

Funding Our Future. Today.

2009 ANNUAL REPORT TO THE COMMUNITY

Funding Our Future. Today.

OUR VISION

To be the regional leader in building a more engaged, philanthropic and visionary community

OUR MISSION

To provide a trusted, local platform that enables people to give more effectively and to think strategically and creatively about the future of our community

OUR CORE VALUES

- Respect for the wishes of our donors
- Highly personalized service
- Collaboration
- Nonpartisan civil discourse
- Organizational transparency and stability
- A long-term perspective

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The Community Foundation of Northern Colorado meets National Standards for operational quality, donor service and accountability.

What are the characteristics of a truly exceptional community? The new vision statement developed by the Community Foundation of Northern Colorado's Board of Trustees answers that question with three words: engaged, philanthropic and visionary.

We believe that a primary goal for any community is to create opportunities that will move more people off the sideline and motivate their investment of time, money and creativity into something bigger than themselves. The never-ending task of the Community Foundation is just that simple and just that challenging.



Bruce Hach, Wynne Odell, Ray Caraway

*“...Foundation assets are
at an all-time high
of approximately
\$40 million...”*

Since our founding in 1975, the Community Foundation has served as the vehicle by which people have gifted tens of millions of dollars for the permanent benefit of Northern Colorado — gifts that will benefit many different nonprofit agencies, schools, churches and charitable causes *forever!* We undertake our role as stewards of these charitable funds with extraordinary commitment and are grateful for the talented professionals who donate their time and expertise to the Board of Trustees, Investment Committee and Audit Committee (see pages 14 and 16).

Although the economy has certainly slowed the growth of our assets, the role the Foundation plays in Northern Colorado has steadily increased due to your continued support. Grants, initiatives, events and projects — all made possible by you — have increased the Foundation's impact and influence. Total assets have remained relatively stable in spite of the extraordinary market volatility of recent months. As we write this letter, Foundation assets are at an all-time high of approximately \$40 million.

Thank you for contributing to this highly collaborative undertaking we call the Community Foundation. We believe it is an organization uniquely positioned to harness the collective participation, giving and perspective that will inspire and shape the future of Northern Colorado.

WYNNE ODELL
Chair

BRUCE HACH
Vice Chair

RAY CARAWAY
President

EXECUTIVE SUMMARY

GIFTS*

\$8.3 MILLION

GRANTS & PROGRAMS*

\$3.2 MILLION

NUMBER OF INDIVIDUAL FUNDS**

305

TOTAL ASSETS***

2003 2004 2005 2006 2007 2008 2009

\$14.1 MILLION

\$18.4 MILLION

\$26.2 MILLION

\$31.8 MILLION

\$37.5 MILLION

\$37.7 MILLION

\$36.5 MILLION

* JULY 1, 2008 - JUNE 30, 2009

** AS OF JUNE 30, 2009

*** FISCAL YEARS AS OF JUNE 30

FINANCIALS

COMMUNITY FOUNDATION OF NORTHERN COLORADO COMBINED STATEMENTS OF FINANCIAL POSITION

As of June 30	2009*	2008*
ASSETS		
Cash and cash equivalents	\$143,612	\$549,438
Pledges receivable, net	900	20,800
Notes & grants receivable	14,556	43,419
Prepaid expenses & other assets	15,306	22,005
Investments	35,436,723	36,191,566
Property & equipment, net	899,875	947,473
Total Assets	\$36,510,972	\$37,774,701

LIABILITIES AND NET ASSETS

Liabilities:

Accounts payable & accrued liabilities	\$54,941	\$41,949
Grants payable	12,116	8,198
Liability under split-interest agreements	563,633	689,423
Assets held for agency funds	6,020,014	6,141,326
Total Liabilities	6,650,704	6,880,896
Total Net Assets	29,860,268	30,893,805
Total Liabilities and Net Assets	\$36,510,972	\$37,774,701

* This financial statement is derived from the Foundation's accounting records. The Foundation undergoes an annual audit and the most current audited financial report is available at www.CommunityFoundationNC.org.>News>Publications and Documents.

STAY IN TOUCH

To receive the latest news from the Community Foundation, please register for our monthly e-newsletter. Visit www.CommunityFoundationNC.org and click on News > Receive Our E-Newsletter.



GRANTS

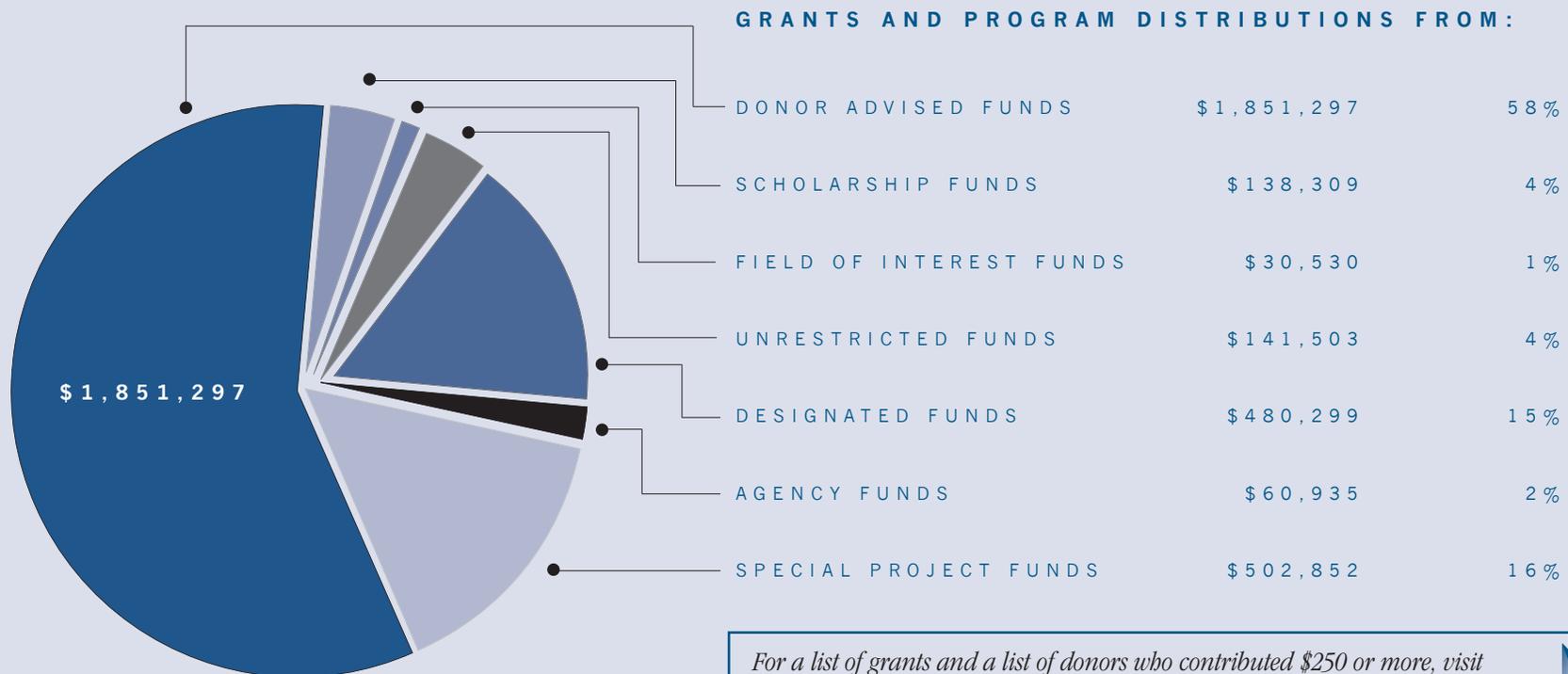
One of the key ways the Community Foundation promotes philanthropy is by investing in the vision, passion and expertise of local nonprofit organizations. During the fiscal year that ended June 30, 2009, the Community Foundation distributed \$3.2 million in grants and program expenses.

DONORS

The Community Foundation provides a trusted, local platform that enables people to give more effectively and to think strategically and creatively about the future of our community. We connect donors with the causes they care about most and encourage them to stay actively involved in grants that come from the funds they establish. We can provide information on local nonprofit agencies, schedule site visits, and connect donors through Foundation events and committees.

NONPROFIT AGENCIES

In partnership with local nonprofit agencies, we play a key role in enhancing the extraordinary quality of life the Northern Colorado region offers its residents. Through hundreds of individual charitable funds, we distribute millions of dollars into our community each year. Nonprofit staff should be aware that most of the Community Foundation's grants come from Donor Advised and Designated funds. Grants from Donor Advised funds are based on recommendations from the fund's donor advisors, and the Foundation generally does not accept unsolicited proposals. However, nonprofit agencies may highlight their needs and projects on the Community Foundation's website; we link to this page from our monthly e-newsletter. To request inclusion in the next issue, visit www.CommunityFoundationNC.org and click on Nonprofits > Be Featured on Our Website.



For a list of grants and a list of donors who contributed \$250 or more, visit www.CommunityFoundationNC.org and click on News > 2009 Year in Review.



Lois L. Kroh treasured celebrating Easter with her neighbors, the Armstrong family. She is pictured with two members of the Armstrong family, siblings Ken Armstrong and Margaret Armstrong Vera, in 2002.

Lois L. Kroh delighted in spreading joy.

Remembered for her positive attitude, sense of humor, and love for children and horses, the Loveland native was known as “the grandmother of the hill” to the children of her Namaqua Hills neighborhood.

A patron of the arts who was frugal in her personal life, Ms. Kroh provided charitable assistance whenever there was a need. She helped fund the restoration of the historic Rialto Theater; supported art shows, plays and poetry readings; and provided scholarships for young musicians.

Before passing away in 2006 at the age of 93, Ms. Kroh established a Designated fund with the Community Foundation of Northern Colorado to benefit two nonprofit agencies.

“It was a great source of comfort to her to know that grants would be awarded to support ‘her children’ through Hearts and Horses Therapeutic Riding Center and the Boys and Girls Clubs of Larimer County,” said attorney Lynn Hammond.

“The Community Foundation staff was sensitive, supportive and flexible in assisting Ms. Kroh to realize her philanthropic dreams,” Hammond said. “The Community Foundation provided a vehicle to assure her that her love for children and horses would be continued by a professionally managed entity after she was gone.”

LYNN HAMMOND FOR LOIS L. KROH ON:

CHARITABLE GOALS

Lois L. Kroh’s philanthropic work was linked to her passion for the arts and for young people. She provided significant support to arts-related activities and to programs that directly affected youth.

PHILANTHROPIC PHILOSOPHY

Lois L. Kroh felt it was her blessing and good fortune to be able to make a difference.

THE COMMUNITY FOUNDATION

I would encourage those with philanthropic dreams to explore the palette of opportunities available through the Community Foundation of Northern Colorado.

To learn more about Lois L. Kroh, visit www.CommunityFoundationNC.org and click on News > 2009 Year in Review.



Esther, 10, pets Blakken during a session at Hearts & Horses Therapeutic Riding Center in Loveland, a grantee of the Lois L. Kroh Fund. Therapy riding benefits include strengthening cognitive thinking, problem-solving, confidence-building, socialization and achieving individual goals.





Rodney Rice

The continued success of Hydro Construction Company led the business and its team members to make an easy decision: it's time to give back to the community.

The mission of the company's corporate Donor Advised fund, established in September 2008, is to enhance and enrich community programs.

"We are privileged to share this success with our community," President Rodney Rice said. "The Hydro Construction Charitable Fund allows us to more effectively manage our charitable giving. It has made it possible for us to thrive in our giving during good times and to continue giving in a down economy."

The Fort Collins business is 100 percent employee-owned and has specialized in the construction of water and wastewater treatment facilities since 1974. It has worked on many of the major treatment facilities throughout Colorado and the surrounding states. Hydro encourages employees to support nonprofit organizations in the communities where it operates, and matches donations dollar-for-dollar through its charitable fund.

"The Community Foundation makes it easy and stress-free to give back to the community," Rod said. "The staff works with us to make our charitable giving successful and rewarding. Their expertise provides us with community connections and legal resources."

RODNEY RICE ON:

CHARITABLE GOALS

Our company goals are to enhance, enrich, educate and aid in the well-being of children, elderly and families. We do so by focusing our efforts on causes rather than symptoms.

PHILANTHROPIC PHILOSOPHY

One of our core values is to give back to the community. We positively impact others through water treatment services and facilities, and by sharing our success.

THE COMMUNITY FOUNDATION

Our success can now overflow to those in need, and we feel blessed to give back. With the Foundation's help, we hope to see our charitable giving continue in perpetuity.

"The Community Foundation has longevity and an amazing reputation throughout Northern Colorado."

— RODNEY RICE

Dean, 8; David, 11; and Job, 9, develop a variety of skills while wrestling for GRIT Athletics, a future grantee of the Hydro Construction Charitable Fund. Its mission is to inspire people of all ages through sports competitions.





Bryce, Ivy and Sarah Hach
Muriel and Bruce Hach

Bruce and Muriel Hach met in high school, and have always equated their hometown of Ames, Iowa, with the meaning of “community.”

“We were both raised by our community as much as by our parents,” said the couple, who have three children. “Ames in the 1950s had strong, positive values regarding responsibility, honesty, academics, love of science, and stability of institutional structure.”

It’s those strong values that led them to establish their Donor Advised fund in September 2005. They also established a scholarship fund in August 2006 to support high school girls in Loveland with leadership skills, high academic standing, and financial need.

“We want our grants to reflect community opportunity, developmental building blocks and positive reinforcement,” Muriel said. “We want to help provide some of the same opportunities Bruce and I and our parents were privileged to receive.”

They feel fortunate that the next generation lives close by in Fort Collins to carry on the legacy of charitable giving: son, Bryce, his wife, Sarah, and granddaughter Ivy.

“With our fund, we wanted a sense of permanence and structure so that we can enjoy the benefit of time by thoughtfully planning a philanthropic strategy,” Bruce said.

BRUCE AND MURIEL HACH ON:

CHARITABLE GOALS

Through our grants, the clients of nonprofit agencies receive opportunities, growth and assistance that would otherwise be very difficult to achieve.

PHILANTHROPIC PHILOSOPHY

We like to support services that provide building blocks, upward mobility and ultimately ascendancy. In other words, services that provide individual steps toward advancement.

THE COMMUNITY FOUNDATION

The administration of a grant is not simple. The Community Foundation handles all documentation, legal obligations, letters and filings. This is a wonderful service, as well as great counsel.

“The Community Foundation handles all documentation, legal obligations, letters and filings. This is a wonderful service, as well as great counsel.”

— BRUCE AND MURIEL HACH

Sondra, coordinator of Center for Adult Learning at Front Range Community College in Loveland, sits between Tram, who is learning English, and Sara, who earned her GED and will graduate from FRCC in May. The Center is a Hach Family Fund grantee.





Volunteer Gloria walks with SAINT client Carol from her home to Gloria's car. Although she no longer drives, SAINT helps Carol continue to access all the places necessary to maintain her health and live independently.

The “Silver Tsunami” of aging Baby Boomers is coming, and Senior Alternatives IN Transportation is preparing for the ride.

The nonprofit agency has been in business for 25 years in Fort Collins and 12 years in Loveland, first as part of the City of Fort Collins Office of Volunteering, then as part of a private agency called Care-A-Van/SAINT, Inc.

SAINT recruits volunteer drivers to help senior citizens and people with disabilities stay independent by providing transportation to obtain essential goods and services. A small staff of four schedules rides and fulfills the difficult task of recruiting volunteer drivers, who use their own cars.

“It speaks very well of our Larimer County citizens that so many people are willing to take their own car and go out in all kinds of weather and traffic conditions to help the seniors and people with disabilities,” Executive Director Gary Thomas said.

With the Community Foundation managing the endowment fund, SAINT can remain focused on its mission. The nonprofit has grown more than 40 percent in the last few years. In 2008, 160 volunteers provided 20,000 rides to 500 clients.

“The Community Foundation’s support has kept our agency going and growing,” Thomas said.

“We see the SAINT Volunteer Transportation Endowment Fund as an ongoing and important part of keeping our remarkable volunteers on the road!”

— GARY THOMAS,
EXECUTIVE DIRECTOR, SAINT

When Mary Mesropian became executive director of Estes Valley Victim Advocates in 2000, the organization had just moved into a new office and hired its first counselor.

Because it serves victims of all crimes and trauma 24/7, the need for a strong financial foundation became apparent as programs expanded.

“Our endowment fund at the Community Foundation of Northern Colorado helps assure that the vital services Estes Valley Victim Advocates provide will be available well into the future,” Mary said. “Our entire community is healthier because we are all working together to assist the vulnerable in their time of great need.”

The Estes Valley Victim Advocates Endowment Fund has allowed the agency to expand by purchasing a building in 2008 that welcomes victims of domestic violence and their children. The safe house is named My Sister’s Place, in honor of long-time supporter and former Community Foundation Trustee Judy Lamy, who passed away in 2006.

“There’s a perception that domestic violence doesn’t exist in small communities and vacation areas — especially in our beautiful valley,” Mary said. “But it happens here on a regular basis. The high cost of living in the Estes Valley makes it especially difficult for domestic violence survivors to start anew.”

“The Community Foundation provides us with a measure of stability in this time of instability.”

— MARY MESROPIAN,
EXECUTIVE DIRECTOR,
ESTES VALLEY VICTIM ADVOCATES



Annette, the safe house manager for Estes Valley Victim Advocates, picks up supplies for clients at the Food Bank for Larimer County. Estes Valley Victim Advocates serves victims of all crimes and trauma.



Jenny Schultz, Barbara Schwerin and Duane Miller attended the Annual Community Breakfast.

Uniting community resources for excellence in public education.

Poudre School District Foundation funds are component funds of the Community Foundation of Northern Colorado.



The Poudre School District Foundation engages businesses, parents, district staff and individuals from the community in its mission and work, and is primarily supported by private contributions from individuals and organizations. This support provides continued funding for specific educational needs that are not currently met by state funds.

Key Programs:

- Innovative education grants for classroom projects and experiences (grants up to \$5,000 are awarded to K-12 programs). Since 2002, the Foundation has awarded more than \$600,000 in S.P.I.E. grants (Supporting Partnerships in Innovative Education) to teachers.
- Excellence in Education awards to recognize outstanding educators.
- The Closet donation program, which makes equipment, materials and furniture available to PSD teachers.
- Donor Advised funds to provide long-term support of schools and educational programs.
- Scholarships to support students heading to higher education, as well as grants to support student participation in district school activities.

To make a tax-deductible contribution, visit www.CommunityFoundationNC.org and click on PSD Foundation > Donate Now, or call (970) 490-3206. Or please make checks payable to Community Foundation of Northern Colorado, and write "PSD Foundation" in the memo line.



Photos courtesy of imagecatcher.com

Kristin Tatti watches students from Lincoln Junior High IB World School demonstrate a robot that writes during the PSDF Annual Community Breakfast on April 23, 2009.

Key Collaborations:

- Community Foundation of Northern Colorado: Through this unprecedented partnership, the Community Foundation provides much of the accounting and administrative support for the Poudre School District Foundation. This support significantly lowers its operating costs and ultimately puts more money back into Poudre School District classrooms. The two foundations also collaborated in Fall 2009 to award \$58,000 in grants to teachers. This was made possible by funding and volunteer support from the PSD Foundation's S.P.I.E. Fund and the Community Foundation's Encouraging Excellence in Education (E3) Fund.
- Poudre School District: Partnering with the school district has resulted in technology initiative programs that help build reading skills in elementary schools and in the development of the Digital Educator program that will train teachers to infuse technology into curriculum, enhancing learning and achievement.
- Poudre School District Partnership & Volunteer Center: Partnering with the PSD Partnership & Volunteer Center increased resources going to schools and created a one-stop shop for organizations wanting to give of their time, talent and treasure in the district.

GIVING OPTIONS

Working with the Community Foundation of Northern Colorado can provide great benefits that are not available to donors who create their own private foundation. The Community Foundation staff is available to liquidate property or other non-cash gifts and provide professional assistance with charitable giving.

A **Donor Advised Fund** combines convenience, flexibility and value with the expertise of a full-time, professional staff. You can create a Donor Advised Fund by signing a simple fund agreement, then advising the Foundation of your grant recommendations at any time throughout the year. Grants can be recommended by an individual, a family or a committee. You can name successor advisors, and the fund can also be a beneficiary of your will, a gift annuity or a charitable remainder trust.

A **Supporting Organization** established in partnership with the Community Foundation provides the donor with the independence of a separate legal entity and a separate board, but with the advantages of “public charity” status. Supporting Organizations can also take advantage of the administrative support and investment services already in place at the Community Foundation.

OTHER OPTIONS

Agency Funds are established by nonprofits to grow their endowments. The Community Foundation offers an investment program and planned giving services that involve complex assets, gift annuities and trust arrangements. This partnership allows agencies to focus their staff and board time on marketing and solicitation efforts.

Designated Funds are established by individual or corporate donors who select one or more nonprofit beneficiaries at the time the fund is established. The fund will continue to support the agency unless it ceases to exist.

Legacy Funds are established with the intent that no gifts will come into the fund until after the donor’s lifetime. Gifts can be a bequest, trust, gift annuity, beneficiary clause or other planned gift. The fund may be Donor Advised, Designated or other type of fund. Donors can revise the Legacy fund agreement without changing their will or other estate plans.

Field of Interest Funds are designated by the donors to benefit specific areas of interest such as education or human services. Grants from these funds are awarded to local nonprofit agencies by the Community Foundation’s Community Fund Committees.

Scholarship Funds benefit students at colleges and universities throughout the United States. Specific criteria are established for each fund.

Unrestricted Funds are distributed to Larimer County nonprofit agencies and to local initiatives by the Community Foundation’s Community Fund Committees in Berthoud, Estes Valley, Fort Collins and Loveland.

For more information comparing a Donor Advised fund with a private foundation, visit the Donors section of www.CommunityFoundationNC.org and click on Private Foundation Options in the right-hand column.

To donate to any of the charitable funds at the Community Foundation, click on Donors > Donate to an Existing Fund. Or mail your check payable to the Community Foundation of Northern Colorado, 4745 Wheaton Dr., Suite 100, Fort Collins, CO 80525. Please write the fund name in the memo line.



BOARD OF TRUSTEES

JULY 1, 2009 – JUNE 30, 2010



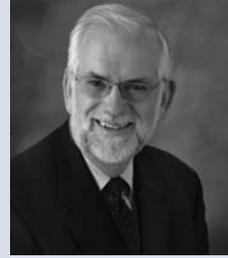
LUANN BALL
Loveland



RANDY DAVIS
Estes Park



CONSTANCE DOHN
Fort Collins



PHIL FARLEY
Loveland



BRUCE HACH
Fort Collins
Secretary/Treasurer



KRISHNA MURTHY
Fort Collins



WYNNE ODELL
Fort Collins
Chair



CHRIS OSBORN
Fort Collins



SPIRO PALMER
Fort Collins



TOM PATTERSON
Berthoud



ERIC PETERSON
Fort Collins



TROY PETERSON
Loveland



JOHN ROBERTS
Fort Collins



MARK SOUKUP
Fort Collins



JEAN SUTHERLAND
Fort Collins

Special thanks to outgoing FY 2008-2009 Trustees:

Dave Edwards and Yolanda Penley

The Community Foundation is governed by a Board of Trustees consisting of well-known community leaders from throughout Larimer County. Trustees are selected for having demonstrated a personal involvement in civic affairs and a high level of commitment and philanthropic leadership in our community.

This group is responsible to the community for the overall management and growth of the Foundation, including its fiscal and investment policies. The Community Foundation is also supported by the Regional Development Council and numerous committees.

REGIONAL DEVELOPMENT COUNCIL



DARIN ATTEBERRY
Fort Collins



ROGER BATES
Loveland



MIKE BURNS
Fort Collins,
Johnstown



NICK CHRISTENSEN
Loveland
Co-chair



MIKE DELLENBACH
Fort Collins



DOUG DUMLER
Fort Collins



DAVE EDWARDS
Fort Collins



BRAD FLORIN
Fort Collins



BRUCE HACH
Fort Collins



STEVE HAGBERG
Berthoud



BRUCE HENDEE
Fort Collins



DOUG JOHNSON
Fort Collins



LISA LARSEN
Fort Collins



JAN LORD
Berthoud



TERESA MUELLER
Loveland

Not pictured:

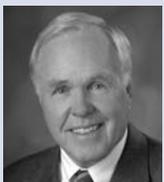
Robert Bisetti
Bill Gunn
Sheldon "Shelly" Sager



CHRIS OTTO
Fort Collins



PETER SCOTT
Loveland



JIM SPROUT
Fort Collins
Co-chair



STEVE VAN DEN HEEVER
Fort Collins

Members of the Community Foundation's Regional Development Council serve as ambassadors for the Foundation and as active proponents of its mission.

The Regional Development Council focuses solely on achieving the Foundation's strategic goals by growing its assets through fund development activities. It is not a fundraising committee. It cultivates new donors by identifying individuals who can benefit from the Foundation's philanthropic services and communicating with them in a strategic manner.

Members participate in semi-annual meetings to gain an understanding of the Foundation's services. They also provide leadership and financial support for its signature event, the Annual Celebration of Philanthropy.

COMMITTEES

JULY 1, 2009 – JUNE 30, 2010

Community Fund Committees in Berthoud, Estes Valley, Fort Collins and Loveland are responsible for grantmaking from unrestricted funds established in their respective communities. Civic leaders volunteer to serve on these committees to guide specific areas of the Foundation's work.

BERTHOUD COMMUNITY FUND COMMITTEE

Barbara Boyd, Chair
Kathy Burcham
Bruce "Doc" Fickel*
Craig Greenslit
Marjorie Knievel*
Jan Lord
Dale Louis
Misha Maggi
Sherrie Merrow
Tom Patterson
Everdina "Diny" Pickert
Carey Salomonson
* Honorary Members

ESTES VALLEY COMMUNITY FUND COMMITTEE

Joe Adair
Randy Davis, Chair
Ludie Dickeson, Secretary/Treasurer*
Barbara Marshall
Paul Newendorp
Judy Nystrom
Frank Shavlik, Vice Chair
Eric Waples
* Honorary Member

FORT COLLINS COMMUNITY FUND COMMITTEE

Donna Chapel
Lisa Clay, Chair
Chris Otto
Suzanne Pullen
Peggy Reeves

LOVELAND COMMUNITY FUND COMMITTEE

Lu Ball
Roger Bates
Scott Bray
Roger Clark
Cindy Corbett
Phil Farley
Mary Gullikson
Norma Hammond*
Paul Mueller
Joe Scherger, Vice Chair
Earl Sethre, Chair
Mike Wagner
* Honorary Member

AUDIT COMMITTEE

Sandy Boatman
Constance Dohn, Chair
Ellen Freudenberg

EXECUTIVE COMMITTEE

Constance Dohn, Secretary/Treasurer
Bruce Hach, Vice Chair
Wynne Odell, Chair
Chris Osborn, At-Large Member

INVESTMENT COMMITTEE

Denise Bretting, JD
Jason Burkett, CRPC
Bruce Hach
Morrison Heth, JD
Rick Johnson, Ph.D., Chair
Bill Locklear
Eric Peterson, JD

EXECUTIVE COMMITTEE

JULY 1, 2009 – JUNE 30, 2010

■ WYNNE ODELL, CHAIR

Wynne leads the Board of Trustees in creating the vision for the Foundation and ensuring the Board fulfills its fiduciary and governance responsibilities. She is CEO of Odell Brewing Company and holds an MBA from the University of Washington. She started volunteering with the Foundation in 2000.

■ BRUCE HACH, VICE CHAIR

Bruce transitioned from managing director of Hach Scientific Foundation to community volunteer in 2009 and has been a Trustee since 2003. He holds a bachelor's degree in history from Drake University and is a former member of the Loveland Community Fund Committee. He and his wife, Muriel, established the Bruce and Muriel Hach Family Fund in 2005, and a scholarship fund in 2006.

■ CONSTANCE DOHN, SECRETARY / TREASURER

Connie is a certified public accountant and chief financial officer for Dohn Construction. She holds a bachelor's degree in Business Administration and has 25 years experience in the accounting and auditing field. She and her husband, Doug, established the Dohn Family Fund in 2005. She has been a Trustee since 2008.

■ CHRIS OSBORN, AT-LARGE MEMBER

Chris Osborn is chairman of First National Bank. Raised in Northern Colorado, Chris graduated from UC Berkeley and is active in a number of community boards including the Poudre Valley Health System, Colorado Bankers Association, NoCo 20/30 and Beet Street. Chris has served as a Trustee since 2004.

What Will Your Legacy Be?

What are the values, experiences and life lessons you would like to share with future generations?

Give back to your community and loved ones by designating a gift or portion of your estate to the Community Foundation. Gifts may be made through an estate plan, an IRA or retirement plan, a Legacy fund (see page 13), life insurance policy, remainder trust, gift annuity or written into a will. Planned gifts such as a charitable gift annuity or charitable remainder trust provide immediate tax benefits and lifetime income payments to you or another named beneficiary.

The Community Foundation’s Legacy Society recognizes individuals who have made plans to leave such a gift. On behalf of future generations, the Community Foundation thanks the following forward-thinking people for their generosity:

- | | | | |
|---|------------------------------|--------------------------|-------------------------------|
| John Beach | Mary and David Gullikson | Jan and Donald Jorgensen | Rodney and Sharon Parks |
| Bill and Ruth Brown | Cindy Haraway | Larry and Pat Kendall | Jack and June Richardson |
| Ginny De Herdt and Rick Robertson | Jack and Shirley Haselbush | Mark C. Korb | Richard and Marlene Schilling |
| Carole Egger | Allen B. and Judy M. Herder | Gene Markley | Howard and Kathryn Schwartz |
| R.B. “Doc” Fickel | Kitty Hook | Joannah L. Merriman | MaryLou Smith |
| Gene E. Fischer and Marylynn A. Fischer | John and Carolyn Huisjen | Paul and Donna Newendorp | Steve and Susan Stoltz |
| Rita Gergen | Ken and Nancy John | Ardeth G. Nieman | William and Diane Warren |
| Mark Goldrich and Prudence M. Kaley | Dr. Robert and Ginny Johnson | Donald K. Park II | |

“Establishing a Legacy fund was a way for me to keep giving beyond the end of my life. As a long-time community activist, the decision has proven very rewarding and something I value highly.”

— ARDETH G. NIEMAN,
LEGACY SOCIETY MEMBER

To learn more about making a planned gift, call Ray Caraway at (970) 488-1980, or visit [www CommunityFoundationNC.org](http://www.CommunityFoundationNC.org) and click on Donors > Legacy Society.

IN MEMORY

This Annual Report is dedicated to the memory of the following donors:

LOUISE LEIGH ALLEN (1912 – 2008)

The Community Foundation’s Loveland/Boettcher Community Fund received an unrestricted gift via Ms. Allen’s will.

CAROL WICKES ECKBERG (1927 – 2008)

The Community Foundation’s Initiatives Fund received an unrestricted gift via Ms. Eckberg’s IRA.

JOHN HOLMBOE (1927 – 2009)

Helmberger-Holmboe Fund

**DOYLE JONES (1905 – 2005) AND
LUVESTA JONES (1904 – 2006)**

Doyle and Luvesta Frances Jones Fund



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DONOR SPOTLIGHT ARTICLES: KATHERINE MARTINEZ