



HERITAGE FUND

The Community Foundation of Bartholomew County

www.heritagefundbc.org

538 Franklin St. • Columbus, IN • 812-376-7772

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Heritage Fund
welcomes board members
Brad Davis, Johnnie
Edwards, Katie Glick,
Aida Ramirez and
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WE WANT TO



OUR DONORS

NOT long ago I returned home at the end of a long day to find more than 100 service flags planted in my front yard. Other than looking ridiculous, I had no idea why they were there or how long I needed to "host" them. A few days later, a work crew appeared to begin digging, giving me my chance to get some answers. Turns out the head guy was very informative and forthcoming, even when I complained about no one ever picking up the flags when the work was done. Long story short, later that day when the work was finished — every single flag had been removed! I was surprised and absolutely delighted. I even spent an hour trying to figure out how to get a compliment logged in their system on behalf of this employee.

Later reflection got me thinking that being delighted with an interaction — personally, professionally or in the community — is altogether too rare. And about

how much I want each and every Heritage Fund donor to be delighted with the service we provide — after all, making a charitable donation should be fun ... or at least feel good.

So, I am proud to launch a new framework: Your Philanthropy. Your Way. Heritage Fund wants to help each donor be a philanthropist in the way she/he wants to help improve the world, and we want you to be delighted! Take a look inside at the ways we can help tailor your philanthropy to fit your interests, timetable and pocketbook.

And let us know how we are doing. We want to wow you!



Warmest regards,

Tracy
Tracy H. Souza
President & CEO



SCHOLARSHIP NEWS: Lilly Scholars & Brown Winners

Congratulations to our 2021 Lilly Scholars: Columbus Signature Academy — New Tech seniors Hayley Barr and Jodi Miller.

As Lilly Scholars, the two will receive full tuition, required fees and a special allocation of up to \$900 per year for required books and equipment for four years of undergraduate study at the accredited Indiana public or private nonprofit college or university of their choice. Scholarship applicants were evaluated on a finalist interview; academic performance; scholastic activities, community involvement and employment; leadership; financial need; written responses; two recommendations; and a finalist interview.

Congratulations to the winners of our 2021 Brown Music Competition virtually hosted from First Christian Church: Columbus North High School senior Minjung Kim and Columbus East High School senior Reagan Lykins.

Kim, playing violin, won the Betty F. Brown Awards for Instrumental Excel-

lence, performing "Symphonie Espagnole" by Lalo. Lykins, a mezzo, won the Anna Newell Brown Awards for Vocal Excellence, singing "Spiagge Amate" by von Gluck and "Over the Land is April" by Quilter.

Both students will receive a \$3,500 scholarship award.

The Anna Newell Brown Awards for Vocal Excellence were established through Heritage Fund in 1985 by Robert and Betty Brown to honor Robert's mother, Anna Newell Brown. She was a distinguished vocalist and contributed greatly to the cultural life of the community.

The Betty F. Brown Awards for Instrumental Excellence were established by Robert in 1992 in memory of Betty, who was a well-known and highly respected advocate and patron of the arts, both locally and statewide.



HAYLEY
BARR



JADI
MILLER



MINJUNG
KIM



REAGAN
LYKINS



TAKE A LOOK!

Have you visited
our new website?

heritagefundbc.org

At Heritage Fund we know that everyone has a different approach to giving, and we want to help you feel good about supporting the causes that matter most to you. HFBC offers many ways to support your local community through philanthropic giving. We accept gifts of all sizes that support a variety of organizations and causes.

Whether you want to make a one-time gift to the community, remember or honor a friend or loved one, include a special cause/nonprofit or religious institution in your estate plan or start a fund that will support these causes now and in the future – HFBC wants to help you achieve your philanthropy your way. Donors may choose to support an existing fund or start one of their own.

HFBC endowments offer donors the opportunity to invest their charitable dollars for long-term benefit. All of our endowments exist in perpetuity and provide annual grants for the organizations and causes selected by donors.

Here are some of the different fund types we offer and examples of each:

YOUR PHILANTHROPY.
YOUR WAY.



Support a specific organization or cause, including local or national nonprofits, an alma mater, religious institutions, etc. These funds are a great option for donors who support one or more organizations each year and want to ensure that organizations continue to receive support now and in the future.

FUND EXAMPLE: Peyton's Make-A-Wish Fund

Established in 2021 by Landmark Farm Foundation, this Designated Fund provides support to the Make-A-Wish Foundation by granting "wishes" for Bartholomew County children suffering from a critical illness.

WHAT DONORS ARE SAYING: *"Heritage Fund is a well-respected organization. With their diverse areas of support for the community there is something for everyone. We saw a need in our community to help every child with a critical illness to be able to take some time with their family and enjoy something they have wished for. Our family has unfortunately been one of those families affected in this way. As we considered a way to set up an ongoing fund to support a charity dear to our hearts Heritage Fund made it easy to do. Make-A-Wish goes above and beyond to open doors and allow for exceptional experiences for every child. Peyton's Make-A-Wish Fund will allow us to put things in place to support kids in Bartholomew County who qualify for a Wish trip."* — John Whittington

An endowment started by an organization's board of directors to provide an annual source of support in perpetuity. Once established, an agency may continue to add funds over time or direct donors to consider a gift to the endowment as another means of supporting the organization.



FUND EXAMPLE: Children Inc. Learning Center Endowment Fund

Established in 2020 this Agency Fund supports ongoing operations and future growth

WHAT DONORS ARE SAYING: *"We like the collaboration we have experienced with the team at Heritage Fund. Children Inc. Learning Center is proud to work with kids and families from every socioeconomic group that come from diverse, ethnic backgrounds, and we see this partnership with Heritage Fund as such a great fit!"* — Donnie Ritzline, Children Inc. Board of Directors



A great option for donors with a variety of charitable interests. Donors control the organizations and causes that they want to provide grant funding to each year, and funds exist in perpetuity.

FUND EXAMPLE: Robert N. Brown Fund

Established in 2006 by Robert's four children, this Donor Advised Fund honors his love of family and community and his gifts of optimism, learning and independent thinking.

WHAT DONORS ARE SAYING: *"My siblings and I wanted to honor my father's memory with a fund set up to target the advancement of education in the technical trades within the greater Columbus area. Instead of trying to set this up on our own, Heritage Fund supplied us the template and admin services to seamlessly put together a fund that accomplishes this mission. Heritage Fund also keeps us plugged into the current issues and needs in our focus area. This is not something we could have accomplished using a charitable trust with a larger national firm."* — Jeff Brown



NEW FUND OPTION NOW AVAILABLE

For donors who want to practice strategic philanthropy at the highest level.



Personal Foundations engage donors by allowing them control and flexibility over their grant-making while providing the opportunity to invest in the future and progress of the community and/or the causes most important to them. Personal Foundations are a great option for donors who want to grow their philanthropic impact and avoid the cost, administrative burden and funding restrictions of a private foundation. Personal Foundations also can be branded to the donor's personal preferences.



Support causes important to donors but not limited to grants to a specific organization. Currently HFBC holds Field of Interest funds that benefit the arts, youth, animals, equity, women's issues and more.

FUND EXAMPLE: Hawcreek-Flat Rock Area Endowment Fund

Established in 2002 by concerned citizens this Field of Interest Fund provides grants that benefit projects specifically in the Northeast corner of Bartholomew County, including Hope. An advisory board of area residents receives grant requests and makes funding decisions based on changing needs. This fund reached \$1 million in 2020, thanks to the kindness of donors, the hard work of the advisory board and a generous match proposed by former resident and longtime donor Tim Andrews.



WHAT DONORS ARE SAYING: *"We grew up without much in terms of material goods. But I was nurtured by kind, caring people who gave from their hearts, expecting nothing in return: teachers, neighbors, community leaders, relatives, friends. I've grown to believe that giving to others is best when you have no expectation or need of anything in return. While I no longer live in the Hope area, contributing to the Endowment Fund, and encouraging others by matching their gifts, is my way of showing how much I still care for those communities that helped me so much growing up in St. Louis Crossing."* — Tim Andrews, Donor



WANT TO LEARN MORE?

Contact us for more information on ways to give and a complete listing of all our charitable funds.
heritagefundbc.org | 812-376-7772



Allows donors to assist students to achieve their education goals. Donors decide on the criteria that will be used to select the award recipient.

FUND EXAMPLE: Casey Fiske Memorial Scholarship

Established in 2019 by Chris & Shannon Clulow in memory of Chris' grandfather, this Scholarship Fund helps students in Bartholomew County pursuing postsecondary education. The scholarship criteria includes applicants' demonstration of how a grandparent or other non-parental adult has had a positive impact on their life.



WHAT DONORS ARE SAYING: *"I enjoy working with Heritage Fund as it is an organization I trust. I have always wanted to do something to honor my grandfather, Casey Fiske, and establishing a scholarship in his name seemed like the best idea. He taught me to be a giver in life, and he would love what Heritage Fund is doing for the community."* — Chris Clulow, pictured with Casey



ALWAYS AN OPTION: GIVE TO EXISTING FUNDS

Heritage Fund has more than 250+ existing funds that support a specific organization, cause or scholarship. Donors can call our office or search online for a fund that meets their charitable interests. Also keep gifts to our **Community Fund** in mind — they help celebrate our community by giving back to projects, programs and organizations that improve the quality of life in Bartholomew County.



MEMORIALS & HONORS

A tribute gift is an ideal way to remember or honor someone special and give to Heritage Fund

November 1, 2020 — January 31, 2021

MEMORIALS

Lowell Anderson

Dortha Anderson

Don Bailey

Katherine Bailey

Alex Barkes

Donna Bottorff

Beverly B. Belush

Richard Belush

Jesse Bernard

SIHO Insurance Services

Patrick Bowman

Rick & Judy Bowman

Jason & Stephani Hoy

W. Calvert & Betty Brand

Jess Brand & Geri Handley

John & Sally Brand

Michael Brock

Sonnie Brock

John Carmichael

Brad & Julie Davis

Liam Carter

Katherine Connor

Joshua Chasteen

Daniel & Melissa Vermillion

Merrill Clouse

Lori Wells

Merrill & Norma Clouse

David & Tammy Clouse

Lori Wells

Tammy Fay Clouse

Russell & Diana Burton

Jimmy & Sharon Cheek

Imogene Emmert,

Marty & Pam Emmert,

Dan & Anita Burton

Tom R. & Cheryl Finke

June Gilliland, Nancy

Berkenstock, Joyce Garrison

& Family, Don Gilliland

& Family, Lisa Garrison

& Family

Nancy J. Gilliland

Debbie Hatton

Bud & Ann Herron

Stephen & Jolene Lortz

Pamela May

Patricia May

Chuck & Kim Ray

John & Shirley Robertson

Judith Robertson

Margaret C. Rominger

KA Coffman

James Coffman

Joyce Heckman

Wayne Crippen

Mary Jane Crippen

William K. & Ann

Mohr Daniel

John R. Mohr & Natalie

J. Mohr

Dear Friends which we have lost this year

Betty deHebreard

Judy Shepherd

Diesel

Amy Laker

Don Dillman

James & Linda Anderson

Perry & Millie Doup

Diane Doup

Dianne & James

Farrar's Parents

Dianne & James Farrar

Lois Friend

Sharon Wagner

Emma Hogue Frost

Carol Phillips Wright

M. Jane Frost

Carol Phillips Wright

William Hogue Frost

Carol Phillips Wright

Abbott Forrester Garn

Mary Ellen & John Wyman

Goldie Gibson

George & Marie Napier

Mary Glasson

Pamela May

Patricia May

Charles & Ro Whittington

Myron Glick

Jerry & Mary Williams

Claire Feucht Gregory

Glory Kulczycki

Chuck Grimes

Jim & Norma Coleman

Justin Hilber

Robin Hilber

Norma Jean &

Leon Hitchcock

Retha & Ed Claypool

Dr. William Owens Hogue

Carol Phillips Wright

Evans & Mary Jane Hoeltke

Jim & Bev Pence

Sgt. Jonathon

Michael Hunter

Thomas & Mary Aton

Theola Inez Hunter

Nancy Young Gevecker,

Mark Kalstrup, Jim

Gevecker, Deb Kalstrup

Kelle Imlay

Buck & Carolyn Imlay

Shirley Lee Folger King

Sarah Cannon

Hoagie Laker

Amy Laker

Mindy Lewis

Mary Harmon

Lexie

Christina Newell

Robert & Peggy May

Pamela D. May

Patricia D. May

Julie McKinney

Ann Hedrick

Yvonne McPeck

Daniel & Melissa Vermillion

Rick Merkel

Dave & Susan Barker

John Morrison

Dennis & Alma Gommel

Don Munn

HFBC Team

Nala

Kayleen Leonard

Angie & David May

Donna Virg

Linda O'Connor

Pia O'Connor

Dan A. Olson, D.D.S.

Marlen Chestnut Turner

Oliver

Suzie & Charles Rentschler

John & Betty Pence

Jim & Bev Pence

Tony Pottorff

James & Suellen Gillespie

Jackie Robinson

Johnnie Edwards

Dennis Roberts

James & Lynette Farless

Rick & Elizabeth Stoner

Marilyn Schwartzkopf

Judy Shepherd

Brenda Shaw

Joyce Heckman

Sherlock

Trisha Keller

Marjery Stollings

Tom & Barbara

Schoellkopf

Tessa

Christina Newell

Ida Trapp

John & Debbie Burnett

Verna Webb

Dennis & Alma Gommel

Carol Wiseman

Daniel & Melissa Vermillion

HONORS

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Katherine Connor

Sneha Balanaga

Katherine Connor

Nancy & Henry Schacht

Judy Shepherd

Savithri Senthilnathan

Katherine Connor

Matt Souza

Sherm & Jacquie Franz

Tracy Souza

Lee Hamilton

Robert & Laura Stafford

Ann Hedrick

Sherry Stark

James K. Risk, III/

Kirby Risk Corporation

Alta & Don Stevens

Anonymous

Craig & Joni Stevens

Anonymous

John & Cheri Stevens

Anonymous

Bill Stewart

Ilya Schwartzman

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Patrick Sabo & Mary Stroh

Mary Stroh

Patrick Sabo

Bill Stultz

Diana L. Mann

Lori Thompson &

Ben Downing

Brad & Loretia Ulery

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Katherine Connor

Lezlie Ward

Katherine Connor