

# givingmatters



CONNECTING PEOPLE WHO CARE WITH CAUSES THAT MATTER

SUMMER 2015

## Donor Services for Individuals and their Trusted Advisors

Staff at the Community Foundation of Orange and Sullivan (CFOS) can offer resources, guidance and practical assistance when you want to talk about philanthropy. Karen Minogue and Elizabeth Rowley, have extensive experience in the field of philanthropy, and help make giving simple and more rewarding for individuals and families. Many people have not had the opportunity to focus their attention on family wealth planning or charitable goals. We can help you “start the conversation” about philanthropy or “continue the conversation” if you (or your client) has well-defined charitable interests. Remember that there are many advantages to creating a fund at CFOS. Foundation staff handle all paperwork and required IRS reporting, and the Foundation’s 501(c)(3) status offers the highest level of tax benefits for charitable giving.

Contact CFOS today to begin or continue the conversation. We are here to help!

## Greenleaf Legacy Society Reception



From left: Kevin DeHond, Private Client Advisor/Business Development Officer for M&T Bank/Wilmington Trust; Karen Minogue, President and CEO; Tom Rogerson, Senior Family Wealth Strategist for Wilmington Trust; Elizabeth Rowley, Director of Development; Derrik R. Wynkoop, Board Chair.

The Community Foundation’s Greenleaf Legacy Society Event featured guest speaker Thomas C. Rogerson, Senior Family Wealth Strategist at Wilmington Trust. Mr. Rogerson’s more than 30 years of experience in financial services, combined with his family’s long history of philanthropy with the Boston Community Foundation, allowed for a unique and first-hand perspective on life and legacy planning and how to provide abundantly for those you care about while making a powerful impact on charitable causes important to *you*. His discussion was thought provoking for the over 80 guests in attendance on May 28 at the picturesque Eagle’s Nest in Bloomingburg, NY.

Mr. Rogerson recommended that in order to create a strong family unit, families should consider developing a “mission statement” that articulate the family’s values, while recognizing and accepting each other’s communication styles. The absence of these types of activities can lead to a breakdown in intergenerational wealth transfer and disputes between family members.

Professional advisors such as attorneys, accountants and financial planners can be valuable to families, and can help guide strategic discussions. By encouraging strong, cohesive family teams, advisors can help clients create secure financial legacies, and enduring charitable legacies as well. When families talk openly about their goals and expectations, and include multiple generations in decision-making, they may have a better chance of preserving the family’s wealth over generations.

*The Community Foundation can also play an important role in a family’s long-term planning. Establishing a donor advised fund can be an opportunity for the entire family to be involved in grant-making, and “growing” the charitable fund. Families that master the art of giving together, will likely develop a deep devotion to making thoughtful, long-term decisions about family wealth and charitable giving. (See related article on page 2)*

## Scholarship Spotlight

The Alison Klepper Memorial Scholarship was created by Fred and Mary Ann Klepper as a way to honor and celebrate their daughter Alison. In 2003, at just 23 years old, Alison was killed in an accident caused by a drunk driver. Alison was a talented artist and photographer as well as an accomplished skier, snowboarder, surfer and horsewoman. Alison faced adversity, but she never gave up and always looked forward to her next challenge. Alison's greatest talent was helping others in distress, both people and animals.



Alison Klepper

Through this fund, a scholarship is awarded annually to a student at Warwick Valley High School and Orange-Ulster BOCES who plan to major in the field of art.

Alexis Zarow of Warwick Valley High School is the 2015 recipient of the Alison Klepper Memorial Scholarship. She will attend Northeastern University in the fall as a Digital Art and Game Design Major. She looks forward to volunteering at an animal shelter while in college and enjoying all that Boston has to offer. She is also the 2015 recipient of the Ian C. Bennett/ Situation Cares Scholarship which the Community Foundation administers.



Alexis Zarow

## Creating a Lasting Legacy



Oscar B. Greenleaf

Since 1999, the Community Foundation has been here to "do good" for the people of our region and beyond and to honor the goodwill and vision of its many benefactors. Anchored by the vision of our founders, scores of individuals have left a legacy through the Community Foundation that carries on those individual's charitable interests in perpetuity.

The Community Foundation owes a special debt of gratitude to those donors, such as Oscar B. Greenleaf, who have demonstrated the ultimate level of trust by supporting our work through a bequest or planned gift. As a means of expressing that gratitude, and to recognize their generosity, the Community Foundation created the Greenleaf Legacy Society.

The Greenleaf Legacy Society is a way for us to acknowledge our partnership with these special donors and honor their thoughtful gift planning. All those who notify us of a bequest or other deferred gift to The Community Foundation are eligible to be members of the Legacy Society. Members are invited to special events and briefings, and are recognized in Foundation publications, unless they wish to remain anonymous.

If you have any questions about continuing a personal charitable legacy through a gift to the Foundation, please contact Elizabeth Rowley.

## Members of the Greenleaf Legacy Society

*Anonymous (5 donors)*

*Ann Barber Smith*

*Lillian J. Bauer*

*Mary Bratton*

*William J. Bratton, Jr.*

*Joseph Dunwald*

*Anita Feller*

*Ron Feller*

*Mark Fenton*

*Katharine F. Fitzgerald*

*Nicholas Gerten*

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*Mary Williamson*

*Allison Wynkoop*

*Derrik Wynkoop*

## Community Foundation Receives National Recognition

The Community Foundation has received accreditation with the nation's highest standard for philanthropic excellence. The National Standards Board for U.S. Community Foundations™ establish legal, ethical, effective practices for community foundations. "Meeting all of the 500-plus National Standards benchmarks is a rigorous, comprehensive process," said Karen Minogue, President and CEO of the Community Foundation. "This accreditation is a significant accomplishment that says the Community Foundation has demonstrated a commitment to quality, integrity, and accountability; and documented/implemented the highest standards for donor services, investments, grantmaking and administration. The demanding accreditation process provides quality assurance to donors and to their legal and financial advisors."



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# Community Foundation Announces 2015 Honorees

November 18 Annual Reception to recognize

**Rich Rowley & Marianne Murray, and Jeff Bank**



Rich Rowley and Marianne Murray, and Jeff Bank are the 2015 recipients of the **David T. Cocks Award for Commitment to Community** and will be honored at the Foundation's Annual Reception on **Wednesday, November 18, 2015** at Anthony's Pier 9.

From its modest beginnings in 1913, **Jeff Bank** has grown to become Sullivan County's largest community bank, serving every corner of the county with its 12 branches and nearly 135 employees while claiming a 31 percent market share. Not only has Jeff Bank been providing its customers with a high level of banking services over the years, but it has become known as a community leader as well.

The employees of Jeff Bank truly care about the communities which they serve – and it shows. Donating money, collecting food, rolling up their sleeves and getting involved – Jeff Bank's talented group has shown time and again how much they are invested in the community they serve and how much they want it to succeed.

Each year Jeff Bank contributes over \$70,000 to many Sullivan County nonprofit organizations, including American Cancer Society, Bethel Woods Center for the Arts, the Center for Discovery, Sullivan ARC, Catskill Art Society, Heart-A-Thon, Sullivan County Community College, and Town of Walkill Boys & Girls Club.

**Rich Rowley and Marianne Murray** are truly committed to making the Hudson Valley a better place to live, work and raise a family. Their tremendous support of local organizations has impacted the lives of thousands of children and adults throughout the region.

Marianne is the founder of Carve for a Cause, an organization that celebrates the fall bounty of the region and raises funds and awareness for local and diverse not-for-profit initiatives. Since inception in 1999, Carve for a Cause has distributed over \$300,000 to nonprofits helping meet critical unmet needs for families and children. Each fall, this annual event brings together over 450 people for a day of good old-fashioned family fun - all while giving back to the community.



Marianne Murray & Rich Rowley

Rich's leadership continues to leave a lasting legacy on the community in many ways including establishment of the Middletown High School Academy of Finance program and scholarship and development of the Orange Open Golf Tournament which benefits the Orange County Chamber of Commerce and the United Way. Most recently, Rich served as the chair of the "Defining Moments" campaign at SUNY Orange, which raised \$25.1 million to enhance and expand the Middletown and Newburgh community college campuses.

Together, Rich, Marianne and the Rowley family have immersed themselves in civic and community initiatives. Their loyal support and willingness to lend a hand to variety of worthy projects has made a true difference in our community, now and forever.

**Save the Date!**  
**November 18, 2015**

For Sponsorship Opportunities:  
[Elizabeth@cfosny.org](mailto:Elizabeth@cfosny.org)

*Thank you to our generous  
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(as of 6/30/15)*

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THE BRATTON  
FAMILY





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**Our mission** is to enable charitable individuals and organizations to become meaningful donors by providing trusted support and expertise for their contributions to make a difference in our community, now and forever.



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Secure on-line donations may be made at any time on the Foundation's website: [www.cfosny.org](http://www.cfosny.org)

If you are interested in making a donation by check, or just want to know more, please *clip and mail* this section to us:

- Send me more information about the Community Foundation and how to create a donor fund, or make a tax advantaged gift.
- Send me more information about how to create a deferred fund through a charitable remainder trust, a life insurance policy, will, bequest, or life estate. I am interested in becoming a member of the Community Foundation's Greenleaf Legacy Society.
- I want to become a Member of the President's Circle and support the general operating expenses of the Foundation. Enclosed is my annual gift of \$1,000, \$2,000, \$5,000, \$\_\_\_\_\_. A donation of any size is appreciated.
- I'm including a donation for \$\_\_\_\_\_ to be deposited into the \_\_\_\_\_ Fund at the Community Foundation.

Name (Please print): \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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