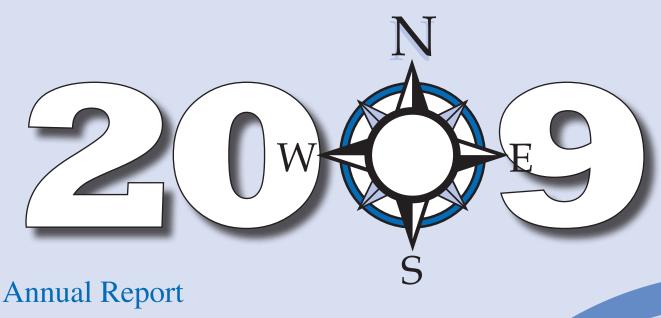
# **Community Foundation**

for Northeast Michigan





The Community Foundation for Northeast Michigan (CFNEM) was established in 1974. It serves the counties of Alcona, Alpena, Montmorency, and Presque Isle. In addition, in 1997 it established affiliate foundations to serve other counties in northeast Michigan that were not previously served by a community foundation: Straits Area Community Foundation (SACF) serves Cheboygan County; North Central Michigan Community Foundation (NCMCF) serves the counties of Crawford, Ogemaw, and Oscoda; and Iosco County Community Foundation (ICCF).

### **OUR MISSION**

The Mission of the Community
Foundation for Northeast Michigan is to
fulfill the charitable goals of our donors
and address the current and future
needs of our communities.

## **OUR VISION**

We build strong, vibrant and sustainable communities through the power of everyone's giving.

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### A MESSAGE FROM THE PRESIDENT

Thirty-five years ago, a small group of visionary citizens made a very smart decision that continues to benefit all of us today. Put into place was a structure that would ensure the community qualities we all value: good health, quality education, strong neighborhoods, cultural amenities, and a clean environment. We work to have these qualities here for us, for good, forever. Since 1974, the Community Foundation for Northeast Michigan (CFNEM) and its affiliates have distributed grants totaling more than \$24 million to support a wide array of programs, all of which have shared a single purpose: to improve the quality of life for the people of northeast Michigan.

Through the economic challenges we experienced in 2009, especially in northeast Michigan, we've all heard wishes for an improved economy, wishes for more employment and wishes for better economic conditions. However, as Eleanor Roosevelt said: "It takes as much energy to wish as it does to plan." So during 2009, the CFNEM Board came together and focused its energy to update its strategic plan. We wanted to ensure that CFNEM was following its original course, but was also aware of and ready to respond to the most current and critical issues facing our communities. The Board also made some changes to its investment portfolio to help stay on course even in tough economic times. Planning: not just for now, but for the future.

During our 2009 fiscal year we welcomed more than 400 first time donors. And the gifts CFNEM received for the year totaled nearly \$1.3 million, which, despite the troubled economic times, is an increase over last year. CFNEM also awarded grants of \$630,000 to organizations working to improve the quality of life in northeast Michigan.

It is our plan to invite everyone to experience the joy of sharing with their community. If you have thought about making a gift, now is the time. If you are among our generous donors who have given in the past, the grant recipients thank you. We look forward to even more generous support in the future.

Let us together turn our wishes into a plan. After all, as we say in our updated vision statement, "We build strong, vibrant and sustainable communities through the power of everyone's giving."

Georgene L. Hildebrand

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President

# 2009 BOARD OF TRUSTEES AND STAFF

### COMMUNITY FOUNDATION FOR NORTHEAST MICHIGAN BOARD OF TRUSTEES



Front row: Ashley Wilson (Youth Trustee Elect), Jennie Kerr, Nancy Coombs, Ann Burton and Sue Fitzpatrick. Middle Row: Ben Bolser, Tom Sobeck, Sue Keller, David Cook, Bill Speer and Larry Bruski. Back row: Esther Ableidinger, Steve Lappan, Bill Morford and Erik Nadolsky. Not Pictured: Marcia Aten, Chad Brandt (ICCF), Carolyn Brummund, Jerry Gosnell (NCMCF), Georgene Hildebrand, Jennifer Lee (SACF), Chuck Manning and Rob Morford (Youth Trustee)



### **STAFF**

Left to right:
DeeAnn Lounsbery, Fund and Account Manager
Christine Bruske-Hitch, Program Associate
Julie Wiesen, Program Director
Barbara Willyard, Executive Director

### 2009 AFFILIATE FOUNDATION BOARDS

# Iosco County Community Foundation

Chad Brandt - Chair
Jane Peters
Sue Alexander
Shelly Buresh
Patti Casey
Pauline Ferns
Stephanie Mallak Olson
Steven Smith (Youth Trustee)



# North Central Michigan Community Foundation

Jerry Gosnell – Chair
Jeanne Cardinal
Carolyn DiPonio
Hugo Burzlaff
Bob Carpenter
Rick Crisham
Michael Lange
Dave Marston
Joe Porter
Phil Shaw
Katelyn Blair (Youth Trustee)
Amber Swanson (Youth Trustee Elect)



# Straits Area Community Foundation

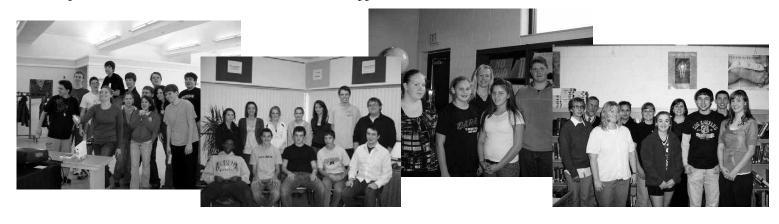
Katie Darrow – Chair Judy Bennett Ann Chastain Judy Churchill Joann Leal Jennifer Lee Joan Pepper Kathy Scoon Krista Siler Janet Weiss



## Northeast Michigan Youth Advisory Council (NEMYAC)

NEMYAC is a permanent committee of the Community Foundation for Northeast Michigan (CFNEM) and is comprised of approximately 60 students and seven adult advisors from the counties of Alcona, Alpena, Montmorency, and Presque Isle. Since April of 1993, YAC members have recommended over \$800,000 in grants for the four county service area. In the spring of 2010, the total number of grants submitted for review will reach 1,000. Thanks to a challenge grant from the W.K.Kellogg Foundation, CFNEM's YAC has over \$1 million permanently endowed in a youth field-of-interest fund. The fund provides nearly \$50,000 each year to be allocated for youth related programs and projects. After the students review grant applications and reach consensus about funding amounts, their recommendations are presented to the CFNEM Board of Trustees for final approval.





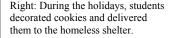
Above: YAC members from the counties of Alcona, Alpena, Montmorency, and Presque Isle meet three times each year to review grant applications.



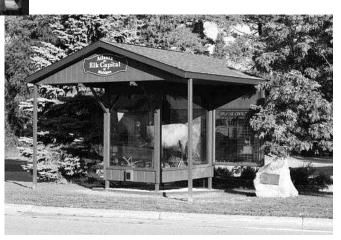
YAC advisors and students completed laps for the "Let's Get Moving Northern Michigan" project. Back L to R: Erin Fleming, Jim Gunderson, Michael Neumann, Scott Badgero, and Kim Wade. Front: Nicole DeFour, Natalie DeFour, and Amber Tyler.



new skills and adventures for area







Area youth often participate in community improvement project grants. Above left: The Mural of Hope in the outdoor garden area of the Alpena Cancer Center. Right: Renovation of the Atlanta Elk display, a focus of community pride in Montmorency County for many years.

## Affiliate YACs

CFNEM's affiliate Youth Advisory Councils (YAC) award grants each year to youth programs in their communities. Young people in Iosco County (ICCF), Crawford, Ogemaw and Oscoda Counties (NCMCF), and Cheboygan County and Mackinaw City (SACF) benefit from these grants. YAC members learn about the power of philanthropy, and it empowers them to make a real difference in their communities through grantmaking and service.

## Iosco County Community Foundation YAC



In 2009, the ICCF YAC awarded \$7,528 in grants to youth programs in Iosco County's communities.

Left: Four ICCF YAC members attended the 2009 Summer Youth Leadership Conference, hosted by the Council of Michigan Foundations (CMF).

ICCF YAC awarded a grant to St. Paul Lutheran Church to purchase book bags and school supplies for low-income students in Iosco County. The bags were distributed in time for the new

school year.

### 2009 YAC Grant



## North Central Michigan Community Foundation YAC

### **NCMCF YAC Grant**



Ogemaw County YAC awarded a grant to Grayling Cooperative Preschool, Inc. for equipment and supplies for music activities for students.

In addition to grantmaking, YAC members participate in community service activities like sending care packages to U.S. troops, helping with book drives, and taking part in Kids Against Hunger events.



NCMCF YACs learn about philanthropy through grantmaking and community service. Above, YACers practice reviewing grant applications during their 2009 annual orientation meeting in October.

## Straits Area Community Foundation YAC

### 2009 YAC Grant



2009 Straits Area YAC

During 2009, the Straits Area YAC (SAYAC) awarded \$4,077 in grants to youth programs in Cheboygan County and Mackinaw City.

RIGHT - SAYAC awarded a mini grant to Cheboygan Area Schools to purchase a Nintendo Wii and Wii Fit components to encourage activity and movement during breaks and recess.



## **FUNDS**

Anyone can establish a fund with the Community Foundation, but you don't need to establish a fund to make a contribution. Anyone can contribute to any of the following funds at any time, in any amount. The purpose of each fund varies with the charitable intent of the original donor, providing donors with a wide variety of philanthropic choices. To get more information about individual funds you can go to our website: www.cfnem.org. Fund names in color represent new funds established in 2008 and 2009.

### COMMUNITY FOUNDATION FOR NORTHEAST MICHIGAN (CFNEM) FUNDS

(Serving the counties of Alcona, Alpena, Montmorency and Presque Isle)

AGENCY FUNDS - The following funds have been established with the Community Foundation by nonprofit organizations to help in supporting their ongoing needs.

Alcona Conservation District Endowment Fund\* All Saints Catholic School Endowment Fund\*

Alpena Alzheimer's Association Fund

Alpena Area Recreation Commission Operating Fund\*

Alpena Civic Theatre Endowment Fund

Alpena County Library Fund

Alpena D.A.R.E. Endowment Fund\*

Stanley Beck Junior Achievement of Alpena Fund\*

Big Brothers/Big Sisters of Alpena Fund

Boys and Girls Club of Alpena Operating Fund

Curtis Township Library Endowment Fund\*

Faith and Hope Hospitality House Fund

First Congregational Church Parsonage Fund

**Grace Lutheran Church Endowment Fund\*** 

Hillman Community Education Endowment Fund\*

Hillman Community Education Foundation Non-endowed Fund

Henry and Peggy Hoffman Presque Isle District Library Fund

Henry and Peggy Hoffman Presque Isle Museum Fund

Huron Pines RC&D Council Endowment Fund\*

Michigan Karst Conservancy Fund\*

Robert Kennedy Alcona Elementary School Library Fund\*

MPAC Pledge and Operating Funds

**NEMROC Equipment and Facilities Fund\*** 

Northeast Michigan Community Mental Health Fund\*

Plaza Pool Endowment Fund\*

River Center Fund\*

SAFFE (Smoke Alarms for Fire Emergencies) Fund

Shelter, Inc. Endowment Fund\* Sunrise Mission Endowment Fund\*

Thunder Bay Arts Council, Inc. Fund\*

**Thunder Bay Community Complex Fund** Thunder Bay Community Health Services Fund

Thunder Bay Island Lighthouse and Cultural Resources Fund\*

Thunder Bay National Marine Sanctuary Fund\*

Thunder Bay Theatre Memorial and Legacy Fund

United Way of Northeast Michigan Fund

United Way of Northeast Michigan Endowment Fund\*

**DESIGNATED FUNDS** – The following funds were established by donors to support specific nonprofit organizations.

H. Bradford & Patricia S. Aarons Fund\*

Frank and Barb Agius Fund\*

Alcona Community Schools Endowment Fund\*

Alpena Community College Endowed Chair Fund\*

Alpena High School Band Boosters Endowment Fund\*

Alpena Public Schools Endowment Fund\*

Alpena Regional Medical Center Endowment Fund\*

Alpena Village Endowment Fund\*

Alpena Volunteer Center Romney Fund\*

Cliff Anscheutz Emanuel Lutheran Church Fund\*

Besser Foundation Admin. Endowment Fund for CFNEM\*

Besser Museum of Northeast Michigan Art Fund\*

Besser Museum of Northeast Michigan Endowment Fund\*

Boys and Girls Club Endowment Fund\* **Business and Industry Hospital Fund** 

Carlson Family Fund for the Benefit of the Huron Humane Society

Child and Family Services Prevention and Critical Needs Fund\*

Elk Country Animal Shelter Fund

First Congregational Church Capital Fund\*

John D. Fitzgerald, Jr. Memorial Fund\*

Friendship Room Fund\*

**Great Lakes Stewardship Initiative Endowment Fund\*** 

Great Lakes Stewardship Initiative Project Fund

**Headwaters Land Conservancy Fund\*** 

Hillman Community Christmas Dinner Fund\*

Homelessness Prevention Endowment Fund\*

**Hubbard Lake Community Building & Library Fund** 

**Huron Humane Society Endowment Fund\*** 

Avery O. Johnson Memorial Trust Fund for the Presque

Isle Library\*

Kiwanis Club of Alpena - Fletcher Fund\*

Dorothy Leitch Memorial Funds\*

Lewiston Area Historical Society Endowment Fund\*

Friends of Lewiston Library Fund\*

Eugene J. and Helen T. McLean Fund\*

Ann Skillman Moore & Russell Levering Moore Memorial Fund\*

Northeast Michigan Continuing Care Retirement Center Fund

Northern Lights Arena/MPAC Endowment Fund\*

Park Museum Fund\*

Presque Isle County Historical Museum Endowment Fund\*

School Success Fund

Special Olympics Fund for Athletic Training Fund\*

C. Fred and Olive Steele Memorial Fund I\*

C. Fred and Olive Steele Memorial Fund II\*

Arthur E. Sytek Park Fund\*

Thunder Bay Recreation Center Fund

Thunder Bay Trails Association Fund\*

**Tournament Tennis Courts Fund** 

Toys for Kids/Feed a Family Fund\*

Trinity Episcopal Church Fund\*

Westminster Presbyterian Church Fund\*

Yellow Ribbon Suicide Prevention Awareness of Alpena Fund\*

<sup>\*</sup>Indicates endowment funds that qualify for the Michigan Community Foundation Tax Credit.

## **FUNDS**

<u>DONOR ADVISED FUNDS</u> – The following Donor Advised Funds were established by donors wanting to recommend grants from the fund. These funds are a simple, flexible way for donors to organize their giving – and provide the advantage of working with our professional staff.

Alpena Exchange Club, Ma and Cap Wixon/Lancaster Fund\*

Alpena Lions Club Memorial Fund\*

Alpena Power Company Electrical Education Fund

Alpena Rotary Club Fund\*

Friends of Northeast Michigan Ecosystems Conservation Fund\*

Fund for Rogers City Arts and Education\*

K-2 Kids Fund\*

Macker Backers of Alpena Fund

Nethercut Fund\*

Tammy Pappas Education Fund\*

Park Community Recreational Complex Fund

Park Education Fund for Work Force Development

Park Schools Fund

Princeton Fund Pass-Through

Reitz Family Fund\*

Thunder Bay Jr. High School Student Loan Fund

Wayne Wire Cloth Products, Inc. Fund\*

## <u>FIELD OF INTEREST FUNDS</u> – The following funds were established by donors to support specific fields of interest.

Mr. and Mrs. O.B. Eustis Memorial Fund\*

**Huron Shores Health Fund\*** 

Kellogg Youth Fund\*

Ann M. Kuntz Fund\*

**Tobacco Settlement Partnership Fund\*** 

Women's Giving Circle Fund\*

<u>SCHOLARSHIP FUNDS</u> – The following funds were established by donors to support students in furthering their education.

Peter Aliferis Medical School Scholarship\*

Carl and Helen Basel MSU Scholarship Fund\*

Big A Scholarship Fund\*

Carsey-Ackerman Scholarship Fund\*

Jesse Besser Scholarship Fund\*

Michael S. Crick Scholarship Fund\*

Wesley Davis Family Scholarship Fund\*

William and Lillian Davis Scholarship Fund

William C. and Ida A. Farrow Music Scholarship Fund\*

First Federal of Northern Michigan Scholarship Fund\*

MSU William O. Gilliland Memorial Scholarship Fund\*

Philip J. Glennie Scholarship Fund\*

Grace Lutheran Church Scholarship Fund\*

Bill and Joyce Green Scholarship Fund\*

Hall Presque Isle County / ARMC Medical Scholarship Fund\*

Leland Harris/Gilbert Truax Engineering Education Fund\*

Jule and Thelma Hartwick Fund\*

Eleanor L. and John R. Heilman Nursing Education Fund\*

InsuranCenter Corporation of Alpena Scholarship Fund\*

Interlochen Alumni Scholarship Fund\*

Isadore and Gertrude Isackson Scholarship Fund\*

Frederick T. and Betty D. Johnston Scholarship Fund

Howard G. and Harriett R. Kelm Fund\*

Ida Knaebe Scholarship Fund\*

Phil Kruttlin Scholarship Fund\*

Lapp-Garber Scholarship Fund\*

Lincoln Lions Memorial Scholarship Fund\*

MSU Alumni Scholarship Fund \*

Ralph C. Mills Memorial Scholarship Fund\*

Neva Nelson Scholarship Fund\*

Eugene Nemeth Scholarship Fund\*

Nethercut University of Michigan Fund\*

Evelyn Oles Nursing Scholarship Fund\*

Lola M. Penney Memorial Nursing Scholarship Fund\*

Dee Brown Perry Scholarship Fund\*

Joseph P. Pinson Fund\*

Tom Rayha Memorial Scholarship Fund

Jamie Richardson Art Scholarship Memorial Fund\*

Richmond and Bingham Memorial Scholarship Fund\*

Alvin B. Somers Scholarship Fund\*

Wiesen Family Scholarship Fund\*

Edward & Eulalia Woloszyk Memorial Scholarship Fund\*

<u>UNRESTRICTED FUNDS</u> – The following funds were established by donors who wanted to give back to meet the ever-changing needs of their community.

Alcona County General Endowment Fund\*

Community Endowment Fund\*

Genite Family Fund\*

Chuck and Kathy Ingle Fund\*

Lappan Family Fund\*

**Montmorency County General Endowment Fund\*** 

Neva Nelson Memorial Fund\*

Panel Processing Endowment Fund\*

Presque Isle County General Endowment Fund\*

Stevens Fund\*

Mr. and Mrs. Walter G. Weinkauf, Sr. Endowment Fund\*

Wilson Family Fund\*

<u>DEFERRED INCOME FUNDS</u> – These funds were established through trusts created by donors to support them during their lifetime and to support CFNEM after their death.

The Granum Family Funds I - VIII The Ossineke Funds I and II

<sup>\*</sup>Indicates endowment funds that qualify for the Michigan Community Foundation Tax Credit.

# FUNDS OUR AFFILIATE FUNDS

### NORTH CENTRAL MICHIGAN COMMUNITY FOUNDATION (NCMCF) FUNDS

(Serving the counties of Crawford, Ogemaw & Oscoda)

### **AGENCY FUNDS**

**Crawford County Historical Museum Fund\*** 

District Health Department #2 Fund\*

Rifle River Watershed Restoration Committee Endowment Fund\*

River House Fund\*

West Branch Regional Medical Center Endowment Fund\*

#### **DESIGNATED FUNDS**

Citizens Bank CCEDP Match Fund\*

Crawford County Economic Development Partnership Fund\*

Esther & F.A. Diebold Memorial Endowment Fund for West

Branch Girls Scouts\*
Diane Gates Memorial Fund\*

Mabel Hager Memorial Fund\*

JL Howard Fund\*

Lake Margrethe Foundation Fund\*

Oscoda County Library Fund\*

St. Joseph School Endowment Fund\*

Steiner Museum Fund\*

Ward C. Taylor Endowment Fund\*

### **DONOR ADVISED FUNDS**

**Briney Ethical Fund\*** 

Cedars For the Au Sable River Program Fund

**Grayling Rotary Club General Fund\*** 

**Grayling Youth Booster Club Fund\*** 

Bob and Nancy Griffin Donor Advised Fund\*

**Mason Tract Cedars Fund** 

Monnie Orr Memorial Fund\*

Upper Au Sable River Preservation Association Fund

Wellspring Fund\*

#### FIELD OF INTEREST FUNDS

Crawford County Kellogg Youth Fund\*

Crawford County Lakes and Rivers Fund\*

Crawford County Recreation Fund\*

**Crawford Tobacco Settlement Endowment Fund\*** 

Ogemaw County Kellogg Youth Fund\*

Ogemaw Tobacco Settlement Endowment Fund\*

Oscoda County Kellogg Youth Fund\*

Oscoda County Tobacco Settlement Fund\*

#### **SCHOLARSHIP FUNDS**

Drs. Chris & Mary Chrysler West Branch Family Dentistry Fund\*

Crawford/Au Sable School District Scholarship Fund\*

### **ESP Scholarship Funds:**

**ESP Scholarship Fund\*** 

ESP Jerry Bunch Memorial Scholarship Fund\*

ESP Maxine Calvin Memorial Scholarship Fund\*

ESP Mike Gillette Law Enforcement Scholarship Fund\*

ESP Griffin Beverage Scholarship Fund\*

ESP Phillip John Manina Scholarship Fund

ESP Irene McMinn Scholarship Fund\*

ESP Ogemaw Heights Student Activities Scholarship Fund\*

ESP Richard Pauley Memorial Scholarship Fund\*

ESP Richard Riling Memorial Scholarship Fund\*

ESP Rose City Medical Careers Scholarship Fund\*

ESP Bernice Ruh Scholarship Fund\*

**ESP Edwin Shiel Memorial Fund\*** 

ESP Arthur E. Short Memorial Scholarship Fund\*

ESP Steuernol and McLaren Funeral Home Scholarship Fund\*

ESP Chester Surline Scholarship Fund\*

ESP VFW Scholarship Fund\*

ESP Daniel Wilber Memorial Scholarship Fund\*

ESP John Wilcox Memorial Scholarship Fund\*

Grayling Kiwanis Club General Fund\*

Reynold A. Gogarn Memorial Scholarship Fund\*

Kirtland Community College Educational Fund\*

Sheryl Krantz Memorial Scholarship Fund\*

Dawson Oaks Memorial Scholarship Fund\*

Optimist Club of West Branch Education Fund\*

Oscoda County College Fund\*

Irene E. Peterson Scholarship Fund\*

Rose City Lioness/Lions Club Scholarship Fund\*

St. Mary Church / Our Lady of the Woods Scholarship Fund\*

Dick & Doris Smith Memorial Scholarship Fund\*

Sharon Sutton Memorial Scholarship Fund\*

John "Jack" G. Thompson Scholarship Fund\*

West Branch Business and Professional Women's Association

Scholarship\*

West Branch High School Alumni Scholarship Fund\*

West Branch Kiwanis Club Education Fund\*

Whaley Steel Scholarship Fund\*

#### **UNRESTRICTED FUNDS**

Crawford County Community Endowment\*
Ogemaw County Community Endowment\*
Oscoda County Community Endowment\*

<sup>\*</sup>Indicates endowment funds that qualify for the Michigan Community Foundation Tax Credit.

## **FUNDS**

### STRAITS AREA COMMUNITY FOUNDATION (SACF) FUNDS

(Serving Mackinaw City and Cheboygan County)

#### **AGENCY FUNDS**

Cheboygan Area Public Library Fund Cheboygan Senior Center Endowment Fund\* Mackinaw Area Historical Society Fund\* St. Helena Lighthouse Endowment Fund\*

#### **DESIGNATED FUNDS**

Bois Blanc Island General Fund\*
Bois Blanc Island Operating Fund
Community Memorial Hospital Fund\*
Friends of West Mullett Lake Fund\*
Friends of Inland Lakes Schools\*

Icebreaker Mackinaw Maritime Museum Endowment Fund\*

Mackinaw Area Public Library Fund\*
Mackinaw Youth Hockey Fund\*
Music in Mackinaw Endowment Fund\*
St. Anthony's Church Endowment Fund\*
Straits Area Administrative Endowment Fund\*

### **DONOR ADVISED FUNDS**

Cheboygan Area Arts Council Fund\*
Cheboygan Area Chamber of Commerce Education Fund\*
Pepper Family Fund
Shepler Tourism Fund\*
Scheerens Family Fund

#### FIELD OF INTEREST FUNDS

Straits Area Tobacco Endowment Fund\* Straits Area Youth Fund\*

### **SCHOLARSHIP FUNDS**

Audie's Open Scholarship Fund\*
Cheboygan High School Scholarship Fund\*
Cheboygan Rotary Club Scholarship Fund\*
Great Lakes Captains Association Scholarship Fund\*
Douglas Jackson Memorial Scholarship Fund\*
Kiwanis of Cheboygan Scholarship Fund\*
Mackinaw City High School Scholarship Fund\*
Mackinaw City Women's Club Fund\*

Mackinaw High School Alumni New Career Scholarship Fund\*

Mackinaw Memorial Parade Scholarship Fund\* Mattson and Sons Scholarship Fund\* Charles and Ruth Norton Scholarship Fund\*

Doris Reeves Scholarship Fund\* Alberta Schappacher Scholarship Fund\*

Wolverine Education Association Scholarship Fund\*

#### **UNRESTRICTED FUNDS**

Straits Area Community Needs Endowment Fund\*

### **IOSCO COUNTY COMMUNITY FOUNDATION (ICCF) FUNDS**

(Serving all of Iosco County)

### **AGENCY FUNDS**

Au Sable Valley Community Mental Health Fund\* Iosco County Humane Society Fund\* St. Joseph Health System Endowment Fund\*

### **DESIGNATED FUNDS**

Mary Jane Chevis Endowment Fund\*

Churchill Tawas FISH, Inc. Memorial Fund\*

Jerry and Marge Cotter Fund\* Friends of East Tawas Library Fund

Reynold Mick Tawas Community Auditorium Fund St. Joseph Education Foundation Endowment Fund\*

Sheppard Fund\*

Van Etten Lake Endowment Fund\*

### **DONOR ADVISED FUNDS**

Thomas & Nancy Huck Charitable Gift Fund\* Tawas Kiwanis Foundation Fund\*

### FIELD OF INTEREST FUNDS

Iosco County Arts and Humanities Fund\*
Iosco County Health Care Fund\*
Iosco County Kellogg Youth Fund\*
Iosco County Lakes and Rivers Fund\*
Iosco County Recreation Fund\*

ICCF Tobacco Settlement Endowment Fund\*

### **SCHOLARSHIP FUNDS**

Carl and Christine Huebner Scholarship Fund\* George E. and Dorothy M. Green Scholarship Fund\* Hale Education Fund\*

Nancy Moran Scholarship Fund for Holy Family School\*

Marie Samuelson Scholarship Fund\*

Tawas Area Education Foundation (TAEF) Funds TAEF Harris Barkman Scholarship Fund\* TAEF Joseph Barkman Scholarship Fund\*

**TAEF Coyle Fund\*** 

TAEF Duane N. Sanders Memorial Scholarship Fund\*

TAEF General Fund\* TAEF Restricted Fund\*

Michael Wentworth Scholarship Fund\*

Elmer and Eliza Werth Fund\*

#### **UNRESTRICTED FUNDS**

William and Marcia Hopcroft Memorial Fund\* Iosco County Community Needs Fund\*

### **DEFERRED INCOME FUNDS**

**Huebner Charitable Gift Annuity Fund** 

<sup>\*</sup>Indicates endowment funds that qualify for the Michigan Community Foundation Tax Credit.



### COMMUNITY FOUNDATION FOR NORTHEAST MICHIGAN

In 2009, the Community Foundation for Northeast Michigan (CFNEM) and its affiliates awarded grants totaling \$630,464. CFNEM grants are awarded primarily for the benefit of residents in Alcona, Alpena, Montmorency and Presque Isle Counties, Michigan. We hope you will enjoy reading the following list of grants, while considering how the Community Foundation can help you fulfill your own philanthropic goals.

Alcona Community School\$5,845	Alpena Public Schools\$8,985
Biodiesel Production = Maple Syrup Production	What's Wrong with our Rivers?
Baseball Dugout Extension and Scoreboard	TBJHS/AHS Ski and Snowboard Club
Helping Meet Special Education Needs	AHS/Cross Country Ski Club
Book for the elementary school library	Senior Lock-in and After Prom Party
Work for Dirt	School events
Football Equipment First Aid Kits	Yellow Ribbon Suicide Prevention Campaign
	Long Rapids School Projector AHS KAPUT
New Books for the Media Center	
After School Woodworking Program	Electric Education Grants
Instrumental Music Library	TBJH Peers United in Friendship
Improving the High School Softball Fields	Improvements to the AHS Auditorium
Alcona County Baby Pantry\$2,075	Alpena Regional Medical Center \$2,278
Warm Babies and Toddlers for Alcona County	General Expenses
Alcona County Commission on Aging\$2,000	Alpena Project Connect 11/6/08
Kitchen Equipment	Free Women's Breast and Cervical
Alcona County Dept of Human Services\$500	Cancer Screening
Family Resource Center	Alpena Tennis Association\$5,000
Alcona County Library\$1,000	2008-09 Ready, Set, Serve! Sponsorship
Plug into CDs	Alpena Village\$1,544
Alcona Township Fire Department\$1,500	Fundraising expenses
Volunteer Dive Team	AMA Educational Service District \$700
All Saints Catholic School\$2,899	Friends of Sprinkler Lake/Fall Family Festival
General Expenses	American Red Cross of Northern
Alpena Area Speed Skating\$200	Lower Michigan \$1,500
Skates & Registration	Comfort Kits for Children
Alpena Boosters Club\$1,500	Health and Safety Instructor Training
Wings Over Alpena 2010	Atlanta Bible Church\$500
Alpena Community College\$26,900	Helping Hand Utility Assistance
Scholarships	Atlanta Community Schools\$890
Alpena CC Volunteer Center\$6,734	Reading is Fundamental Program
General Expenses	Atlanta Science Camp
Alpena CC Foundation\$2,500	Beaver Lake Community Church\$1,800
2008/2009 Teaching Chair Award	Mega Sports Camp
Alpena County\$4,746	Besser Museum for NE Michigan \$9,372
Plaza Pool/Ready, Set, Swim	Good Today/Great Tomorrow Campaign
Alpena County Library\$948	General Expenses
General Expenses	"What is the Fate of our Universe" program
Visions of the Universe	Boy Scout Troop 93\$300
Alpena Figure Skating Club\$3,500	Camping Equipment
1st Year Skaters Program	Boys and Girls Club of Alpena\$5,567
Alpena Hockey Association\$7,325	Passport to Manhood Program
Assistance for registration fees	General Expenses
1st Year Skaters Program	SMART Moves Program
Alpena Lions Club\$2,000	Briley Township \$1,750
Scholarships	Atlanta Elk Display Renovation Project

Brush Creek Grist Mill\$4,500	Great Lakes Clean Water Organization \$3,000
General Expenses	Yellow Jug Old Drug
Video History Project	Great Lakes Lighthouse Festival, Inc\$811
Calvary Episcopal Church\$177	Great Lakes Lighthouse Festival
Hillman Community Christmas Dinner	Habitat for Humanity-Montmorency \$1,000
Calvin College\$5,700	Well System for 2009 Build
Scholarships	Harrisville United Methodist Church \$500
Case Township\$3,800	Freezer Purchase
Computer Printer	Hillman Area Senior Citizens, Inc \$2,000
Turn Out Gear for Firefighters	Water Heater
Computer Equipment for Fire Department	Hillman Community Ed. Foundation \$7,029
Catholic Human Services, Inc\$500	St. John's Lutheran Children's Center grant
Alpena County Juvenile Delinquency	General Expenses
and Life Skills Program	Hillman Community Schools
Central Michigan University\$17,300	Hillman Community Schools\$4,492
Scholarships	Upgrade Yearbook Hardware/Software
City of Alpena - River Center Committee \$5,867	Portable Document Projector
"The Reel Fun" ice fishing tournament	L.C.D. Projector
City of Rogers City \$5,250	Broadcasting Program
Business Oriented Success Strategies	Hillman Free Methodist Church\$300
for Youth BO\$\$Y	Youth Rescue Program
Police Department Equipment	Hillman Township\$2,000
Curtis Township Library\$500	Tiger Paw Park Activities
Summer Programs	Hospice of Michigan\$1,145
Delta College\$6,100	To help Volunteer Services Programs
Scholarships	Huron Humane Society\$759
DePaul University\$500	General Expenses
Scholarships	Safety Around Animals Project
Depression & Bipolar Support Alliance\$500	Huron Pines RC&D Area Council\$8,200
Color Printer	Pine River-Van Etten Lake Watershed
District Health Dept. #4\$500	Summary
The Caring Place/Wii Game and Accessories	General Expenses
East Grand Lake Fire Department\$2,500	2009 O.B. Eustis Environmental Awards
Heart Start Equipment	Interlochen Academy for the Arts \$1,000
Eastern Michigan University\$4,000	Scholarships
Scholarships	Jets Football\$90
Elk Country Animal Shelter\$600	Football & cheerleading uniforms
Fetching for a Fence	Junior Achievement of NE Michigan \$425
Faith and Hope Hospitality House\$17,160	Banks in Action program
·	• •
General Expenses, lodging & land survey	Kalamazoo College\$500
Faith Outreach, Inc. \$350	Scholarships
Office Fax/Copier	Kirtland Community College\$5,200
Ferris State University\$4,000	Scholarships
Scholarships	Lake Superior State University\$1,400
First Congregational Church\$10,354	Scholarships
General Expenses	Long Lake Improvement Association\$500
Food Bank of Eastern Michigan\$2,700	2009 Walleye Stocking Project
Emergency Food Outreach	Lutheran Homes of MI Corporate\$300
Friends of Hoeft State Park\$3,300	The Pines Senior Complex of Alpena
Phase I: Playground Revitalization Project	Madonna University \$4,000
G.E.A.R. (Get Excited And Rally)\$3,000	Scholarships
Alpena Disc Golf Course	Make-A-Wish Foundation\$700
1031 Pro Skateboard Team Demo	Wish Granting
Grand Valley State University\$4,500	Michigan Karst Conservancy\$528
Scholarship	General Expenses

Michigan State University \$12,500	Posen Consolidated Schools\$5,029
Scholarships	Elementary School Core Reading Textbooks
Michigan Technological University\$6,200	Presque Isle Panthers Softball Equipment
Scholarships 0.564	Yearbook/Journalism equipment
Montmorency County\$561	Teaching History with "ELMO"
Wireless Duress Alarm & Staff	Fitness Room Upgrade
Messaging System	Traverse Climbing Wall
MPAC (Multi Purpose Arena Coalition) \$95,696	Presque Isle Conservation District\$1,200
General Expenses	Computer Equipment
Zamboni Payment for 2009	Presque Isle County Historical Museum\$15,000
First year skating program	Storage Units
Summer learn to skate program	General Expenses
MSU Extension -Montmorency County \$1,000	Summer projects
Community Wide Pinewood Derby	Presque Isle Township\$1,500
MSU Extension-Alcona County\$2,350	Lighthouse Park Playground
4-H Detroit Daytrip	Rogers City Chamber of Commerce \$1,500
Leadership Alcona - 2009	Friday Night Summer Concert Series
Master Gardener Resource Books	Rogers City Community Theatre Inc \$1,000
Mikado Community Kid's Garden	General Expenses
PA System	Rogers City Fire Department\$3,000
Music With A Message for Kids, Inc\$2,240	Pagers
Northeast Michigan Music Tour	Rogers City Hurons Athletic
NE Mich. Coalition for the Prevention	Boosters Association \$1,000
of Homelessness & Hunger\$3,131	LED Marquee Digital Sign
Project Connect expenses	Rogers City Public Schools\$204
General Expenses	Annual Award Plagues
Northeast Michigan Affordable Housing \$1,500	Rotary Club of Alpena\$5,000
Furniture/Equipment and Inspection Software	Rotary Mill Island Expenses
NE Michigan Center for Fine Arts, Inc	SAFFE Group\$1,415
Summer Arts Workshop Program	Smoke alarms for the public
Young Artists Exhibit	Saginaw Valley State University\$1,300
NE Michigan Community Partnership\$600	Scholarships
Power of Parenting Event	Salvation Army \$3,569
NEMCSA	General Expenses
School Success Programs	Call Us For Help
Northern Lights Arena\$75	Shelter, Inc\$1,403
	General Expenses
Skating registration fees	1
Northern Michigan University\$6,200	St. Bernard Church \$25
Scholarships Northwestern Mishiaga Callege	Youth Sleep-out donation
Northwestern Michigan College\$500	St. Ignatius Catholic Church\$446
Scholarships	General Expenses
Oakland University\$400	St. Ignatius School\$4,425
Scholarships	Computer Lab
Onaway Area Schools\$2,300	St. John Lutheran Church \$100
Summer School Program-Before and After School	Women's Wellness Workshop
Onaway Area Horse Club Building Upgrades	St. Matthew Lutheran Church\$500
Ossineke United Methodist Church\$497	"Save A Life" Project
Backpacking Adventure 2009 for Boy Scouts	St. Paul Lutheran Church\$144
Park Family Foundation \$76,799	Project Connect Iosco County
Fitness Equipment	Sunrise Mission, Inc\$2,828
Thunder Bay Community Complex expenses	Sunrise Mission Parenting Classes
TB Rec Center volleyball courts	Youth Sleep-out donation
Tennis court fire alarms	

Thunder Bay National Marine Sanctuary \$1,300
Life of the Lakes: Sailing Through History
Great Lakes Regional MATE ROV
Building Competition
Thunder Bay Soccer Association\$575
Registration fee assistance
Thunder Bay Theatre\$100
Theatre for Kids / with Kids
Township of Alpena\$48
General Expenses
Trinity Episcopal Church\$700
General Expenses

United Way of Northeast Michigan \$4,835
Computer/Software Purchase
Project Connect
New Campaign Software
General Expenses
University of Michigan\$28,975
Scholarships
Western Michigan University \$500
Scholarships
Wild Kitten Tumbling, Inc \$2,010
Tumbling equipment
Registration fee assistance
Word of Life Baptist Church\$150
Teen MOPS (Mothers of Preschoolers)



### NORTH CENTRAL MICHIGAN COMMUNITY FOUNDATION GRANTS

NCMCF serves the counties of Crawford, Ogemaw and Oscoda. Its assets, as of September 30, 2009, were \$2,015,836. During its 2009 fiscal year NCMCF received \$70,771 in gifts and paid out \$92,211 in grants.

Alma College\$850	Headwaters Land Conservancy\$900
Scholarships	Volunteer Monitoring Certification Program
Animal Shelter of Crawford County\$1,000	His Love Family Resources\$500
Please Stop Littering Fund	F.Y.I. (For Youth Integrity)
Baker College - Owosso\$500	Hospice of Helping Hands\$1,000
Scholarships	Camp Warm Hearts 2010
Big Brothers Big Sisters of Otsego County \$750	Huron Pines RC&D Area Council\$3,000
Bigs-in-Schools	Conservation First Responder Program
Central Michigan University\$1,900	Environmental Projects
Scholarships	General Expenses
City of Rose City\$3,382	Kirtland Community College\$3,505
Rose City Riverwalk Playground	Scholarships
Crawford Au Sable School District\$200	Kirtland Youth Theatre 2008-09 Season
General Expenses	Lake Margrethe Foundation\$8,364
Crawford County Devereaux Library\$100	Weed treatment for Lake Margrethe
Every Child Ready to Read @ Your Library	Lake Superior State University\$700
Crawford County Family Court\$500	Scholarships
J.U.S.T.I.C.E. Program	Marquette University\$500
Delta College\$700	Scholarships
Scholarships	Medford Area Senior High School\$100
Emma Lowery Congregational Church\$597	Briney Ethical Fund-Essay Contest
Emma Lowery Food Pantry	Michigan State University \$1,900
Falcon Site Development\$1,700	Scholarships
Ogemaw Heights High School Soccer Fields	Mio Au Sable Schools\$400
Friends of the Oscoda County Library\$135	Calculator Initiative
Friends of Literacy in Oscoda County program	Mio Cooperative Nursery, Inc\$1,000
Grand Rapids Community College\$750	New Playground Equipment
Scholarships	Mio United Methodist Church\$1,200
Grayling Co-Operative Preschool\$469	New tables for fellowship hall
Preschool Learning Equipment and Activities	National American Red Cross\$1,600
Grayling High School\$100	Comfort Kits for Children Victim to Disasters
Briney Ethical Fund-Essay Contest	Babysitter Training
Grayling Promotional Association\$829	Northern Michigan University \$1,000
Au Sable Valley Recreation Expo	Scholarships

Ogemaw County Humane Society\$1,000 Animal Shelter Start Up	University of Michigan\$500 Scholarships
Ogemaw Heights High School\$250	Upper AuSable River Property
Dealing with Dyslexia presentation	Owners Assoc\$10,402
Oscoda County Library\$500	General Expenses
Outdoor park bench	River patrol services
Peter Pan Cooperative Pre-School Center \$1,500	Materials for river erosion protection
Playground Renovation	West Branch - Rose City Schools\$3,632
Reynold Gogarn Scholarship Committee \$24,000	Ogemaw Heights Freshmen Girls Softball
Scholarships	OHHS Robotics Team
River House, Inc\$200	Drama Project
Training and Education Equipment and DVDs	West Branch Crisis Pregnancy Center \$500
Saginaw Valley State University\$1,650	Earn While You Learn
Scholarships	Western Michigan University\$500
Sienna Heights University\$500	Scholarships
Scholarships	Winebrenner Theological Seminary\$100
Together We Can Food Pantry\$1,000	Briney Ethical Fund-Essay Contest
Helping Those in Need of Food	



### STRAITS AREA COMMUNITY FOUNDATION GRANTS

SACF serves Cheboygan County and Mackinaw City. Its assets, as of September 30, 2009, were \$993,534. During its 2009 fiscal year SACF received \$79,273 in gifts and paid out \$33,418 in grants.

American Red Cross of Northern Lower Michigan\$396	Inland Lakes Schools\$252 National Scholastic Press Assoc. Fall Conference
Smoke Detector Distribution and Battery Replacement	Kiwanis Club of Cheboygan \$600 Scholarships
Bishop Baraga School\$300 Battle of the Books	Lawrence Technological University \$350 Scholarships
Bois Blanc Island Parks & Rec. Committee \$2,500 Mary's Lake Dock project	Mackinaw Area Historical Society \$852 Booklet Diary of Mary Anderson
Bois Blanc Island Community Foundation \$6,118 General and fundraising expenses	Mackinaw City Chamber of Commerce \$2,300 Summer Music in Mackinaw
Cheboygan Area Arts Council, Inc\$1,000 Fine Arts Scholarships	Mackinaw City Schools
Cheboygan Area Schools\$150	Project Close Up
Healthy and Active Indoor Recess  Cheboygan Compassionate Ministries\$1,200	Michigan Technological University\$750 Scholarships
Back to School Giveaway Event  Community Memorial Hospital\$3,603	North Central Michigan College \$200 Scholarships
General Expenses Ferris State University\$350	Saginaw Valley State University \$1,400 Scholarships
Scholarships Friends of Inland Lakes Schools	Wolverine Community Library \$200 After School Tutoring/Mentoring Program
General and fundraising expenses	Wolverine Community Schools\$450
Grand Valley State University\$500 Scholarships	Wolverine Varsity Baseball Equipment Spanish-English Dictionary Purchase



### **IOSCO COUNTY COMMUNITY FOUNDATION GRANTS**

ICCF serves all of Iosco County. Its assets, as of September 30, 2009, were \$2,662,773. During its 2009 fiscal year ICCF received \$825,645 in gifts and paid out \$54,163 in grants.

Adrian College\$2,000	Lake Louise United Methodist Camp\$438
Scholarships Alabatan Tayunakin	Summer Camp
Alabaster Township\$1,000 Signage for Native Plants on Alabaster Bike Path	Lake Superior State University\$333 Scholarships
Alma College\$1,333	Marquette University\$1,000
Scholarships	Scholarships
Au Sable-Oscoda Historical Society\$1,000	Michigan State University\$1,000
J.D. Hawks Historical Photo Album	Scholarships
Restoration Project	National American Red Cross\$1,000
,	National CPR/AED Awareness Week
Central Michigan University\$3,513	·
Scholarships  Delta College\$1,000	Oakland University\$1,000
_	Scholarships
Scholarships	Ohio State University \$1,000
Ferris State University\$1,000	Scholarships
Scholarships	Oscoda Area First Responders
FISH Inc. Oscoda\$1,000	First Responder Equipment
Christmas Gift House	Special Olympics Michigan, Area 31\$1,000
Good News Ministries Lutheran Church\$500	2009 Bowling program
Senior Boxes	St. Joseph Health Care System\$1,090
Family Fun Day	Sexual Assault Nurse Examiner Program (S.A.N.E.)
Grand Valley State University\$1,666	Operation Backpack
Scholarships	St. Paul Lutheran Church\$750
Hale Area Schools\$300	Project Outreach for Youth
Red Ribbon Week Activities	Saginaw Valley State University\$2,000
Holy Family School\$13,885	Scholarships
Tuition scholarships	Tawas Area Educational Foundation\$6,000
General Expenses	Mini-grant programs
Huron Hockey & Skating Association\$1,528	University of Michigan\$2,000
On Ice Track System Harness	Scholarships
Iosco-Arenac District Library\$794	Whittemore/Prescott Area Schools\$3,200
Wii Fun for Everyone	Student Mentor Program
Kalamazoo Valley Community College \$1,000	Public Safety Appreciation and Community
Scholarships	Involvement
Kirtland\$2,000	Western Michigan University\$333
Scholarships	Scholarships
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### **APPLYING FOR A GRANT**

The Community Foundation for Northeast Michigan welcomes grant applications from tax-exempt organizations recognized under Section 501(c)(3) of the Internal Revenue Code, and other qualified public entities (churches, schools, and governmental agencies). Grant applications are reviewed by program staff and evaluated by screening committees of the Community Foundation, who make recommendations to the Board of Trustees. The Board makes the final determination regarding all grants.

Grants are made in areas such as education, environment, health care, human services, humanities, and public benefit. Generally, grant awards are made only to eligible organizations that benefit the residents of northeast Michigan. Applicants can find grant and scholarship information, forms and deadlines on our website at <a href="https://www.cfnem.org">www.cfnem.org</a>, or by calling the Foundation's program staff at (989) 354-6881, or toll free at (877) 354-6881. To make it even easier, you can now fill out and submit grant or scholarship applications online.

The following individuals, families, companies and organizations contributed to the Community Foundation between January 1 and December 31, 2009. Gifts were gratefully received in the form of establishing a new fund or by adding to an existing fund. Every effort was made to ensure the list is complete and accurate; if your name is missing or inaccurate, however, please accept our apology and let us know so we may correct our records.

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THE LEGACY SOCIETY is an organization of friends and benefactors of the Community Foundation for Northeast Michigan and its affiliates who have made plans to leave a gift to the Foundation. Too often, such gifts go unrecognized because they come at the end of the donor's life. The Legacy Society provides a way to recognize and thank donors during their lifetimes.

To become a member of the Legacy Society, the only requirement is a statement of establishment or intent to leave a gift to the Community Foundation through a bequest, charitable trust, life insurance or other planned gift. Membership can be anonymous if desired. Members of the Legacy Society are special people who have provided for the future of northeast Michigan through the Community Foundation. The purpose of the Legacy Society is to commend and recognize these people for their foresight and interest in supporting their community.

There are many ways to include the Community Foundation in estate planning and thereby become a member of the Legacy Society. For more information, contact the Community Foundation office at (989) 354-6881, or toll free at (877) 354-6881.

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## **Audited Financial Statements**

### CONDENSED STATEMENT OF ASSETS

(October 1, 2008 to September 30, 2009)

	2009
ASSETS	
Current Assets	**=**
Cash and Cash Equivalents Pledges receivable – current	\$656,913 51,782
Allowance for uncollectible pledges – current	(7,495)
Amowance for unconcended picages current	(7,455)
Investments	18,907,427
Long-term Assets	
Long-term pledges receivable	83,503
Discount on long-term pledges receivable	(10,000)
Allowance for long-term uncollectible pledges	(6,650)
Property and Equipment, net of accumulated depreciation	14,145
TOTAL ASSETS	<u>\$19,689,625</u>
CONDENSED STATEMENT OF LIABILITIES AND NET ASSETS	
(October 1, 2008 to September 30, 2009)	
LIABILITIES	
Current Liabilities	
Accounts & Salaries Payable	\$1,603
Accrued Administrative Fee Payable	24,159
Grants Payable	218,371
Non-current Liabilities	
Grants Payable – long term portion	87,120
Funds Held for Agencies	1,818,979
Split Interest Agreements	1,023,798
TOTAL LIABILITIES	\$3,174,030
NET ASSETS	
Unrestricted	(331,641)
Temporarily Restricted	2,679,287
Permanently Restricted	14,167,949
TOTAL NET ASSETS	<u>\$16,515,595</u>
TOTAL LIABILITIES AND FUND EQUITY	<u>\$19,689,625</u>
CONDENSED STATEMENT OF REVENUE AND DISBURSEMENTS (October 1, 2008 to September 30, 2009)	
(October 1, 2008 to September 30, 2009) REVENUE	
Contributions	\$1,272,629
Grants for Administrative Expenses	39,673
Investment Return	64,915
Change in Value of Split Interest Agreements	(156,013)
TOTAL REVENUE	<u>\$1,221,204</u>
DISBURSEMENTS	
Grants and Direct Fund Expenses	630,464
Administrative Expenses	298,304
Trust Fees TOTAL DISPURSEMENTS	6,660
TOTAL DISBURSEMENTS	<u>\$935,428</u>

The Community Foundation for Northeast Michigan's most recent IRS Form 990 and annual audit, as well as all policies, are available to the public upon request. The Foundation's IRS Form 990 may also be accessed on the web at www.guidestar.org.

# Northeast Michigan Women's Giving Circle

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The Alpena News The First Ones

Gals Always Young Home Study Group League of Women Voters of Alpena County

Reflections Salon

Thursday Night Wine Ladies

### 2009 Memorial Gifts

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Professor Richard Lincoln

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Debra Post Helen Dietz Saddler Carol Stineman

### During the 2009 grant cycle, the WGC grant screening committee awarded \$1,000 in grants to the following nonprofit agencies:

- \$600 to Alpena Regional Medical Center toward Free Women's Breast and Cervical Cancer Screening Clinics.
- \$300 to United Way for the Alpena County Project Connect.
- \$100 to St. John Lutheran Church in Rogers City toward the Women's Wellness Workshop.

Following the Great Depression and World War II, the United States entered a golden age of business growth and personal prosperity. Despite the recent downturn in the economy, Americans have created, invested and multiplied unprecedented private wealth. Over the next 50 years, this capital—a conservative estimate of \$50 trillion—will change hands. Most will certainly go to heirs (and taxes), but a portion may be preserved as your legacy for the future of northeast Michigan.

Research has been done by the Rural Policy Research Institute (RUPRI) Center for Rural Entrepreneurship, and funded in part by the W. K. Kellogg Foundation, estimating the portion of wealth transfer likely to happen in our state and community. Retaining a slice of that wealth for philanthropy as it transfers generations is a historic opportunity for strengthening northeast Michigan. That's why the Community Foundation for Northeast Michigan and its affiliates are working to secure planned gifts and bequests for endowments that will ensure a stronger future for northeast Michigan, forever.

### Michigan Transfer of Wealth

Using conservative analysis, economists estimated in 2005 the net worth of Michigan residents to be \$848.35 billion (\$198,000 per household). While those figures may be somewhat reduced in 2010, over the next ten years, \$140.62 billion (\$34,000 per household) is expected to pass from one generation to the next. Over the next 50 years, \$972.24 billion (\$225,000 per household) of wealth is expected to transfer to heirs. And, if we don't take action, much of those assets in northeast Michigan will drain from our state.

### What you can do

No matter whether your estate is large or small, plan a portion of it to go back to your community. You can work with your professional advisor to work out the details or it can be as simple as a bequest in your will of a percentage of your assets to go to the Community Foundation to support your community. If we who live in northeast Michigan don't make plans to support it, who will?

If you would like more information about the Transfer of Wealth, contact our office.



**Northeast Michigan** 

For **good.** For **ever.**\*

111 Water St. - P.O. Box 495 Alpena, MI 49707-0495 tel: 989.354.6881

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