

## The 3 in 5 Campaign

Throughout its history, the United Way of Martin County Foundation has relied on the generosity of people who care. People like you and your neighbors who believe in making a difference in the lives of others less fortunate.

The tradition continues with the launch of the Foundation's 3 in 5 Endowment Fund Campaign to raise \$3 million dollars in five years. The Inaugural Frances Langford Humanitarian Award Luncheon on Feb. 15, 2011 served as the platform to announce this Campaign, which will culminate in 2015. We are grateful to the Frances Langford Foundation for their generous pledge of \$300,000 to launch the Campaign.

Now it's time to turn to people like you, caring citizens, who want to make a gift that will keep on giving more than your lifetime. Your reasons for making a gift to the Foundation are personal and unique.

Perhaps you are grateful for a United Way volunteer experience and want to give something back. Maybe you would like to leave a legacy to benefit future generations in Martin County. Quite possibly you feel passionate about supporting an important cause or issue, such as health care for children, mental health services for seniors or agency care for the disabled.

Whatever your reason might be, you will find the United Way Foundation's Endowment Fund is a trusted fiscal agent to carry forward your voice, values and vision efficiently and effectively.

## The Endowment Fund

When you make a gift to the Endowment Fund, you make a gift for perpetuity. The income earned on the principal of the investments in the endowment is used to fund unmet community needs. Gifts to the endowment expand the Foundation's permanent financial base. A strong and substantial endowment fund creates a predictable source of future income to sustain and grow the Foundation's mission in the community.

## Ways to Give

You can give an outright gift of cash, stocks, bonds or other negotiable securities, or you can defer your gift, through a bequest in your estate plan, will or trust. You can also make the United Way of Martin County Foundation Endowment Fund, the beneficiary of your IRA or your life insurance policy. The information in this report is of a general nature. Please contact your financial and legal advisors about the many ways available for you to meet both your financial and charitable goals.

*To obtain additional information about this unique income/gift vehicle, and other gifting opportunities to the Foundation, please contact Margaret May Damen, CFP®, CLU, ChFC, Director of Planned Giving, by calling (772) 283-4800, ext. 226 or sending an e-mail to [mdamen@unitedwaymartincounty.org](mailto:mdamen@unitedwaymartincounty.org)*

***Please remember the United Way of Martin County Foundation, Inc.  
in your will and estate plan and tell us so we can say thank you!***



# 2010-11 PRESIDENT'S REPORT



## VOICE

## VALUES

## VISION

*The United Way Foundation is an independent public charity uniquely positioned to accept legacy gifts and build an endowment fund to meet the current and future unmet needs of Martin County.*

*"We make a living by what we get;  
we make a life by what we give."*

*- Sir Winston Churchill*

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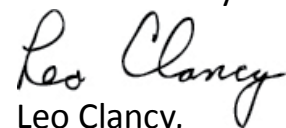
## President's Message

I am pleased to report that the United Way of Martin County Foundation had a productive year on many dimensions – board strengthening, community contribution and fundraising.

- Welcomed two community leaders to the board:  
Charles Cleaver, Assistant Vice President of Finance, Martin Memorial Health Systems  
Brian Powers, President of Indiantown Gas Company
- Distributed Funds to:  
CHARACTER COUNTS!, Joseph Kordick Legacy Gift; Public charities, Stewart Donor Advised Fund; Hope Rural School; Council of Aging; CHARACTER COUNTS!, Geoff Reynolds Donor Advised Fund
- Hosted the inaugural Frances Langford Humanitarian Award luncheon recognizing Bob and Carol Weissman – two extraordinary philanthropists. Their award was a signature bronze sailfish by internationally acclaimed sculptor Geoffrey Smith. The luncheon also provided the Foundation the opportunity to review its history, mission and objectives with 354 attendees.
- Formally launched the Foundation's ambitious \$3 Million in 5 Years Endowment Fund at the aforementioned luncheon. The Fund's program received a tremendous "kick-off" at the luncheon, when Evans Crary, Jr., trustee of the Frances Langford Foundation, announced a \$300,000 gift to the Endowment Fund.
- Commenced phase I of the mailer-personal contact program with the Foundation's individual supporters to seek their participation in the Endowment Fund via one or more of the following gifting vehicles:  
Cash or equities, pledge/deferred gifts, bequest gifts/legacy premise, annuities, will, trusts, IRA's, life insurance, Charitable Remainder Trusts and Charitable Lead Trusts
- Delivered key note remarks at the annual Martin County Estate Planning Council education day emphasizing the long term giving /Legacy Society characteristics of the Endowment Fund.

My term as president will end in June after a very full year of activity and achievement. I want to thank my board colleagues for their many contributions to the Foundation's mission. I complete my term knowing that my successor Ted Brown, Northern Trust senior vice president wealth strategies, comes fully prepared with a terrific mix of experience and leadership.

Lastly, I want to thank the Foundation's donors for their past generosity. I am very confident that they and a host of new donors will work wonders to improve the quality of life for Martin County residents.



Leo Clancy,  
Foundation President

## Board of Directors

Theodore Brown, **President**  
Chuck E. White, Jr., **Vice-President**  
Robert Thomas, CPA, **Treasurer**  
Jim Vojcsik, **Secretary**

Margaret Bradley  
Leo Clancy  
Charles R. Cleaver  
Dennis S. Hudson, III  
Brian J. Powers

Michael K. Reilly  
Mahen Sanghrajka  
Rachel Scott  
Thomas H. Thurlow, III, Esq.  
Sara Wilcox  
Richard W. Young

## Legacy Society

*The following individuals have made a donation or commitment to the Foundation through gifts, bequests, trusts or naming United Way as a beneficiary of an IRA, pension plan, life insurance or charitable gift annuity:*

Kathryn & L.J. Aubrecht Estate  
Mitchell Benedict Trust  
Margaret "Meg" Bradley  
William Brothers  
Leo & Dolores Clancy  
Mr. & Mrs. William Clark  
Debra & Robert Carttar  
Drs. Salvatore & Edith Donohue  
Katherine Dunscombe Estate  
Maxwell Friedlander Estate  
Ginny & Richard Genthe  
Stewart & Susan Hershey  
Pauline Horstman

Kenneth Hyde  
Joseph A. Kordick Estate  
Frances Langford Foundation  
Alan S. Lincoln Estate  
Maggie & David Lojpersberger  
Everett Miller Estate  
Gordon K. Miller Estate  
William & Thelma Miller Trust  
Michael & Maralyn Reilly  
Geoff Reynolds  
Harry Rosen  
Priscilla & Charles Sawicki  
Dick Schwinkendorf

Douglass & Patricia Stewart  
Edward Tatarczuk  
Barbara & Morgan Taylor  
Pete Thompson  
Daniel Todzia  
Donna & James Vojcsik  
Jill Webb-Forbes  
Carol & Robert Weissman  
William Whitemore  
Wolcott Family Foundation  
Dick & Barbara Young

## Meet Our Newest Board Members

"I believe each and every one of us has an obligation to give back to our community. We can give back by donating our time, our expertise, and of course, our money.



The United Way of Martin County Foundation gives us a unique opportunity to have a lasting impact by leaving a legacy gift to help build the Foundation's permanent endowment fund.

By giving to this fund, donors are assured that their generosity will be felt, not only now, but in the future as well."

- **Charles R. Cleaver**

"I believe in the United Way of Martin County mission and feel the Foundation ensures a legacy to fulfill this mission. I am pleased to be associated with this major community service organization."

- **Brian Powers**

