

# 2013 ANNUAL IMPACT REPORT

*Impacting the Community for 26 Years*



**WINONA  
COMMUNITY  
FOUNDATION**

*One vision. Many paths.*



*Inspired by the area's rich tradition of generosity, the Winona Community Foundation strengthens our community through philanthropy.*

## **VISION STATEMENT**

The Winona Community Foundation will foster a healthy, dynamic community where all people have the opportunity to enhance the quality of their lives and the lives of others.

## **MISSION STATEMENT**

The Winona Community Foundation improves the quality of life in the Winona area by:

- Educating the public about the practice of philanthropy and its benefits both to donors and to the community
- Connecting people with charitable intent and resources with organizations and causes that can advance the public good
- Gathering, preserving and stewarding philanthropic resources
- Collaborating with other charitable organizations
- Serving as a catalyst for selected community initiatives
- Making grants to projects and causes that address both the needs and the opportunities present in the community

# Vision & Mission

At its core, our community is philanthropic. When we see a problem, we join hands to fix it. Even when it's not solving a problem, but rather supporting an event, the arts, or the betterment of a program, our community is there contributing money, time and know-how.

I am privileged to witness this generosity first hand. The Winona Community Foundation not only assists with the distribution of grants from donor advised funds, we also work with managing the excellent work of funds like Goodfellows, the Bike Path Project, and many more. Reflecting on the variety of over 1,400 different donations that were facilitated by WCF, I am touched by the many notes from donors expressing why they wanted to participate.

Winona is fortunate to have one of only 13 independent community foundations in the State of Minnesota. Community foundations are philanthropic hubs supporting and connecting donors and nonprofits. They make it easy for generous people to create charitable funds, help manage the funds, and work with donors to support causes they care about.

Currently, WCF manages over 100 unique funds, and has had a very positive 2013, infusing over \$1.6 million back to the community and beyond. Our donors and fund advisors are simply inspiring. Like the Mighty Mississippi, their support gathers and gains momentum flowing out to benefit a great many people.

The Minnesota Council on Foundations has reported that in Minnesota alone more than \$47.9 billion will transfer from one generation to the next in the next 18 years. The Winona Community Foundation would be honored to act as your resource to carry out your philanthropic passions for the long or short term.

Jeni Arnold  
WCF President



## PAST BOARD MEMBERS

### **Mike Allen\***

Muriel Arnold  
Chris Arnold  
Bud Baechler  
Rita Banicki  
Mickey Barr  
Bob Bartz  
Mike Bernatz  
Jane Biesanz  
Ted Biesanz  
Richard Blahnik

### **Andy Blomsness\***

Steve Blue  
Sara Brandon  
Adolph Bremer  
Jan Brosnahan  
Dave Bue  
Tim Burchill

### **Sandra Burke\***

### **Judy Davis\***

Brother Louis DeThomasis  
Randy Domeyer  
Chuck Eddy  
Laura Eddy  
Sue Edel  
Karen Fawcett  
Father Tom Finucan  
Bill Flesch  
Fred Fletcher

### **Dan Florness\***

Jim Forsythe  
Bob Gilbertson  
Tom Graham

### **Joan Greshik\***

Gary Hayes  
Carol Heineman  
Donna Helble  
Dale Helmich

### **Andrea Herczeg\***

Margaret Johnson  
Jerry Kellum  
John Kennedy

### **Jennifer Knapp-Severson\***

Pauline Knight  
Mark Kristensen  
Darrell Krueger

### **Ann Lavine\***

Laurie Lucas  
Kevin Mahoney  
Gabe Manrique  
Leone Mauszycki  
Bill McNeil

### **Shelly Milek\***

### **Tedd Morgan\***

Floretta Murray  
Gerald Neal  
Rod Nelson  
Bud Nystrom  
Carol Orlowski  
Patti Peterson

### **Ryan Ping\***

Bob Quinlan  
Rodger Reitmaier  
Jack Richter  
Ralph Ruben  
Pat Rukavina  
Ken Seebold  
Donna Seitz  
Judy Shepard  
Tom Siewert  
Royal Thern  
Todd Thompson

### **Dan Trainor III\***

Rene Walz  
**Gary Watts\***  
Joyce Woodworth  
**Tom Wynn\***

## Dear Friends of the Winona Community Foundation,

I have had the privilege of serving on the board for 7 years, and the past two years as board chair. I will continue to serve as past chair on the executive committee which keeps me connected to an organization I believe is a great asset to our community. I leave the leadership of the Winona Community Foundation in a strong financial position with Judy Davis, and with continued support from the community we will be able to grow, allowing the foundation to continue its support of Winona.

As we reflect on this last year, and celebrate the new, I am filled with gratitude for the wonderful board members I have had the privilege to work with, 5 of whom are leaving this year (Andy Blomsness, Steve Blue, Dan Florness, Jennifer Knapp and Dan Trainor III). The board serves many organizations throughout the community and are talented and passionate people, contributing of their time and talents. We are grateful they have chosen the Winona Community Foundations as one of their passions.

The dedicated staff and board work hard to uphold the highest professional standards as they serve the foundation. This is measured by the Council on Foundations which qualified the Winona Community Foundation to proudly display their seal for exceeding the CF National Standards.

Together, with you, our donors and fund advisors, we will continue to follow our founders' vision that started in 1987 yet still listen to the new needs of the community. The goal of the Winona Community Foundation is to carry on with the vision of improving the quality of life in the community into perpetuity. Just as any building needs care, maintenance and attention to stay solid, the Foundation will remain vigilant to maintain a trusted source for people and organizations to invest their financial resources.

Sincerely,  
Sandra Burke

2013 Chairperson, WCF Board

# Financial Summary

## Statement of Financial Position as of December 31:

### ASSETS

	2013	2012
Cash and other current assets	15,870	1,870
Pledges receivable	53,632	357,502
Remainder trusts receivables	322,141	313,308
Investments	12,273,610	10,846,492
Other assets	16,890	18,444
<b>Total assets</b>	<b>\$12,682,143</b>	<b>\$11,537,616</b>

### LIABILITIES

Accounts payable and accrued liabilities	18,158	13,002
Grants Payable	-	2,153
<b>Total liabilities</b>	<b>\$18,158</b>	<b>\$15,155</b>

### NET ASSETS

General	876,996	713,968
Restricted or designated	11,786,989	10,808,493
<b>Total net assets</b>	<b>\$12,663,985</b>	<b>\$11,522,461</b>
<b>Total liabilities and net assets</b>	<b>\$12,682,143</b>	<b>\$11,537,616</b>

## Support, Revenue & Expenditures as of December 31:

### SUPPORT & REVENUE

Contributions	1,883,883	1,981,608
Investment earnings (losses)	1,356,268	887,844
Other revenue	241,879	194,266
<b>Total support and revenue</b>	<b>\$3,482,030</b>	<b>\$3,063,718</b>

### EXPENDITURES

Community General Fund grants	26,500	16,000
Advised grants	1,546,292	858,666
<b>Total grants</b>	<b>\$1,572,792</b>	<b>\$874,666</b>

Operations and investment expense	767,714	603,013
<b>Total expenditures</b>	<b>\$2,340,506</b>	<b>\$1,477,679</b>
<b>Excess of revenue (expenditures)</b>	<b>\$1,141,524</b>	<b>\$1,586,040</b>
<b>Net assets at beginning of year</b>	<b>\$11,522,461</b>	<b>\$9,936,421</b>
<b>Net assets at end of year</b>	<b>\$12,663,985</b>	<b>\$11,522,461</b>

\*The above limited financial information is audited.  
Complete audited financial statements are available at the Foundation office.

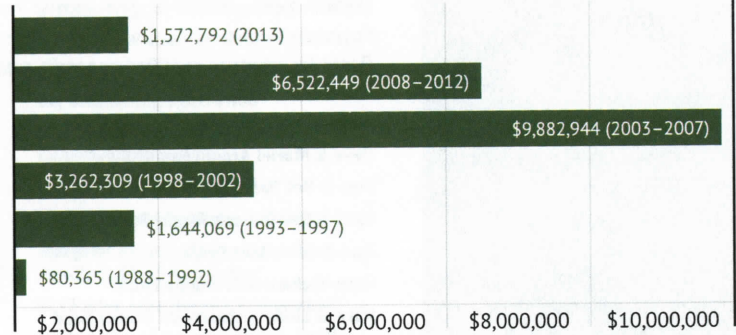


# Historic Impact & Growth Chart

## PUTTING IT ALL TOGETHER

Winona Community Foundation looks to the future, it works to manage overall assets wisely and professionally, while still maintaining sufficient resources to support a variety of community organizations. Working with the advisors, WCF maps out the future to ensure the growth of assets, as well as donor education about the value of using WCF as a vehicle for long-term community charitable goals.

## ADVISED GRANTS FROM 1988 - \$22,938,428



## NET ASSETS FROM 1987



## WAYS TO GIVE

We offer a variety of funds to meet the different charitable interests and needs of donors:

- Donor Advised Funds
- Field-of-Interest Funds
- Designated Funds
- Scholarship Funds
- Agency Funds
- Special Purpose Funds
- Winona Fund
- Community General Fund
- Community Granting Fund
- Founders Fund



*One vision. Many paths.*

# Foundation Funds

## DONOR ADVISED FUNDS

*Donors make charitable gifts into a named fund at the Winona Community Foundation. Over time, funding recommendations are made to the Foundation's Board for grants to qualified nonprofit organizations.*

### Anonymous (7) Funds

Dave & Muriel Arnold Family Fund

Jane & Bob Bartz Family Fund

Patti & Ted Biesanz Family Fund

Ann & Steve Blue Fund

Gerry Cichanowski Family Fund

Mike & Linda Cichanowski Family Fund

Dahl Automotive Fund

Judith & William Davis Fund

Mark Deter Memorial Fund

Chuck & Laura Eddy Family Fund

John & Susan Eddy Family Fund

Phillip Feiten Family Fund

Robert & Erika Gilbertson Fund

Harry Kline Memorial Fund

J. R. Watkins Naturals Fund

Pauline & Harland Knight Family Fund

Helen Leaf Haun Fund

Linda & Dale Kukowski Family Fund

### Langenau Legacy Fund

Leonard Lopez Memorial Fund

Leone J. & Thomas E. Mauszycki Family Fund

Joan & William McNeil Family Fund

Jeremy & Janel Miller Family Fund

Mr. Morris Extra Chance

Patricia & Jerry Papenfuss Family Fund

Arlene & J. C. Pfeiffer Fund

R.E.A.C.H Fund

Dan & Pat Rukavina Family Fund

Barb & Steve Slaggie Family Fund

Marie S. & Charles R. Smith Family Fund

Thern Fund

Trainor Family Fund

Shelley & Dan Trainor III Family Fund

Caer & John Vitek Family Fund

Pete & Joyce Woodworth Family Fund

Barbara & Tom Wynn Family Fund

## SCHOLARSHIP FUNDS

*These Funds are established to provide support to an individual student's education beyond high school. From medicine to golf, scholarship donors may select their Fund's focus, all while supporting a student's dream of a better future. Grants are awarded based on an established set of criteria evaluated by independent committees.*

Gomez Montessori Scholarship Fund

Bruce McNally Family Scholarship Fund

Morrie Miller Memorial Scholarship Fund

Rotary Ambassadorial Visitor Fund

Brianna Grace Vitek Scholarship Fund

## DESIGNATED FUNDS

*When making a donation to a designated Fund the donor advises the Foundation to pay available grant dollars to a specific named organization or project.*

Clara Barton Fund (Red Cross Winona County Chapter)

Friends & Deborah Miller Kanaber Library

Rotary International Fund

Winona Area Hospice Endowment Fund

Winona Area Track & Field Project

## SPECIAL PURPOSE FUNDS

*These Funds support a separate charitable organization that attaches itself to the Community Foundation and enjoys the favorable public charity status of the Foundation.*

Beyond Tough Guise Fund  
BK5K Youth Fund  
Bluff Country Studio Art Tour Fund  
Winona Coca-Cola Bike Path Fund \* -  
Community Fund  
Community Arts Center Fund  
Creating Ability Fund -  
Dive & Rescue Fund  
Early Childhood Initiative Fund  
Emergency Response Team Fund  
Frozen River Film Festival Fund  
Hiawatha Valley Marines Fund  
High Wagon Bridge Restoration Fund  
Homer Civic Association Fund  
Pete Kuklinski Jr. Golf Fund  
Landon We-Noh-Na Fountain Fund  
Masonic Temple Restoration Fund

Midwest Music Fest Fund  
Moline Historical Organ Fund  
Nordic Ski Club of Winona Fund  
PHL Save-A-Life Fund -  
Rotary Bike Path Fund -  
Rotary Service Fund -  
Rushes Wilderness Foundation Fund  
Steamboat Days of Winona Fund  
Winona Park Development Fund  
• Basketball -  
• Lake Bike Path \*  
• Levee Park \*  
• Tennis -  
Winona Sister Cities Fund  
Women of Purpose Fund -  
Winona World Fair Fund

## FIELD-OF-INTEREST FUNDS

*These Funds allow donors to target their gift to reflect a passion for a particular cause or area of interest. The Foundation makes grants from these Funds to support the most appropriate projects within that prescribed area of interest.*

Dental Care Access Fund  
Emergency Assistance Fund  
Flatlander Speed Society Fund

Goodfellows \*  
Marie's Book Fund  
Pfeiffer Land Fund

## AGENCY FUNDS

*These Funds enable other non-profit organizations to establish their own long-term fund at the Foundation. The Foundation handles the investment and management of the assets, distributing the earnings back to these agencies for their general purposes.*

Big Brother Big Sister Fund  
Bluffview Montessori Community General Fund  
Habitat for Humanity Fund  
Polish Cultural Institute & Museum Fund  
Margaret Simpson Home Fund dba Family & Children's Center  
St Charles Area Hospice Endowment  
United Way of Greater Winona Fund  
Winona Community Foundation  
• Jack & Sue Cornwell Memorial Fund  
• Founders Fund  
• Thomas H. Laken Admin Endowment Fund  
• Wilmer L. & Beverly A. Larson Fund  
Winona County Developmental Achievement Fund  
Winona Senior Friendship Center Fund  
Winona Volunteer Services Endowment Fund

\* denotes fund was opened in 2013  
^ denotes seed fund opened in 2013  
~ denotes fund was closed in 2013

The funds represented in this report reflect only those who have authorized the Foundation to publish the name of their fund and excludes the funds who have requested to remain anonymous

These funds may be endowed or pass-through.

- An ENDOWED FUND is one in which the principal is kept intact and only a certain amount of the earnings are available each year for granting purposes. Donors may require that the principal remain intact in perpetuity, for a defined period of time, or until sufficient assets have been accumulated to achieve a designated purpose.
- A PASS-THROUGH FUND is one in which the fund advisor may grant out of the principal

# 2013 Advised Grants

2013 Advised Grants Total  
**\$1,546,292**

The vast majority of funding made available through the Winona Community Foundation to local and other non-profits is initiated at the request of donors who have various funds with the Foundation.

28%.....	Civic
26%.....	Education
20%.....	Human Services
13%.....	Other
6%.....	Religious
4%.....	Arts
2%.....	Athletic
2%.....	Health



*One vision. Many paths.*



## ARTS

Friends of the Houston Nature Center	
Frozen River Film Festival	
Great River Shakespeare Festival	
Minnesota Beethoven Festival	
Minnesota Marine Art Museum	
Polish Cultural Institute of Winona	
Theatre du Mississippi	
Upper Mississippi Jazz Society	
Winona Brass Band	
Winona Dakota Unity Alliance	
Winona Oratorio Chorus	
<b>Arts Grants Total</b>	<b>\$59,500</b>

## ATHLETIC

Cornell University Foundation	
Goodview Sandlot Baseball Association	
Lewiston High School Activity Fund	
MN Youth Ski League	
Morrie Miller Athletic Foundation	
Nordic Ski Fund	
Pole Pilots Track Club Inc	
West Central Initiative	
Winona State Warrior Club	
Winona Y M C A	
Y M C A Camp Olson	
<b>Athletic Grants Total</b>	<b>\$35,475</b>

## CIVIC

Catholic Charities Diocese of Venice	
Center for Victims of Torture	

City of Winona - Bike Path Paving	
Freedom Honor Flight	
Goodview Activity Group	
Hiawatha Valley Marines	
HIMS of Winona	
Marco Eagle Sanctuary Foundation	
New Auburn Area Fire Department	
North Liberty Community Pantry	
Oxfam America	
Rotary International Service	
Serving our Neighbors Ministries	
UNICEF	
Wabasha County Historical Society	
Winona County Historical Society	
Y M C A Neenah Menasha	
<b>Civic Grants Total</b>	<b>\$432,750</b>

## EDUCATION

Bethel University Office of Development	
Bluffview Montessori School	
Caledonia Public Library	
Catholic Schools Foundation of Winona	
Child First	
Children's Museum of La Crosse Inc	
Cotter Schools	
De La Salle Blackfeet School	
Friends of Winona Public Library	
Highland Catholic School	
Hope Lutheran High School	
John XXIII Educational Center	
Junior Achievement - Upper Midwest	
Minnesota Private College Fund	

Minnesota State College - SE Tech Foundation  
 North Dakota State University  
 Pierce School Parent Teacher Organization  
 Ready Set School Winona County Inc  
 Ridgeway Community Association  
 Saint Mary's University of Minnesota  
 St. Paul Academy & Summit School  
 University of St. Thomas  
 Washington Kosklusko Elementary School  
 Winona Area Catholic Schools  
 Winona Area Catholic Schools Foundation  
 Winona Area Public Schools Foundation  
 Winona Senior High School  
 Winona State University  
 Winona State University Foundation  
 Yinghua Academy

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*Education Grants Total* *\$398,137*

## HEALTH

Alzheimer's Association Southern Minnesota  
 Alzheimer's Disease & Related Disorders  
 American Cancer Society  
 Asperger's Association of New England  
 Good Shepherd Foundation  
 Hiawatha Valley Mental Health Center  
 Mayo Foundation  
 Orlando Health Foundation  
 Saint Anne Foundation  
 Sauer Memorial Home  
 St. Anne Hospice  
 St. Charles Area Hospice  
 St. Jude Children's Research Hospital  
 Winona Area Hospice Services  
 Winona Health Foundation

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*Health Grants Total* *\$31,280*

## HUMAN SERVICE

American Red Cross - Winona County Chapter  
 Apple Tree Dental  
 Big Brothers / Big Sisters of Greater Winona  
 Birthright  
 Bluff County Family Resources  
 Boys Scouts of America  
 Boys Scouts of America - Northern Tier  
 Breast Cancer Research  
 Catholic Charities - Winona Diocese  
 Catholic Relief Services  
 Family and Children's Center  
 Food for the Poor, Inc.  
 Goodfellows Fund of Winona  
 Grace Place  
 Habitat For Humanity  
 Home and Community Options  
 Hope Coalition  
 Lakeland Hospice & Home Care Foundation  
 New Hope Village  
 Salvation Army  
 Samaritan's Purse  
 SEMCAC  
 Southeast MN Rural Education & Resource Center  
 St. Elizabeth's Hospital of Wabasha  
 United Way of Greater Winona Area  
 Winona County DAC  
 Winona Early Childhood Initiative  
 Winona ORC Industries Inc  
 Winona Volunteer Services  
 Womens Resource Center of Winona  
 Wounded Warrior Project

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*Human Service Grants Total* *\$302,114*

## RELIGIOUS

Campus Crusade For Christ, Inc.  
 Cathedral of the Sacred Heart  
 Central Lutheran Church  
 Desiring God Disabilities Ministries  
 Diocese of Winona  
 Diocese of Winona Foundation  
 Evangelical Free Church of America  
 Focus on the Family  
 Goodview Trinity Lutheran Church  
 Hermits of St. Mary of Carmel  
 Immaculate Heart of Mary Seminary  
 Lighthouse Ministries  
 Our Lady Help of Christians Parish  
 Pleasant Valley Evangelical Free Church  
 Saint Patrick's Cathedral  
 San Marco Church  
 Sisters of St. Joseph of Carondelet  
 St. Stanislaus Church  
 St. Thomas Aquinas Newman Center  
 St. Mary's Catholic Church  
 Voice of the Faithful

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*Religious Grants Total* *\$92,565*

## OTHER

Child Fund International  
 Deep Portage Learning Center  
 Eagle Bluff Environmental Learning Center  
 Grants to Other Funds  
 Heifer International  
 National Eagle Center Eaglewatch  
 Rushes Wilderness Foundation  
 St Mary's Cemetery of Winona  
 Student Financial Services  
 Winona Area Humane Society  
 Yosemite Conservancy

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*Other Grants Total* *\$194,471*

# 2013 General Fund Grants

2013 General Fund Grants Total  
**\$26,500**

*The Winona Community Foundation Board makes grants from our General Fund in various ways throughout the year. This Community granting is done through a competitive process with awards going to area non-profit organizations for projects meeting community needs. Applications are reviewed based on established criteria, by our volunteer Grants Committee. Other granting from this pool of assets (General Fund) is through our Winona Fund, which awards modest grants responding to current community unforeseen needs that may not fit within the competitive granting process.*

## COMMUNITY ORGANIZATIONS

Hiawatha Valley Education District

Hiawatha Valley Mental Health Center

Let's Go Fishing - Winona Chapter

Project FINE

Riverfront Foundation

Sports Mentorship Academy

Winona Area Catholic Schools

Winona Area Public Schools Foundation

Winona County DAC

Winona County Historical Society

Winona ORC Industries, Inc.

Winona Park Development - Lake Bike Path

Youth in Philanthropy:

Goodview Elementary School

Home and Community Options, Inc.

Winona Area Catholic Schools

Winona Volunteer Services

## LEGACY SOCIETY

Funds may be created to support philanthropic goals now, or to benefit the community in the future. The Legacy Society of the Winona Community Foundation recognizes people who have provided for future gifts to the community through bequests, charitable trusts, charitable gift annuities or life insurance. Those individuals who have qualified in the past or currently have agreed to be listed as members of the Legacy Society include:

Erika & Robert Gilbertson

Nancy & Mark Kristensen

Helen Leaf Haun

Dr. Thomas E. & Leone J. Mauszycki

Jennie L. Pierce

Judy & Charles Shepard, M.D.



## GOODFELLOWS FUND

In 2013 the Winona Community Foundation partnered with the Winona Daily News to administer the paper's Goodfellows Fund, which has provided warm winter clothing to needy children since 1900. The fund operates entirely on private donations, and in recent years has provided \$40 vouchers to more than 600 children each year in kindergarten to sixth grade. The Daily News is pleased with the new partnership, noting that the foundation is a perfect fit to provide resources for the program, given the foundation's mission, focus and strong community ties.

# Preparing for the Future

## REASONS TO START A FUND AT THE WINONA COMMUNITY FOUNDATION...

Maximize tax benefits

Preserve financial assets to support your community

Invest in the future of your philanthropic passion

Document your wishes, plan your legacy

Demonstrate your philanthropy & be part of the solution by creating long-lasting, positive change

Ensure that WCF has a secure basis of funding for the years ahead

Boost your effectiveness with access to resources and tools in line with philanthropy

Join a group of Friends that share your passion of philanthropy

You want to honor a loved one by making a gift in his or her name

You want to have an impact now and don't know where to start

*Donors interested in starting a fund should meet with the Winona Community Foundation staff to review specific details, which will then go to the Foundation's Board for approval. The staff will be happy to discuss types of funds with anyone interested. Start now on your way to being a Philanthropist.*

## STARTING MADE EASY & PAINLESS

Starting a Seed Fund can be an individual or family endeavor. The paperwork is quick and easy.

- Gifts to a Seed Fund account can be made using cash, credit card, stocks or mutual funds
- A minimum of \$500 is required to open a Seed Fund
- A minimum annual contribution commitment of at least \$250 is requested, \$500 suggested, until the fund reaches \$5,000, with the target of reaching this ten (10) years from the date of opening the Seed Fund
- Gifts are tax-deductible
- Once the \$5,000 mark is reached, the fund may be endowed or noted as a pass-through fund that can operate as one of several different types such as donor advised, designated, field of interest or scholarship fund. The possibilities are limitless!

The normal start-up fee is waived when the fund reaches a full size of \$5,000 for being a component fund of the Foundation.

## FOUNDERS FUND

The Founders Fund was created to honor all of the individuals who planted the seed for the start of Winona Community Foundation in the 1980s. This endowed fund awards dollars to a local non-profit chosen in the name of an individual or organization who has clearly touched community life for all time. Past recipients of this award include:

Louis De Thomasis, Saint Mary's University,  
Past President

Dr. Darrell Krueger, Winona State University,  
Past President

Ms. Gloria Ames, Community Volunteer

Tim Burchill, Past Development Program at  
Saint Mary's University of Minnesota

Sue Cornwell, Community Leader & First  
President of WCF

The Winona Hims

Patte Peterson, Past Board Member of Winona  
Community Foundation

# Planned Giving

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*Everyone should have an estate plan to ensure that their hard-earned assets reach loved ones and organizations held dear. Part of planning your estate intelligently may include maximizing the taxes you save by increasing the dollars you give. Proper estate planning could reduce or potentially eliminate estate taxes through planned giving.*

If your estate is quite large and contains highly appreciated property it may be possible to gift to charity while passing more to your heirs than otherwise would be possible without the charitable gift.

Giving strategies may span the range from simple to very complex. They may include giving during one's lifetime, by bequest, or both. This article will focus on giving after death.

Effective estate planning usually takes time, effort and a good attorney. Proper planning allows your family to avoid the delay, dissension and needless expense that often occurs when a loved one dies intestate. Also, I recommend that you talk with your family about what your intentions are and why you made the choices you have made thereby potentially minimizing disputes and/or disappointment after you pass.

## **PLANNED GIVING - WHAT IS IT?**

A "planned gift" is a gift that will be distributed at some point in the future. The easiest way to make a planned gift is by designating the charitable organization as a beneficiary in your Last Will and Testament or in your Trust. The charitable organization can also be named as a beneficiary of a life insurance policy, annuity contract, or retirement account.

## **AVOID TAXES**

Making a charity the beneficiary of your Traditional IRA, 401(k) or other qualified plan allows you to forego income and estate tax levied on these plans on the Federal and State levels. This means that, in most situations, your donation is worth more to the charity than to your heirs.

## **BE SMART**

Typically it is smart to give the most-taxed asset in your estate to charity and leave the more favorably taxed property to your heirs. Making a planned gift assures that when you are gone your resources will keep giving to the future of that charity.

## **CURRENT LIMITS**

The 2013 Estate Tax Exemptions are \$1,000,000 in Minnesota and \$5,250,000 Federally. This means that you can pass up to \$1,000,000 Estate Tax free to the person or place of your choosing.

# Community General Fund Donors

*The Foundation's Community General Fund is the resource from which grants are allocated to organizations in the Winona area. Competitive grant applications are submitted and funding is based on a set of granting guidelines and criteria.*

## GENERAL DONORS

Mike & Linda Cichanowski

Elizabeth Bach

Eric & Cathy Bartleson

Brian & Sandra Burke

Dennis & Vicki Decker

Fran Edstrom

Bob & Erika Gilbertson

Gary & Jean Hayes

Barbara Burchill & Sarah  
Henrickson

Robert & Suzanne Hoodecheck

David & Joyce Keller

Dale & Linda Kukowski

Kevin Possin & Ann Lavine

Bill & Shelly Leaf

William Lindquist

Doug Lofthus & Cynthia Marek

John & Shelley Milek

John & Marlene Mulrooney

Sylvia Nickel

Scott & Kelley Olson

Carol Orlowski

Corwin & Arvie Osterloh

Todd & Elizabeth Paulson

Patricia Peterson

Charles & Judy Shepard

Stephen & Barb Slaggie

Ronald & Diane Stevens

Gary & Debra Watts

Tom & Barb Wynn

## BUSINESSES

Fillmore Family Resources

Winona National Bank

## FOUNDATIONS/OTHER

Bristol -Myers Squibb Foundation

Langenau Legacy

Lee Foundation

Venables Foundationwa

## BK 5K YOUTH FUND OF WCF

The BK 5K Road Race will hold its 14th annual race this year on Saturday, June 14th. The annual 5 kilometer road race and walk is held to honor Bob Kierlin, founder of Fastenal and lifelong supporter of youth programs. Over the years, BK 5K funds have been awarded for band instruments, books for challenge English courses, iPads for classroom use, laptops for people working to connect youths and mentors, various sports equipment and facility upgrades (e.g., new baseball and Nordic ski gear, skateboard park improvements), funds for STEM programs and Daycare/Pre-school programs, as well as running camp fee reductions, canoes to encourage the use of our beautiful rivers and lakes – and so much more.



In 2013, the BK 5K Youth Fund provided more than \$165,000 to the Winona area youth organization grantees. The number of grant applicants is growing with the growth in funds raised and we're very happy to say that we have never had so many qualified grant applications come in and be awarded. We're thrilled to support so many great causes that provide Winona area youth with opportunities to improve themselves and develop their talents.

*Submitted by BK5K Committee*



## MID WEST MUSIC FEST

Mid West Music Fest (MWMF) is a three day music fest showcasing over 100 musicians in 13 different venues throughout downtown Winona. MWMF is an all-ages, multi-genre festival where the 'best of the Mid West' joins local and regional up-and-coming acts in celebration of community and music. Founded by Sam Brown, MWMF celebrated its fourth year in 2013 with the intention of continuing on for years to come. Every year the festival grants some of the profits to charity, in 2013 the children's library was the recipient of the grant.

*For more information about MWMF contact:  
Parker Forsell at [parker.f@midwestmusicfest.org](mailto:parker.f@midwestmusicfest.org)!*

*Submitted by Parker Forsell*

## FROZEN RIVER FILM FESTIVAL

The 2014 Frozen River Film Festival saw its ninth year as a successful festival. Films were shown and events held on all three Winona college campuses and throughout downtown Winona. The theme this year was 'Civic Engagement, and patrons were able to view a wide variety of documentary films, participate in open dialect with speakers, and talk with local community organizations about topics relating to this theme. The festival seated 3,300 individuals throughout the 40 film sets offered the weekend of the festival.

During this same weekend, the festival had the best attendance ever for the children's program, which included an excellent film set, a National Eagle Center presentation, a puppet show and craft activities. The highest film set attendance was for a group of films that included 'Paradise Found', 'Keeper of the Mountain' and

'Mysteries of the Driftless', with almost 400 people attending. We will celebrate our 10th year with a change of dates to February 18-22, 2015, and look forward to another successful festival! Thank you for your continued support!



*Photo by Keelie Ritter*

*Submitted by Crystal Hegge*

# In Memory Of..

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## David Wieczorek

Janet I. Ahlgren  
H. J. & Rose Marie Andersen  
Bob & Marilyn Anthony  
Sandra D. Arbour  
Michelle A. Banicki  
Bruce & Sandra Bauer  
John Gabbert & Joyce Belgum  
Bradley & Kathryn Benke  
Walter & Virginia Bennick  
Kathrene P. Benter  
Louie & Mary Born  
C. R. Bradley  
Rosemary Broughton  
David & Kathleen Christenson  
George & Mariyn Cipov  
Sheila M. Cunningham  
Jane C. Cyrus  
Judy Danielson  
Henry & Audrey Deblon  
Mary Dettinger  
James & Mary Eddy  
Mary Kay Eddy  
Robert J. Stuber & Mary L. Eischen  
Donna J. Ernst  
O. J. & Karen Fawcett

Anna Maria E. Fitzmaurice  
S. W. Pollock & L. J. Foote  
Julie A. Galewski  
Jani V. Giaquinto  
Shirley A. Gierok  
Rodney & Nancy Gillespie  
Gayle Goetzman  
Carole Gorden  
Susan Haedtke  
David & Carol Hager  
Charles & Constance Hamilton  
Charles R. Haugh & J. Eileen Gallagher  
Haugh  
Debra K. Herrick  
Donald L. Stone & Carol L. Heyl  
Florence L. Hollingsworth  
MCHS Holmen Clinic Staff  
Robert & Suzanne Hoodecheck  
Eric Christensen & Donna J. Kamann  
Michael & Jean Kertzman  
Kevin & Whitney Langlois  
Timothy & Kathleen Mason  
Karen A. Matzke  
Dr. Robert C. McMahon  
Merchants Bank  
John & Mary Merchlewitz

Randy & Susan Murphy  
Gerald & Patricia Neal  
Janice F. Neitzke  
Dennis & Patricia Nolan  
Debra J. Norton  
Jeanne Olmstead  
William & Pamela Peterson  
Mark & Barbara Pozanc Sr.  
Robert & Susan Priem  
David & Kayla Ritter  
John P. Rukavina  
Charles & Judy Shepard  
Eileen J. Stever  
Carole A. Stever  
George Stever  
Linda L. Theis  
Thomas & Deborah Thompson  
Vanessa J. Van Hoof  
Jerry & Sandi Van Hoof  
Kenneth & Theo Marie Venus  
Greg & Mary Volkart  
Peter & Kay Walsh  
Richard & Yvonne Wantock  
Larry & Rita Wieczorek  
Katy Anthony & Elaine R. Wieczorek  
Jeffrey & Virginia Wilzbacher

Wisniewski Family  
Barbara E. Burchill  
Sylvia Markham & Hiawath Valley  
Education Association

## Tim Burchill

Barbara E. Burchill

## Mark Morris

Sylvia Markham & Hiawath Valley  
Education Association

# In Honor Of

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## Helen Haun

Bill & Shelly Leaf  
Paul Leaf  
Robert & Deb Leaf

## John & Carolyn Collins

Gary & Jean Hays

## Ray & Carolyn Felton

Sylvia Nickel

# Winona Community Foundation

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Winona, MN 55987

*Demonstrate your philanthropy and  
be part of the solution by creating  
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