

## Record-breaking Generosity by 30+ Donors Brings \$4.2 Million in Gifts

More than 30 donors contributed a record \$4.2 million in year-end gifts to the Southwest Florida Community Foundation and its affiliates in Bonita Springs and Sanibel-Captiva.

The amount was the largest in the 30-year history of the Community Foundation and increased its total assets to \$54.2 million.

"We were astounded at this outpouring of generosity to benefit our fellow citizens," said Foundation Chair Chris Gair.

The gifts were made to new funds and to existing funds at the Community Foundation. The proceeds of the funds benefit the Community Foundation's annual grants for non-profit activities in Lee, Charlotte, Hendry, Glades and Collier counties.

According to Foundation President Paul Flynn, the gifts included one of more than \$1 million, two of more than \$500,000, and two in excess of \$100,000.

Flynn said there was no pattern to the 2006 year-end gifts. He said some came from new donors, others from current donors who added to existing funds at the Foundation. Three bequests were also received.

The eleven new funds will benefit a variety of charitable endeavors, and includes several new scholarship funds for area high school seniors.

For information about how to create a fund at the Community Foundation, contact Dr. Julia East or Paul Flynn at 239-274-5900.

## Transition of Community Foundation CEO Continues



*Paul Flynn and Julia East*

The Southwest Florida Community Foundation will transition to its third chief executive officer June 1.

Dr. Julia East will succeed Paul Flynn, who is retiring on the 10th anniversary of the day he started as the Community Foundation's first full time CEO.

Julia has served as vice president of the Community Foundation.

"Our donors and our charitable partners will hardly notice the transition," Flynn said. "Julia has been at the Foundation for more than two years and knows the basic operation very well.

"In addition, we have been gradually transferring management of Community Foundation activities to her since the Trustees selected her last fall."

Flynn came to the Community Foundation in

1997. He succeeded Alan Robertson, the retired college president who worked part-time as the Community Foundation's first CEO.

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## LEADERSHIP:

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*Vice Chairman*

Joseph Catti,  
*Secretary-Treasurer*

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## Melvin Morgan Resigns as Vice Chair



*Melvin Morgan*

Mrs. Melvin Morgan has resigned as the vice chairman of the Southwest Florida Community Foundation.

She will remain as a Trustee of the Foundation.

Melvin, a former Lee County Commissioner and a prominent educator, travels extensively in her role as an officer in various capacities in the African Methodist Episcopal

Church. She indicated that her travel schedule precludes attendance at many meetings required of the vice chair.

"Melvin has been a long time Trustee and a distinguished pioneer in Lee County," said Foundation President Paul B. Flynn. "She is one of my heroes and I'm delighted she will continue to share her expertise as a Trustee."

## New Community Foundation Officers Named

Mrs. Donna Kaye has been elected vice chairman by the Trustees of the Foundation in January to succeed Mrs. Melvin Morgan, who resigned because of a busy travel schedule.

A native of New York, Donna has lived in Fort Myers since 1979.

She has been treasurer of the Nature Center, and a board member of Edison Community College Foundation, the Imaginarium, the

Community Concerts Association, and president of Capital Investors.

Joseph Catti, president of Finemark National Bank and Trust Company, has been elected secretary-treasurer of the Foundation, succeeding Kaye.

Joe, a Miami native, has lived in Lee County since 1992. He was named Lee County Philanthropist of the Year in 2005.

He is chairman of the

Florida Gulf Coast University Foundation, immediate past chair of the Lee Memorial Health System Foundation, and has been on the boards of Hope Hospice, the Salvation Army, United Way, Edison-Ford Winter Estates, and the Foundation for Lee County Public Schools.

## Foundation Celebrates 30th Anniversary Through Events, New Initiatives

Beginning with the Annual Meeting in November, the Southwest Florida Community Foundation is celebrating 30 years of helping to build a stronger community.

The celebration will continue throughout this year.

A special premiere viewing of the new movie *The Ultimate Gift* was one way

in which the Foundation has celebrated.

The *Ultimate Gift* delivers a powerful message of the importance of philanthropy both through the book and the movie.

A women's giving program is also being launched this year allowing women of our community an

opportunity to make a greater impact with their philanthropic giving.

Anyone interested in these special programs or would like to learn more about where the Community Foundation is headed for the next 30 years, please call the Foundation office at 239-274-5900.

# New Funds of the Southwest Florida Community Foundation

## Wilfred & Edith Berman Fund

When Bill and Edith Berman established their charitable gift annuity with the Southwest Florida Community Foundation in 2002, they had two objectives.

The first was to ensure a steady income stream from the annuity throughout their lives.

Their second objective was to perpetually support various nonprofits that were close to their hearts.

Edith passed away in 2005 sixth months short of their 50th wedding anniversary. Bill died last November at age 95.

"Bill Berman was very specific about his wishes for the endowed portion of his annuity," said Paul Flynn, Foundation president. "He was a very bright man who used his talents to help others well into his 90s."

The six nonprofits which will benefit from the Berman's perpetual philanthropy are: Quality Life Center, Temple Beth El, Communities Reaching Out, End-of-Life Choices of Florida, All Faiths Unitarian Congregation, and the Unitarian Universalist Church of Fort Myers.

The Bermans also directed immediate gifts to Big Brothers Big Sisters and Hope Hospice.

The Bermans moved to Fort Myers from Pittsburgh in 1984. Bill was involved in nonprofits that helped at-risk children. He was a director of Big Brothers Big Sisters, the Quality Life Center, and committees of the Juvenile Justice Council. Edith's activities included the arts, oil painting, and couture-quality clothing and hat design.

## Joyce Lee Eudy Charitable Fund

The estate of a Fort Myers Beach woman has made a gift to the Community Foundation.

Joyce L. Eudy, 67, who died last year, directed that the Joyce Lee Eudy Charitable Fund be created with her bequest.

The fund will benefit children and families in Southwest Florida affected by autism and other developmental disorders, according to a letter of direction to Foundation Trustees in September 2005.

Her husband, Milton H. Eudy, died in 2005. She is survived by two sons, a daughter, seven grandchildren and four great-grandchildren.

## John E. Presser Fund

Thanks to the kindness of a Cape Coral man, Shriners Hospital for Children - Tampa received its first of many checks in January.

When John Edwin Presser was active as a member of the Cape Coral Shrine Club, he became a major supporter of the Shriners Hospital for Children - Tampa.

He created a Charitable Remainder Trust to benefit his brother during the brother's lifetime. When John's broth-

er died last spring, the remainder of John Presser's Trust came to the Southwest Florida Community Foundation.

His trust document directed the Community Foundation to establish the John E. Presser Fund, invest the gift, and send the proceeds annually to the hospital to help children in need.

Mr. Presser retired to Cape Coral in 1975 after a 42-year career with Proctor & Gamble. In addition to the Shrine Club, he was a member of the Fort Myers Masonic Club, a life member of Cape Coral VFW, and a member of the Cape Coral Elks.

## Judge William J. Nelson Scholarship

Bill Nelson's friends never thought of him as handicapped. But he was.

A new scholarship recognizing a student who has overcome adversity will honor Judge William J. Nelson, a Circuit Court Judge who died suddenly of a heart attack in 2003. The applicant must plan to attend the University of Florida.

When Judge Nelson was 5, he lost his right hand in an accident. His disability never held him back. He played football, attended the University of Florida and Stetson Law School.

He was named a judge of the 20th District Circuit Court in 1981. The Circuit includes Lee, Charlotte, Hendry, Glades and Collier counties.

In a story reporting his death, The News-Press quoted him as saying: "A person is only handicapped if he is convinced he is...you can do anything you want to regardless of your physical capabilities."

The Judge William J. Nelson Scholarship will be awarded by the Foundation for the first time this spring.

*continued on page 6*

## Other New Funds Established at the Southwest Florida Community Foundation:

Charles & Margaret Foster Scholarship Fund  
The Verandah Fund -- Corporate Donor-advised  
George & Irene Hughes Fund -- Donor-advised  
Robert Kleckner Scholarship Fund  
Jan Eustis Children's Services Fund -- Corporate Donor-advised  
Vern & Meryl Eriksson Fund -- Unrestricted  
Ladonna & Hal Abelson Fund -- Designated  
Doc Keen Memorial Scholarship Fund  
Joan & Thomas Krick Fund -- Unrestricted  
Casper Family Charitable Foundation -- Donor-advised  
SWFL Deputy Sheriff's Association Fund -- Scholarship  
Richard & Patricia Driscoll Fund -- Donor-advised  
Bob & Pam Martin Foundation Fund -- Donor-advised

**LEADERSHIP:**

**COMMUNITY FOUNDATION OF SANIBEL-CAPTIVA**

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*Chairman*

Liddy Johnson,  
*Vice Chairman*

Ann E. Arnoff,  
*Secretary*

Al Hanser,  
*Treasurer*

Virginia L. Fleming,  
*Immediate Past Chairman*

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Bob Berendt  
Steve Brown, M.D.  
M. William Frey  
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Timothy O'Neill  
Martin Packard  
Robbie Roepstorff  
John Schubert  
Daniel Valentine  
Robert Wigley

[www.sanibelcommunity.com](http://www.sanibelcommunity.com)

## Community Foundation Of Sanibel-Captiva Bailey Grants Awarded to Area Nonprofit Agencies

The Community Foundation of Sanibel-Captiva has awarded \$76,300 in grants to area nonprofit agencies providing services to the residents and workers of the islands community.

Agency	Grant	Program
Bailey-Matthews Shell Museum	\$2,500	color laser printer
Brightest Horizons Mission, Inc.	\$5,000	matching funds with state for childcare
Children's Education Center of the Islands	\$6,000	pre-school scholarships
City of Sanibel	\$2,000	wheel chair for disabled persons for beach
City of Sanibel	\$5,000	scholarships for After -School program
Community Housing & Resources, Inc.	\$4,000	credit counseling program
CROW	\$2,000	freezer
FISH of Sanibel	\$7,000	health equipment for those in need
Gulfshore Ballet	\$4,000	performance of The Nutcracker
Junior Achievement of SWFL, Inc.	\$5,000	Classes for 120 students at Sanibel School
Sanibel Community Association	\$10,000	Repairs to facility
Sanibel Music Festival	\$2,000	classical music concert for Sanibel School students
Sanibel School PTA	\$2,500	equipment for television production studio
Schoolhouse Theater Foundation	\$5,000	Supplies for Young People in Dramatic Arts program
SWFL Symphony	\$3,000	music programs for Sanibel students
Bailey Good Neighbor Fund	\$11,300	emergency fund for S-C residents & workers
<b>TOTAL</b>	<b>\$76,300</b>	

## Annual Sanctuary Golf Tournament Supports Foundation

The Community Foundation of Sanibel-Captiva was the recipient of the fundraising efforts of the annual Sanctuary Community Golf Challenge.

This year, the proceeds totaling more than \$80,000 will be used to support the PURRE water coalition.

PURRE water coalition was organized in December of 2005 following massive releases of polluted fresh water from Lake Okeechobee. The organization has been instrumental in raising awareness and educating the public to the growing

problems facing the waterways.

The Sanctuary Golf Club hosts this special fundraising event each year.

# Bonita Springs Community Foundation

## Donna Roberts Honored with Love of Bonita Award



*Bill Davis presents the Love of Bonita award to Donna.*

The Bonita Springs Community Foundation honored Donna Roberts for her ongoing passion, leadership and commitment to the Bonita Springs community at the 2007 Love of Bonita gala.

The Community Foundation

gave Donna \$10,000 to award to the charity of her choice. She announced at the gala that Joanne's House will be awarded the grant.

Donna, a passionate supporter of Hospice, used her talents as a leader to create the motivation

and commitment to bring Hospice care to the residents of Bonita Springs.

Because of Donna's dedication, the group she started in her home is now called the Women's Committee and is 300 members strong.

"Individuals like Donna are the very reason we started the Love of Bonita award," said Bill Davis, Chair of the Bonita Springs Community Foundation. "We want to honor the individuals who have made our community a better place and encourage others to do the same."

This is the sixth annual Love of Bonita award. Past recipients are David Short, Ira Hawk, the late Pat Lord, Dick Miller and Jacke McCurdy.

### LEADERSHIP:

#### BONITA SPRINGS COMMUNITY FOUNDATION

William B. Davis,  
*Chairman*

Frances Luessenhop  
*Vice Chairman*

David Shellenbarger,  
*Secretary*

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Joseph Ambrozy  
David P. Browne  
Kay K. Chitty  
Frederick J. Costello  
Cherrill Cregar

Jon Davis  
Melanie Dehon  
Ed Houck

Patricia Johnson  
Diane Lepola  
Arden McCurdy  
Dick Miller

Nancy A. Near  
Harlan C. Parrish  
Darren Robertshaw  
Marie Tranovich  
John Warfield  
Joel Whittenhall

[www.bonitacommfoundation.com](http://www.bonitacommfoundation.com)

## Foundation Releases Needs Assessment Report

The Bonita Springs Community Foundation recently released a needs assessment report of the South Lee County area to better understand their unique community.

During a strategic planning session last year, the Foundation created a needs assessment committee to analyze the community's needs as a new and rapidly growing area.

The report is the culmination of months of pulling together statistical data from governmental agencies and anecdotal information from nonprofit agencies and government serving South Lee County.

"The areas of need we are seeing through this report should be addressed now before the problems become even bigger," said Dave Shellenbarger, chair of the needs assessment committee.

"That is why we want to share our findings with the community and start discussions of how best to address these needs now and in the future."

"We started this process so that we could use our grant funding for the greatest impact on our community and help potential donors identify the needs that match their own philanthropic goals,"

said Foundation Chair Bill Davis.

"Obviously, the information is constantly changing and will need to be reassessed from time to time. We see that as part of the Foundation's role and a service to provide to the community."

This report is made available to agencies serving the community as well as service organizations and government entities. Anyone interested in an electronic copy of the report or having a presentation made to their organization can contact Foundation staff member Kim Donahoe at 274-5900.

## New Funds

**Spanish Wells Golf & Country Club Fund** — Corporate Donor-advised Fund

**Jeremiah W. & Barbara Sullivan Fund** — Donor-advised fund established to support the philanthropic interests of the Sullivan family.

# THE FOUNDATION

## Community Foundation News

### Community Foundation Awards Founders Society Grants

The Southwest Florida Community Foundation awarded more than \$106,000 to area nonprofit agencies through its Founders Society Grants.

Founders Society Awards	Grant
Agape Home, Inc.	\$5,000
Alliance for the Arts	\$5,000
Bernice A. Russell Community Development Corp.	\$1,000
Boys & Girls Clubs of Lee County	\$3,500
Brightest Horizons Mission, Inc.	\$4,800
Caloosahatchee River Citizens Assoc./Riverwatch	\$1,000
Cape Coral Community Theater, Inc.	\$5,000
Children's Home Society	\$4,000
Colours School of the Arts of SWFL, Inc.	\$4,000
Community Christian School of SWFL, Inc.	\$5,000
Dr. Piper Center for Social Services, Inc.	\$5,000
Eckerd Youth Alternatives, Inc.	\$5,000
Edison-Ford Winter Estates Foundation, Inc.	\$4,500

This annual grant cycle is funded exclusively through membership dollars generated by the Founders Society.

Founders Society Awards (cont.)	Grant
Foundation for Lee County Public Schools, Inc.	\$5,000
Humane Society of Lee County	\$5,000
Jewish Federation of Lee & Charlotte Counties	\$3,750
Literacy Council of Bonita Springs	\$5,000
Music Foundation of SWFL	\$3,800
NAMI of Collier County	\$2,995
St. Vincent de Paul Thrift Store	\$5,000
SWFL Council Boy Scouts of America	\$5,000
SWFL Symphony	\$5,000
Uncommon Friends Foundation	\$4,950
YMCA of Lee County	\$5,000
Young Artists Awards, Inc.	\$3,500

### New Funds of the Foundation *(continued from page 3)*

#### Doc Keen Scholarship

When Dr. Kenneth Keen was alive, his service to the farmers in Glades and Hendry counties was extraordinary.

Veterinarian "Doc" Keen, as he was known, cared for both large and small animals from his office in Moore Haven.

He was also very active in helping young people with their interests in animal husbandry.

When he died in a tragic fire last year, friends made donations in his memory. His wife, Donna, established a

scholarship for the young people he worked with.

The scholarship will be awarded to a senior in Moore Haven, LaBelle, and Clewiston who has had a minimum of two years' membership in either Future Farmers of America or 4H. The recipient must be pursuing agricultural vocational training at a technical school or college.

Thanks to his friends, Doc Keen's memory has been endowed forever.

### Transition of Foundation CEO *(continued from page 1)*

In July 1997, the Foundation had one full time employee and two part-time staff members. The Community Foundation headquarters was a three-room, windowless office on West First Street.

Today the Community Foundation has nine full time and one part-time employees working in a 12-room facility in Fountain

Court, an office complex on College Parkway.

Community Foundation grants and scholarships totaled \$799,116 in 1997. In the fiscal year ending June 2006, Foundation giving was \$5,166,053.

Total assets were \$13.8 million in 1997, compared to more than \$54 million today. Funds under management have grown

from 70 to more than 300.

Will things change?

"Yes and no," says East. "Our Trustees have begun a long range strategic planning initiative in 2007, and we will be changing the way we invest our money, but overall, our service to charities and donors will remain outstanding."

"The Foundation's future is exciting," she said. "As

our assets grow to \$100 million, we will be able to do even more to improve the quality of life in Southwest Florida."

Aline and Paul Flynn plan to visit their four daughters and spend the summer in New Hampshire. Paul will return next winter as a consultant to "do whatever Julia needs me to do."

## TAX-WISE GIVING

# Congress Loosens “For a Limited Time Only” the Charitable Giving Rules Relating to Direct Gifts from IRAs

by John W. Sheppard

President Bush signed into law on August 17, 2006 the Pension Protection Act of 2006. Among other things it includes very limited provisions of the so called “Care Act” (relating to charitable gifts from IRA’s).

By the time you receive this, if you didn’t do anything in 2006 – you may have already lost one year. Please don’t let 2007 pass without action!

In this article, we will cover only those provisions relating to direct gifts from “IRA’s” and will cover other gift related provisions in a later article.

Here are some new applicable provisions:

1. Effective immediately, the owner of a traditional or Roth IRA (not SEP plans, 401k or 401(3)(b) or split gift plans like Gift Annuities) can make direct gifts from their IRA to a nonprofit organization. Significance? It is substantial benefit to two categories of folks – those who are tax non-itemizers and those whose charitable gifts may exceed the allowable annual tax deductions for charity. (Earlier law required that the person draw down the money and report the drawdown as ordinary income, then make the gift to charity).
2. This new law applies only for the tax years 2006 and 2007 (unless extended by the new Democratic Congress), and the limit of charitable gifts under the new law is any amount up to \$100,000 for each year. Therefore, while 2006 is past, if the owner wants to utilize the “2007 window,” it must be completed before the end of the 2007 calendar year.
3. Only those persons who are at least 70-1/2 at the time the contribution is made will qualify.
4. While gifts may be made to Field of Interest, Scholarship, Unrestricted and Designated Charitable Agency funds, they may not be made, under this law to Donor-advised funds. To learn the differences in these funds, call the Foundation office.
5. For those over 70-1/2, the direct gift will qualify as a part or all of the required minimum annual distribution from your IRA. Suppose then, you are 70-1/2, and are required to “draw down” \$40,000 per year from your plan but do not need the money. By making a direct gift to the Foundation from your IRA, you could save up to \$11,200 in taxes and the Foundation would receive the full amount (even though since it is a direct gift to the foundation you would receive no charitable deduction on your tax return).
6. The gift must go directly from the IRA to the qualified nonprofit – and not come out to the IRA owner, then to nonprofit (this is an important distinction) – and the nonprofit must provide acknowledgement to the Donor that it received the gift directly from the IRA plan administrator.
7. The IRA owner must receive ABSOLUTELY NO FINANCIAL BENEFIT from the gift – such as free accommodations, golf rounds, meals, shirts, etc – if he/she does, then the entire direct gift is disqualified.

The above bullets are the “nub” of the new law as relates to IRA’s, for now. So, if you are or will be 70-1/2 prior to December 31, 2007 and have questions, call the Foundation office (274-5900), or better still, your tax advisor for more detail on your specific situation.



*John W. Sheppard, a long-time member of the board of trustees of the Southwest Florida Community Foundation, is a retired estate planning attorney and author of several books on the subject of estate planning and planned giving. He can be reached through the Foundation office.*

FOCUS is published quarterly by the Southwest Florida Community Foundation and its affiliates, the Bonita Springs Community Foundation and the Community Foundation of Sanibel-Captiva.

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A copy of the official registration and financial information may be obtained from the Division of Consumer Services by calling 1-800-435-7352 within the State. Registration does not imply endorsement, approval, or recommendation by the State. Registration # CH661

#### MISSION:

Helping to meet the needs of people through responsible giving.

#### VISION:

We strive to be the leading resource in uniting donor's wishes with the changing needs of our community through compassionate, flexible, and perpetual giving.



SOUTHWEST FLORIDA  
**COMMUNITY  
FOUNDATION**

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## Save the Date

**Major Annual Grant Cycle  
Deadline**  
March 7, 2007

**Student Scholarship Dinner**  
June 4  
Broadway Palm Dinner Theatre

**Leadership Reception**  
March 8, 2007

**Scholarship Interviews**  
April 3, 4 and 6  
Community Foundation office

*Many events require an RSVP. Please check with the Foundation office if you have a question.*

## Helping Each Other

The Southwest Florida Community Foundation makes every effort to keep administration costs low. Please consider sponsoring one of our next issues of this newsletter by contacting the Foundation office at 239-274-5900.