



Fort Atkinson Community Foundation 2015-16 Annual Report

A gift today, a legacy tomorrow

Enclosed is my donation of \$ _____

Name: _____

Address: _____

Fund/Note: _____

Send to:
Fort Atkinson Community Foundation
244 N. Main St.
Fort Atkinson, WI 53538

Credit card donations can be made on our
secure website, www.fortfoundation.org.

*"Thank you for your incredibly
generous contribution to not
just my college career, but to
my entire future."*

Aine Gaffney, 2016 FAHS
graduate, recipient of three
Foundation scholarships, and
student at Carthage College.



Embraced Playground at Jones Park

**Where gifts today
build better tomorrows**

www.fortfoundation.org

Investing in Our Community

Dear Community,

The Board of Directors of the Fort Atkinson Community Foundation is pleased to present its June 30, 2016 fiscal year financial report.

This past year, the Foundation invested in our community by distributing 26 grants totaling \$422,487. It was a year focused on 'play' for the Foundation as we helped fund playground equipment at Barrie and Luther Elementary schools as well as in Jones Park; a music trailer to transport equipment for our school district's performing arts department; and lighting and technical upgrades in the high school auditorium.



*PlayWeb for
Luther School*

Our fabulous scholarship program continued to grow as we added the Make a Difference and Vance scholarships to our portfolio. These two additions pushed our scholarship fund assets over the \$4 million mark for the first time in Foundation history. We were pleased this year to make 118 scholarship payments, totaling \$260,204, helping our students pay for college and prepare for their future.



2016 Walter and Louise Buell Merit Scholarship recipients with FAFS chairman Dean Brown

Of course, all these investments in our residents and in our community are only possible thanks to the ongoing generosity of our donors. Whether you have given \$25 to our General Fund or \$25,000 to our Friends of Haumerson's Pond Fund, we are deeply grateful for your support. You make all that we do possible.

Sincerely,
Dean Brown
FAFS chairman



Extension of the downtown Riverwalk

YOUR COMMUNITY FOUNDATION

The Fort Atkinson Community Foundation was established in 1973 with an initial gift of \$25,000.

Now, thanks to the steadfast generosity of the community it serves and the careful stewardship of community leaders, the Foundation's assets have grown to well over \$22 million.

As our assets have increased, so too has our ability to make a difference. We are pleased to report that over the past 43 years, the Foundation has granted awards totaling over \$19 million, helping make our community such a special place to live, work and play.

The Community Foundation is a 501(c)3 organization. Your contribution is fully tax deductible.



New music trailer for school district's performing arts program

BOARD OF DIRECTORS

Dean Brown, chairman
 Christopher Rogers, vice-chairman
 Mary Behling
 Kristin Wallace
 Scott Housley
 W. Phil Niemeyer, past chairman

Annual Financial Report, Year Ending June 30, 2016

[figures rounded to nearest dollar]

Assets on July 1, 2015		\$22,469,454	
Assets on June 30, 2016		\$ 3,962,708	
General Fund			
Scholarship Funds:			
AAUW Second Chance	256,973		
Band Booster	7,959		
Batterman Family	35,584		
Walter/Louise Buell	1,456,642		
Orrin/Margaret Bull	5,661		
Dahnert Memorial	25,891		
Fitzpatrick Educator	22,291		
Hake Agriculture	160,511		
Hake Engineering	133,026		
Halker Memorial	8,625		
Harrison Education	46,431		
Jones Dairy Industrial Ed	54,244		
Robert/Judith Knapp	62,110		
Knox AAUW	196,248		
James/Frances Luther	38,036		
Make a Difference	82,835		
Mathews Education	43,675		
Medical Careers	197,238		
Pay It Forward	33,190		
Rose Inspire-a-Dream	85,720		
Russell Athletic	98,262		
Ralph/Clara Rutledge	161,360		
Schreiner Memorial	321,211		
Maurice/Clara Staller	112,823		
Thrift Shop/Jean Reich	32,381		
Jim/Lee Vance	224,065		
Dr. Sydney Weidemann	92,691		
Wiederhoeft Legacy	57,907	4,053,588	
Field of Interest Funds:			
Beautification Fund	248,863		
Boys & Girls Club Inv.	26,050		
Dwight Foster Library	23,633		
Doris Highsmith	178,721		
Mary C. Hoard	10,431,692		
Bertha/Marilyn Kuhl	1,953,253		
Carol Liddle	62,117		
Lorine Niedecker	5,154		
Pope Memorial Art	68,360		
Senior Citizens Center	49,652		
Phyllis/Bob Zeimen	250,558	13,298,053	
Acorn Funds:			
Vincent Memorial	8,284	8,284	

Donor-Advised Funds			
Elizabeth Jones Chisholm	10,180		
Gordon F. Day Family	10,599		
Kerschensteiner Family	407,307		
Negus Family	113,889		
Schafer Family	186,805		
Vance Family	70,520	799,299	
Pass-Through Project Funds			
Boys & Girls Club	95,878		
Embraced: Jones Park	2,013		
Fire Department	126		
Friends of Haumerson's Pond	205,073		
Friends of McCoy Park	16,861		
K9 Veterans Memorial	28,906		
Performing Arts	230		
Police Department	5,962		
Project LEAD	19,404		
Rock River Heritage	2		
Don Schink Memorial	2,797		
Water Tower	6,858	384,110	
Pass-Through Scholarship Funds			
Barrie Elementary School	5,034		
Eagle Scout/Gold Award	7,553		
ELL Bilingual Student	141		
Fort Half Marathon	6,003		
Lloyd Hake Memorial	36,209		
Karrels AP Computer Science	31,047		
Luther Elementary School	2,501		
Jake Meinert Memorial	2,739		
Purdy Elementary School	11,224		
Rockwell Elementary School	2,504	104,955	
Total Balance, June 30, 2016			\$22,610,998

Summary

Balance at July 1, 2015			\$22,469,454
Plus:			
Interest and Dividends	469,868		
Investment Gain/Loss	(288,776)		
Contributions Received	859,239		
Minus:		23,509,785	
Administrative Expenses	92,306		
Investment Management	124,789		
Charitable Disbursements	681,691		
Balance at June 30, 2016			\$22,610,998

MAKE A GIFT TO YOUR COMMUNITY

Gifts can be made to the Foundation's General Fund, which supports our operations as well as many of our grants, helping us react and respond to the changing needs of the community.

Donors may also make a gift to any of the funds listed at left or consider establishing a new fund of their own, leaving a legacy to their community. We offer a variety of fund options and will work closely with you to help you realize your charitable goals.

To learn more about our funds or ways of giving, please visit www.fortfoundation.org or contact FAF program administrator Sue Hartwick by phone at (920) 563-3210 or via email at facf@fortfoundation.org.

"Thank you for your support as I pursued my dreams and ultimately achieved a lifelong goal."

Olivia Ault, 2012 FAHS graduate, recipient of annual Theodore Batterman Family Scholarship - and 2016 college graduate!



2016 Batterman Family Scholarship recipients with presenter Anna Courtier



Fort Atkinson Community Foundation

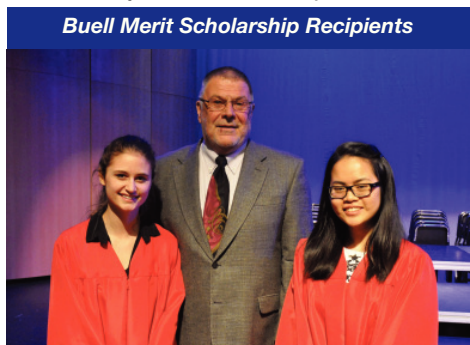
"Where Gifts Today Build Better Tomorrows"

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Buell Merit Scholarship Recipients

Our fabulous scholarship program continued to grow as we added the Make a Difference and Vance scholarships to our portfolio. These two additions pushed our scholarship fund assets over the \$4 million mark for the first time in Foundation history. We were pleased this year to make 118 scholarship payments, totaling \$260,204, helping our students pay for college and prepare for their future.



Riverwalk Extension

Of course, all these investments in our residents and in our community are only possible thanks to the ongoing generosity of our donors. Whether you have given \$25 to our General Fund or \$25,000 to our Friends of Haumerson's Pond Fund, we are deeply grateful for your support. You make all that we do possible.

To learn more about making a gift, setting up a fund, or applying for grants, please visit our website, www.fortfoundation.org or call Program Administrator Sue Hartwick at (920) 222-1191 or email her at facf@fortfoundation.org.

Sincerely,
Dean Brown, chairman

Board of Directors

Dean Brown Christopher Rogers Mary Behling
Kristin Wallace Scott Housley



Music Trailer for School District



Embraced Playground at Jones Park

"Thank you for your incredibly generous contribution to not just my college career, but to my entire future."
Aine Gaffney, 2016 FAHS graduate, recipient of three Foundation scholarships, and student at Carthage College.

ANNUAL FINANCIAL REPORT

Year ending June 30, 2016

(All figures rounded to the nearest dollar)

Assets at Beginning of Year, July 1, 2015		\$22,469,454
Assets as of June 30, 2016		
General Fund:		3,962,708
Endowed Scholarship Funds:		
AAUW Second Chance	\$256,973	
Band Booster	\$7,959	
Batterman Family	\$35,584	
Walter and Louise Buell	\$1,456,642	
Orrin and Margaret Bull Family	\$5,661	
Jason Dahnert Memorial	\$25,891	
Dr. James/Therese Fitzpatrick Educator	\$22,291	
Ben & Ada Hake Agriculture	\$160,511	
Jerome Hake Engineering	\$133,026	
Gene Halker Memorial	\$8,625	
Eileen Harrison Education	\$46,431	
Jones Dairy Farm Industrial Ed	\$54,244	
Robert and Judith Knapp	\$62,110	
Jane Knox A.A.U.W.	\$196,248	
James and Frances Luther	\$38,036	
Make a Difference	\$82,835	
Isabelle Matthews Education	\$43,675	
Medical Careers Scholarship	\$197,238	
Pay it Forward	\$33,190	
Rose Inspire-a-Dream	\$85,720	
Dr. James Russell Athletic	\$98,262	
Ralph and Clara Rutledge	\$161,360	
Juanita Schreiner Memorial	\$321,211	
Maurice and Clara Staller	\$112,823	
Thrift Shop/Jean Reich Memorial	\$32,381	
Jim and Lee Vance	\$224,065	
Dr. Sydney Weidemann	\$92,691	
Ardell Wiederhoeft Legacy	\$57,907	\$4,053,588
Donor-Advised Funds:		
Elizabeth Jones Chisholm Fund	\$10,180	
Gordon F. Day Family Fund	\$10,599	
Kerschensteiner Family Fund	\$407,307	
Negus Family Fund	\$113,889	
Schafer Family Fund	\$186,805	
Vance Family Fund	\$70,520	\$799,299
Field of Interest Funds:		
Beautification Fund	\$248,863	
Boys and Girls Club Inv. Fund	\$26,050	
Dwight Foster Library Fund	\$23,633	
Doris Highsmith Social Services Fund	\$178,721	
Mary C. Hoard Fund	\$10,431,692	
Bertha and Marilyn Kuhl Fund	\$1,953,253	
Carol Liddle Fund	\$62,117	
Lorine Niedecker Fund	\$5,154	
Pope Memorial Art Fund	\$68,360	
Senior Citizens Center Fund	\$49,652	
Phyllis and Bob Zeimen Fund	\$250,558	\$13,298,053
Acorn Funds:		
Robert Vincent Memorial Fund	\$8,284	\$8,284
Scholarship Pass-Through Funds:		
Barrie Elementary School	\$5,034	
Eagle Scout and Gold Award	\$7,553	
ELL Bilingual Student	\$141	
Fort Half Marathon	\$6,003	
Lloyd Hake Memorial	\$36,209	
Ed Karrels AP Computer Science	\$31,047	
Luther Elementary School	\$2,501	
Jake Meinert Memorial	\$2,739	
Purdy Elementary School	\$11,224	
Rockwell Elementary School	\$2,504	\$104,955
Project Pass-Through Funds:		
Boys and Girls Club	\$95,878	
Embraced: Jones Park	\$2,013	
Fire Department Fund	\$126	
Friends of Haumerson's Pond	\$205,073	
Friends of McCoy Park	\$16,861	
K9 Veterans Memorial	\$28,906	
Performing Arts Fund	\$230	
Police Department Fund	\$5,962	
Project LEAD	\$19,404	
Rock River Heritage Fund	\$2	
Schink Memorial Fund	\$2,797	
Water Tower Fund	\$6,858	\$384,110
Total Fund Balance, June 30, 2016		\$22,610,998
Contributions Received This Year:		
General Fund		\$9,809
Endowed Scholarship Funds:		
AAUW Second Chance	\$94,070	
Batterman Family	\$57,000	
Jason Dahnert Memorial	\$2,355	
Dr. James/Therese Fitzpatrick Educator	\$1,225	
Ben and Ada Hake Agriculture	\$30,144	
Jerome Hake Engineering	\$30,144	
Robert and Judith Knapp	\$7,500	
Jane Knox A.A.U.W.	\$2,745	
Make a Difference	\$80,195	
Pay it Forward	\$2,130	
Rose Inspire-a-Dream	\$1,200	
Dr. James Russell Athletic	\$154	
Juanita Schreiner Memorial	\$200	
Thrift Shop/Jean Reich Memorial	\$600	
Ardell Wiederhoeft Legacy	\$500	\$310,162

Donor-Advised Funds:		
Day Family Fund	\$500	
Negus Family Fund	\$10,082	
Vance Family Fund	\$264,934	\$275,515
Field Of Interest Funds:		
Beautification Fund	\$10,050	
Dwight Foster Library Fund	\$6,651	\$16,701
Acorn Funds:		
Robert Vincent Memorial Acorn Fund	\$25	\$25
Scholarship Pass-Through Funds:		
Barrie Elementary School	\$500	
Eagle Scout and Gold Award	\$4,710	
Fort Half Marathon	\$6,120	
Lloyd Hake Memorial	\$30,144	
Ed Karrels Computer Science	\$8,165	
Luther Elementary School	\$516	
Purdy Elementary School	\$2,000	\$52,155
Project Pass-Through Funds:		
Boys and Girls Club	\$45,357	
Embraced: Jones Park	\$1,700	
Friends of Haumerson's Pond	\$95,836	
Friends of McCoy Park	\$2,000	
K9 Veterans Memorial	\$29,050	
Performing Arts	\$340	
Police Department Fund	\$5,990	
Project LEAD	\$12,679	
Rock River Heritage Fund	\$1,200	
Water Tower Fund	\$721	\$194,872
Total Contributions Received This Year:		\$859,239
Charitable Disbursements:		
General Fund:		\$1,250
Endowed Scholarship Funds:		
AAUW Second Chance	\$6,600	
Batterman Family	\$55,500	
Walter and Louise Buell	\$73,638	
Jason Dahnert Memorial	\$3,500	
Ben and Ada Hake Agriculture	\$9,000	
Jerome Hake Engineering	\$11,000	
Gene Halker Memorial	\$400	
Eileen Harrison Education	\$2,000	
Jones Dairy Industrial	\$2,500	
Robert and Judith Knapp	\$2,500	
Knox A.A.U.W.	\$12,100	
James and Frances Luther	\$1,700	
Isabelle Matthews Education	\$2,000	
Medical Careers	\$8,000	
Pay It Forward	\$1,200	
Rose Inspire-a-Dream	\$500	
Dr. James Russell Athletic	\$4,000	
Ralph and Clara Rutledge Memorial	\$7,500	
Juanita Schreiner Memorial	\$13,616	
Maurice and Clara Staller	\$3,750	
Thrift Shop/Jean Reich Memorial	\$2,500	
Dr. Sydney Weidemann	\$8,000	
Ardell Wiederhoeft Legacy	\$3,700	\$235,204
Donor-Advised Funds:		
Negus Family Fund	\$5,000	
Vance Family Fund	\$13,000	\$18,000
Field of Interest Funds:		
Beautification Fund	\$38,376	
Mary C. Hoard Fund	\$128,000	
Bertha & Marilyn Kuhl	\$53,689	
Carol Liddle Fund	\$1,746	
Pope Memorial Art Fund	\$1,150	
Phyllis & Bob Zeimen Fund	\$19,300	\$242,261
Scholarship Pass-Through Funds:		
Eagle Scout and Gold Award	\$250	
Ed Karrels Computer Science	\$10,000	
ELL Bilingual	\$1,250	
Fort Half Marathon	\$6,000	
Lloyd Hake Memorial	\$5,000	
Luther Elementary School	\$500	
Jake Meinert Memorial	\$1,000	\$24,000
Project Pass-Through Funds:		
BG Club Rose Mem. Fund	\$1,077	
Embraced: Jones Park	\$11,581	
Friends of Haumerson's Pond	\$131,602	
Friends of McCoy Park	\$574	
Performing Arts Fund	\$340	
Project LEAD	\$6,288	
Rock River Heritage Fund	\$1,195	
Water Tower Fund	\$8,320	\$160,976
Total Charitable Disbursements This Year:		\$681,691
Summary: Balance at July 1, 2015		\$22,469,454
Interest and Dividends	\$469,868	
Gain on Investments	-\$288,776	
Contributions Received	\$859,239	\$1,040,330
Balance Before Expenses/Disbursements		\$23,509,784
Administrative Expenses	\$92,306	
Investment Management	\$124,789	
Charitable Disbursements	\$681,691	\$898,786
Balance at June 30, 2016		\$22,610,998

Donations to the Fort Atkinson Community Foundation - a 501(c)3 charitable organization - are tax-deductible.

Enclosed is my donation of \$_____ to help enhance the quality of life in Fort Atkinson.

Fund _____

Name _____

Address _____

MAIL TO: Fort Atkinson Community Foundation
244 N. Main St.
Fort Atkinson, WI 53538

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