beaman, Julie Larner, Kevin Cecil. Seated: Andrew Takami, Sue Sanders, Jessica Bergman, Jorge Lanz, Susie Stewart.

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Linda Speed
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Melany Wessels
Director of Finance and Operations



Crystal Gunther
Grants and Programs Officer



Kenton Wooden
Marketing, Communications and Outreach Officer



Margaret Brinkworth
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Aimee Conrad-Hill
Administrative and Database Assistant

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



Community Foundation
of Southern Indiana
Ensuring generosity. Forever.™

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