



Amery
COMMUNITY FOUNDATION



CONNECTING PEOPLE WHO CARE
WITH CAUSES THAT MATTER...

FOR GIVING. FOR GOOD. FOR AMERY.



THEY WERE WALKING ALONG THE GRASS AND SHE SAID,
“GRANDPA, WHO BUILT JORGENSEN MEMORIAL FIELDS?”

HER GRANDFATHER KNOWINGLY ANSWERED
THAT IT MUST HAVE BEEN SOMEONE WHO
CARED AND LOVED DEEPLY FOR CHILDREN.

AND THEN SHE REPLIED,
“WASN’T THAT NICE, BECAUSE NOW WE
HAVE SOMEWHERE TO PLAY.”



An affiliate of the St. Croix Valley Community Foundation

608 Harriman Avenue S. • Amery, WI 54001

www.amerywisconsin.org

715.386.9490

For more information please contact a Board Advisor or call the
St. Croix Valley Community Foundation at 715.386.9490

Photos courtesy of Jerry Boucher, Interfaith Caregivers, Erik Wojchik

WHAT IS A “COMMUNITY” FOUNDATION?

We are a community foundation, a tax-exempt public charity that enables people like you to establish charitable funds. Your fund will be commingled with our other funds and managed professionally. Its assets will grow over time. You and your family and colleagues are encouraged to continue giving to the fund to help it grow even more. Grants will be awarded from your fund to support local non-profit organizations, in accordance with your interests.

Like all community foundations, we are overseen by a volunteer board of leading citizens and run by professionals with expertise in knowing our community's needs. We go beyond simply making grants that advance charitable activities: we also identify current and emerging issues, stimulate resources to address those needs, and help our region prepare for the future.

It's for these reasons that community foundations represent one of the fastest growing areas of philanthropy. When charitably minded people like you seek ways to give, we can help you make a difference.



AMERY COMMUNITY FOUNDATION BOARD OF ADVISORS

L-R: Bruce Johnson, Paige Williams, Karen Krupa, Sally Klevgard, Ray Siggins, MaryLou Stanley, Margee Lien, Joyle Anderson, Dan Lien & Larry Riemenschneider;
not present: Margo Rosen, Larry Demers, Dan Draxler, David Erspamer



“WHAT A MAN DOES FOR HIMSELF DIES WITH HIM.
WHAT HE DOES FOR HIS COMMUNITY
LIVES LONG AFTER HE IS GONE.”
-- THEODORE ROOSEVELT

AMERY COMMUNITY FOUNDATION MISSION STATEMENT...

It is the goal of the Amery Community Foundation to enhance the quality of life in the Amery area and all of Polk County. We hope to do this by encouraging the establishment of endowment funds to serve the local community now and in the future by providing leadership and resources.

As a public charity we can offer our donors maximum tax advantages. At the same time we can accommodate special concerns of the donor.

Projects we have funded recently include:

- | | |
|--------------------------------|---------------------------|
| Amery Centennial Hall | Amery Hockey Arena |
| Books for Babies | The Haven |
| Interfaith Caregivers | Indianhead Chorus |
| Jorgenson Field | Skateboard Park |
| Youth in Harmony | WPCA Radio |
| Amery School Scholarships | Habitat for Humanity |
| Polk County Historical Society | Amery Area Public Library |

If you are interested in becoming a donor, please contact a Board Advisor to obtain information.

HOW IT ALL BEGAN...

The Amery Community Foundation was founded in 1984 by the City of Amery, Amery community organizations and concerned citizens as a community trust. Its purpose was to afford individuals the opportunity to make lasting, flexible gifts to meet the needs of residents in the Amery area. A volunteer board of local leaders and concerned citizens, representing the interests of the Amery area, governs the Foundation's administration and distribution of funds. The generosity of donors, the vision of our Foundation, and the dedication of our Board are what enable the Amery Community Foundation to continually respond to the changing needs of our community.



The Amery Community Foundation is an affiliate of the St. Croix Valley Community Foundation which was established in 1995 to serve donors and support the quality of life in the St. Croix River Valley. As an affiliate whose funds are invested and managed by the St. Croix Valley Community Foundation, the Amery Community Foundation continues to assure donors that gifts made today will be professionally managed, and used wisely and effectively to enhance community well-being in the future.



NURTURING QUALITY
LIVING THROUGH GENEROUS
GIVING.

THE COMMUNITY FOUNDATION ACCOMPLISHES ITS MISSION BY...

- Building a community of donors.
- Offering donors simplicity and flexibility in charitable giving.
- Accumulating, managing, and growing the endowed funds wisely.
- Initiating, promoting and supporting ways which stimulate the further development of our community's quality of life.



WAYS TO GIVE...

We offer a variety of funds to address needs which are multidimensional, long-term and community-wide in scope and that meet the charitable interests and needs of donors.

These include:

- Unrestricted Funds
- Field-of-Interest Funds
- Donor Advised Funds
- Designated Funds
- Project Funds
- Scholarship Funds
- Agency Funds

DONORS — MAKING THE DIFFERENCE...

The Amery Community Foundation believes no gift is too small. We welcome donors from all walks of life and we feel that giving back should not require great wealth.

The Community Foundation offers a number of ways to ensure your charitable goals are met, while maximizing your tax benefits. We also enable you to provide ongoing support to your favorite organizations, involve your entire family in the giving process if you wish and allow you to leave a legacy within the community.

Establishing a Fund with the Amery Community Foundation is a great way for you to give back to your hometown. We are here to help you with all aspects of your charitable giving. A Board Advisor is available to speak with you at your convenience. Please call one of our Board Advisors to set up your appointment today. It is easy to make a difference, let us show you how.



“YOU MAY NOT BE ABLE TO HELP THE
WHOLE WORLD BUT YOU CAN MAKE A DIFFERENCE IN
YOUR OWN COMMUNITY.”
—ELIZABETH P. CARTER

CREATING A LASTING LEGACY...

Nettie (Hayes) Mooney, originally from Clear Lake, WI and John Mooney, from Amery, WI, met and married in 1940. They then moved to Chicago, IL and later to LaCrosse, WI, where Nettie now lives. In 1996 while visiting Amery, John and Nettie saw that the Amery Area Senior Center needed a larger facility, so they donated money for a new one. John passed away in 1996. John and Nettie Mooney created a lasting legacy and you can too.



THE IMPACT OF GIVING...

Interfaith Caregivers of Polk County “Neighbors Helping Neighbors”

Funding from the Amery Community Foundation allows Interfaith Caregivers to recruit volunteers to assist elderly and adults with disabilities to maintain their independence. Our caring volunteers provide rides, friendly visits, chores and other non-medical services to Polk County residents at no charge.

Interfaith Caregivers thanks the Amery Community Foundation for helping us share the “Gift of Independence.”

Amery Area Senior Center

The Senior Center, being one of the largest in the state of Wisconsin and the largest in this area, provides activities, education and companionship to active adults and seniors.

With the generous donation from the Amery Community Foundation, we are able to make a difference in the quality of the programs and activities we offer. We appreciate what the Foundation is able to do for the Senior Center and how that support helps so many others. This is a great way for people to give back to their community.



“THE FOUNDATION IDENTIFIES PROJECTS THAT HAVE A LASTING IMPACT. THESE ARE MY VALUES, TOO...LEAVING A BEQUEST FOR AMERY THROUGH AMERY COMMUNITY FOUNDATION FEELS GOOD TO ME.”

—JOHN MOONEY

HOW TO GIVE...

Decide when to give - donations to the unrestricted fund and creation of separate funds can take place now, be established in your will, or created through a trust arrangement that benefits your family as well as charity. You may give in honor of an anniversary, to celebrate a special event or to support a cause. Tax deductions are earned at the time of your gift to the fund, while grants awarded from the fund may be immediate and/or continue into the future.

Decide what to give - almost any kind of asset can be used to start a fund or make an unrestricted fund donation. These can include gifts of cash, publicly traded securities, closely held stock, interests in limited partnerships, real estate, life insurance, bequests, tangible personal property and private foundation assets.

Choose the purpose or intent of the fund - we offer a variety of fund types that are flexible to meet your different charitable interests and reflect your values.

Choose the name of the fund - if you decide to create a separate fund, it can be named for the donor, the donor's family or as a memorial to someone special - certain requirements apply. Every grant from the fund will carry this name. If you prefer anonymity, you may choose a name that reflects the fund's charitable purposes.



“IN ADDITION TO CONTRIBUTING A SIGNIFICANT AMOUNT OF FUNDING TOWARDS THE JORGENSEN MEMORIAL FIELD PROJECT, THE AMERY COMMUNITY FOUNDATION ALSO PROVIDED A CONVENIENT ACCOUNT FOR ALL TAX-DEDUCTIBLE DONATIONS RECEIVED. THE AMERY COMMUNITY FOUNDATION MADE THE GOALS OF THIS PROJECT EASILY ATTAINABLE!”

—ERIC WOJCHIK, PROJECT CHAIRMAN
JORGENSEN MEMORIAL FIELD

GIVING OPTIONS...

The money managed by the Amery Community Foundation for philanthropic purposes is grouped into endowed and non-endowed funds. These funds reflect the interests of the donors and help us to fulfill our objective of making philanthropy easy for all. Whether your fund is endowed or non-endowed depends on your purpose or charitable interest.



ENDOWED FUNDS - Those funds in which the principal is held forever and the income earned each year may then be used for granting purposes. The definition of “earnings” may be defined by the Foundation’s spending policy, investment policy, or the fund agreement.

NON-ENDOWED FUNDS - The entire amount given into these funds is available for grant recommendations at any time to projects and organizations in the Amery area. Non-endowed funds act as a convenient charitable account for the donor or for a group of donors.



OUR GIFT WILL KEEP ON GIVING FAR INTO
THE FUTURE. IT'S EXCITING TO THINK OF
THAT KIND OF IMPACT...

TYPES OF FUNDS THAT CAN BE ESTABLISHED OR GIVEN TO...

UNRESTRICTED FUNDS - these are the general funds for the community. They offer the broadest giving option, allowing grants to be made to local non-profits. The Amery Community Foundation has a grants committee comprised of members of the Board of Advisors.

FIELD-OF-INTEREST FUNDS - these are funds that meet a particular field or issue area that is of interest to you, such as emergency services or environmental concerns.

DONOR-ADVISED FUNDS - these funds enable you to recommend specific organizations to receive grants and you can take your time to decide where you want your gifts to be directed.

DESIGNATED FUNDS - these funds support specific organizations while we make sure that grants to these groups remain relevant over time and responsive to changing circumstances.

PROJECT FUNDS - these are funds for activities of community groups. This fund type is used when the Foundation agrees to be a fiscal sponsor or to hold funds for a special project. This fund type is almost always classified as pass through and requires an application process for review by Amery Community Foundation.

SCHOLARSHIP FUNDS - these funds help students pursue academic goals. You may define guidelines for candidacy, the advisory committee, and the school.

AGENCY FUNDS - these funds are established by nonprofit organizations to provide income to them. We handle all administrative and investment responsibilities, freeing the organization to pursue its charitable mission.



THE AMERY COMMUNITY FOUNDATION IS COMMITTED TO BENEFITING AND ENHANCING THE QUALITY OF LIFE FOR AMERY RESIDENTS BY SUPPORTING ENVIRONMENTAL, EDUCATIONAL, HEALTH AND YOUTH RELATED PROJECTS.

TAX BENEFITS OF GIVING...

The end of the calendar year is a time when many people consider the benefits of making charitable donations in order to maximize tax savings. Regardless of your income, if you itemize deductions on your tax return you can almost always lessen the amount you owe. For those who want to sell appreciated stocks or other securities, you make take the tax deduction immediately and give the proceeds to the Amery Community Foundation. The tax benefit from the charitable donation may further offset any other capital gains.

If you would like to make a contribution and receive a charitable income tax deduction this year, but can't afford to give up the income from a particular asset, consider a life-income gift - such as a charitable remainder trust, a charitable lead trust or a charitable IRA rollover. Based on your age and IRS calculations, you could receive income for life for yourself and/or another individual, and receive a charitable income tax deduction as well.

If you have a vacation home or other real estate you are not using, plan now for a gift of the property next year and you may not only avoid any capital gains tax, but also receive a charitable deduction for the property's full fair-market value. The decision ultimately depends on each individual's particular financial and tax situation. Contact your tax advisor to determine what will work best for you. If you have questions about making gifts or how to set up a gift to provide a steady income stream plus tax benefits, contact us at the Amery Community Foundation.

GIFTS OF STOCK...

Appreciated stock is usually the smartest gift. By contributing stock to your fund at the Amery Community Foundation, you avoid capital gains tax and still receive the full market value of the gift for tax purposes. Stock transfers normally take only a couple of days but may take longer at the end of the year due to the large volume of transactions being processed by brokerage and investment firms. To count as a charitable income deduction, gifts of stock must be received before the close of business on December 31.



MUTUAL FUND SHARES...

Contact the Amery Community Foundation to get the easy transfer instructions. All mutual fund shares require about 3 weeks to transfer to the Amery Community Foundation, so start now if you plan to gift mutual fund shares. Gifts of mutual fund shares provide the same tax benefits as stock gifts. To count as a charitable income deduction in the current year, gifts of mutual fund shares must be received before the close of business on December 31.



A STRONG COMMUNITY FOUNDATION IS A
CORNERSTONE OF A SOLID COMMUNITY.”

—JOHN MOONEY

APPLYING FOR COMMUNITY FOUNDATION SCHOLARSHIPS...

Are you a dedicated student? Aspiring athlete? Talented musician? Do you plan to attend a technical school, community college or a four-year institution, but worry about how you are going to pay for your education?

The Amery Community Foundation has been providing financial assistance to area students for nearly a decade. In an effort to increase educational opportunities, we offer an array of scholarships that support students of a variety of backgrounds, ages, educational goals and economic status. The Amery Community Foundation's scholarship program has helped 408 students attend college since 1984. We have awarded over \$270,000 in grants and scholarship support to local individuals, reducing the burden of college tuition. Shouldn't you or someone you know apply for a scholarship today? If so, contact your local high school guidance office for an application.



APPLYING FOR A GRANT...

The goal of the Amery Community Foundation is to strengthen our community by supporting needs and opportunities in arts and culture, community betterment, education, health, and human services. Grant requests are accepted from nonprofit organizations that are recognized as exempt under Section 501(c)(3) of the IRS Code. Applicant organizations must operate in Polk County. Applications are reviewed and evaluated by the Grants Committee comprised of Board members and volunteers from the area. To download a grant application, visit us at www.amerywisconsin.org.

Questions? Please contact us for more information.



“YOU MUST GIVE SOME TIME TO YOUR FELLOW MEN.
EVEN IF IT’S A LITTLE THING, DO SOMETHING FOR
OTHERS - SOMETHING FOR WHICH YOU GET NO PAY
BUT THE PRIVILEGE OF DOING IT.”
—ALBERT SCHWEITZER

 *Amery*
COMMUNITY FOUNDATION



WE MAKE A LIVING BY WHAT WE GET,
WE MAKE A LIFE BY WHAT WE GIVE.
— SIR WINSTON CHURCHILL