

Fall Events Review

...continued from front.

LCF Poker Run

The second Annual Poker Run was a fun-filled day of wine tasting and community support. The event, held on September 11, 2010, offered participants the opportunity to hit the open road and sample some of Lodi's award winning wines, all while supporting the Lodi Community Foundation. We would like to thank the 2010 event sponsors: *Platinum Home Mortgage* and *Drummond & Associates*. A big thank you is also owed to the participating wineries: *Harmony Wynelands*, *Harney Lane*, *Jessie's Grove*, *St. George*, and *Van Ruitten*.



Board members Marilyn Storey and Colleen Stewart enjoy wine at Jessie's Grove.

Lodi Community Foundation Board of Directors

John K. Ledbetter, Chairman
Mary Ann Maggio, Secretary/Treasurer

Board Members
Bob Anderson

Nanette Green
Tony Goehring
Ron Heidinger
Nancy Martinez
Colleen Stewart
Marilyn Storey

Honorary Board Members
Carol Meehleis
Annette Murdaca

Lodi Community Foundation Funds: All Veteran's Plaza • Children's Endowment Share-Homes • Hospice of San Joaquin • Joe and Susan Maley Fund • Lodi Community Concert Association Endowment Fund • Lodi Community Foundation Fund • Lodi Public Library Endowment & The Lodi Public Library Building Fund • Pregnancy Resource Center of Lodi • Salvation Army Culinary Arts Program • Save the Grape Bowl Fund • Tree Lodi • Sunshine Trail Endowment • Women's Center of San Joaquin—Phoebe Watt Endowment •



P. O. Box 2278
Lodi, CA 95241-2278

www.LodiCommunityFoundation.org

A project of the Sacramento Region Community Foundation • www.sacregcf.org

NEWS & NOTES

Lodi Community Foundation

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LCF Receives Record Donation of \$125,000

Lodi Community Foundation is thrilled to be the recipient of a \$125,000 donation from the Joe and Susan Maley Fund of the Lodi Community Foundation. This very generous gift from Joe and Susan Maley will undoubtedly make a significant impact on those in need in Lodi.

The Maleys, who are longtime residents of Lodi, are a shining example of how to give back to the community. Their leadership will directly impact 11 different organizations in the Lodi Community including: *Boys & Girls Clubs*, *Hutchins Street Square Foundation*, *Lodi Arts Commission* (educational classes and scholarships), *Lodi Adopt-a-Child*, *Lodi Salvation Army*



The Lodi Community Foundation Board receives a \$125,000 check from the Joe and Susan Maley Fund of the LCF.

Culinary Arts Program, Lodi Family Resource Center, Lodi Track Fund, San Joaquin Hospice Endowment, San Joaquin Historical Society, and Stockton Children's Homes.

2010 FALL EVENTS review

Professional Education Day

The LCF held its annual Professional Education Day on Wednesday, November 17, 2010 at Hutchins Street Square. This event exists to support the continuing education of CPA's, financial planners, attorneys and insurance agents in Lodi. The Foundation was pleased to present Stephanie Curry of Pacific Life, who spoke to the issue of "Gifting as a Tax Strategy."

The forum was well received by the professionals in attendance. The Lodi Community Foundation would like to thank our generous sponsors for their support in making our Professional Education Day a success.

A special thanks to the following sponsors: *Drummond & Associates*, *Jim Demera*, *Lodi Chamber of Commerce*,

Platinum Home Mortgage, *Vino Farms* and *Vision Printing*.

Second Annual Stakeholder's Day

Our Stakeholder's Day is an excellent opportunity for the LCF board to maintain contact with our member non-profits. On February 10, 2011, the Foundation invited its member non-profits to Hutchins Street Square for an afternoon of dialogue.

This unique event featured philanthropy consultant Lynn Upchurch, who spoke to the attendees about "How to Build Relationships with Donors." This relationship building effort speaks directly to the mission of the Lodi Community Foundation—Uniting to build a sustainable community!



John Ledbetter, Chairman of LCF and Dan Williams of the Salvation Army Culinary Program.

Upchurch's vast knowledge of the non-profit world was truly an educational experience and LCF thanks her for engaging our audience.

...continued on back.

2010 Donors

The Lodi Community Foundation gratefully acknowledges our donors for the 2010, in accomplishing their philanthropic goal to support the community more efficiently, effectively, and in a sustainable manner.

All Veteran's Plaza Fund

Dr. & Mrs. Wilson Heefner
Ms. Sylvia S. Hertz
Ms. Mary R. Jensen
Mr. & Mrs. William H. Lynch
Mr. Steve Mann
Mr. & Mrs. Phillip H. Muller
Mr. Mario Petroni

Children's Endowment Share Homes

Cherokee Memorial Park

Hospice of San Joaquin

Joe & Susan Maley

Joe & Susan Maley Fund of the LCF

Joe & Susan Maley

Lodi Community Concert Association

Mr. Darrell Drummond
Ms. Corinne Terry
Jack & Clay Barber Shop
Retractable Screens of Lodi

Lodi Community Foundation General Fund

Mr. Darrell Drummond

Lodi Public Library Endowment

Mr. Darrell Drummond
Ms. Sheila Wishek

Pregnancy Resource Center

Mr. Darrell Drummond
Mr. & Mrs. Clay Saylor
Mr. & Mrs. Bruce Schweigerdt

Salvation Army Culinary Arts Program

Mr. & Mrs. Clay Saylor
Ms. Sheila Wishek

Save the Lodi Grape Bowl

Mr. Stewart C. Adams
Mr. & Mrs. Steve Borra
Mr. Jack Fiori
Mr. & Mrs. Glenn Handel
Mr. & Mrs. Ted Heinrich
Ms. Jeanne Kay
Mr. Bruce A. Mettler
Lodi Italian Club, Inc.

Every effort has been made to ensure this list is accurate. If your name is misspelled or omitted, please accept our apologies and contact us at 209.366.1222 to update your information.

How can you give?

Each individual, family, or organization we work with has unique charitable interests ... and unique financial circumstances. We help you make the most of both, so you receive the greatest return on your community investment.

You can make an **Outright Gift** of cash, stocks, bonds, real estate, or other assets to your community foundation. Your charitable gift qualifies for tax advantage under federal law.

Another option is to designate a gift or portion of your estate to your community foundation and, in some cases, receive a substantial reduction in federal gift and estate taxes by making a **Bequest by Will**.

Make a gift of cash or property to your community foundation through a **Charitable Gift Annuity**. You get immediate tax benefits, and ensure that you or a loved one receive fixed quarterly or annual income payments for life.

You can place cash or property in a **Charitable Remainder Trust** that pays annual income to you (or another named beneficiary) for life. After your death, the remainder of the trust transfers to your community foundation and is placed into a charitable fund you selected. You receive income tax benefits the year you establish your trust.

You can also place cash or property into a **Charitable Lead Trust** that pays a fixed amount to your community foundation for the number of years you select. Once this period ends, the assets held by the trust are transferred to the beneficiaries you name. In some cases, you receive a substantial reduction in federal gift and estate taxes.

Ways to Support an LCF Fund

There are multiple ways in which your gift can support the fund of your choice.

Scholarships Invest your gift in our community's future and show students you care. You determine the criteria students must meet to receive the scholarship you establish.

Unrestricted Funds Your gift can address ever-changing community needs, including future needs that often cannot be anticipated at the time your gift is made. The flexibility of an unrestricted gift enables the foundation's experts to respond to the community's most pressing needs, today and tomorrow.

Donor Advised Funds Have ongoing involvement in the use of your gift. Work with our program staff to identify ways to use dollars from the Donor Advised Fund you establish to address the issues and needs you care about most.

Field of Interest Funds Target your gift to address needs in an important area of community life: arts, AIDS, aging, at-risk youth. Identify your personal interest area when making your gift; our board awards grants to community organizations and programs that are making a difference in this area.

The key to having a rewarding giving experience is finding the best fit-for your charitable priorities, financial goals, and personal preferences.

Designated Funds Help provide ongoing funding for a senior center, museum, or virtually any nonprofit charitable organization. Nonprofit organizations can use a Designated Fund through the community foundation to build their endowment and enhance their ability to accept large and complex gifts.

Supporting Organizations You can use your gift to establish an excellent alternative to a private foundation, with only a fraction

of the administrative responsibilities. Help select board members, maintain personal involvement, and support the causes and organizations you care about, while enjoying the favorable tax treatment of a public charity. Leave investment management, start-up costs, grant administration, and reporting to your community foundation.

"Never doubt that a small group of thoughtful committed citizens can change the world: Indeed it's the only thing that ever has."

-Margaret Mead

To make a contribution to the **Lodi Community Foundation**, please complete the following:

Name: _____ Phone Number: _____

Address: _____ City: _____ State: _____

Email Address: _____

Yes, I would like to make a donation to:

LCF General Fund (for future Lodi projects). Make check payable to LCF-General Fund

I have chosen one of the **specific funds** listed. Make check payable to LCF- _____ (fund name)

I have included LCF in my will and/or trust.

Return this form to: Lodi Community Foundation • P. O. Box 2278 • Lodi, CA 95241-2278

For more information or to donate online, please visit us at LodiCommunityFoundation.org. You can make a secure donation by clicking on the **Give Now** link. Questions? Email us at LodiCF@gmail.com.

EVENTS
2011

FALL 2011 PROFESSIONAL PHILANTHROPY FORUM

Sponsored by the LCF in conjunction with the FPA, Estate Planning Council, The National Association of Insurance & Financial Advisors, and the Community Foundation of San Joaquin. Have questions or want more information about upcoming events? Call 209.366.1222.