

2016 Annual Impact Report

Impacting the Community for 29 Years



**WINONA
COMMUNITY
FOUNDATION**

One vision. Many paths.



Message from the Executive Director

It is my pleasure to unveil the 2016 Winona Community Foundation (WCF) Annual Report. Just as in years past, WCF continues to witness extraordinary spirit that is shared between fund advisors, committee members, board members, donors, and staff. The efforts put forth by this core group clearly contributed to the needs and growth of our community.

As you read through our report, it serves as a reminder of the donors in and around our community that have the desire to invest in the immediate and long-term needs that exist. My role, with your help, is to reach out to others and introduce them to how they can join the efforts in building a stronger tomorrow with the Foundation. Introducing the Foundation to others will show our ability to act as a catalyst serving both the donors and community.

Our mission is to promote philanthropy throughout our community, and with your assistance, we will continue to build and grow and achieve our mission. Winonan's are philanthropic and they are forward thinking, the result of our donors' generosity is: enhancing quality of life through many avenue's.

My call for action is; learn more about WCF and join us in our mission to improve our community. Please contact me for any assistance the foundation can provide.

Sincerely,
Jeni Arnold
Executive Director

Thank you for investing in the Winona Community Foundation's future.

Board Members

PAST BOARD MEMBERS *2016 Board Members in Bold and Pictured Right

Mike Allen

Diane Amundson*

Muriel Arnold

Chris Arnold

Bud Baechler

Rita Banicki

Mickey Barr

Eric Bartelson*

Bob Bartz

Mike Bernatz

Jane Biesanz

Ted Biesanz

Richard Blahnik

Andy Blomsness

Steve Blue

Sara Brandon

Adolph Bremer

Jan Brosnahan

Dave Bue

Tim Burchill

Sandra Burke

Judy Davis

Vicki Decker*

Bob Deter*

Brother Louis

DeThomasis

Randy Domeyer

Chuck Eddy

Laura Eddy

Susan Eddy*

Sue Edel

Karen Fawcett

Father Tom Finucan

Bill Flesch

Fred Fletcher*

Dan Florness

Jim Forsythe

Bob Gilbertson

Tom Graham

Joan Greshik*

Gary Hayes

Carol Heineman

Donna Helble

Dale Helmich

Andrea Herczeg

Margaret Johnson

Jerry Kellum

John Kennedy

Jennifer Knapp-

Severson

Pauline Knight

Mark Kristensen

Darrell Krueger

Ann Lavine*

Laurie Lucas

Kevin Mahoney

Gabe Manrique

Leone Matuszycki

Bill McNeil

Shelley Milek*

Tedd Morgan*

Floretta Murray

Gerald Neal

Rod Nelson

Bud Nystrom

Kelley Olson*

Carol Orlowski

Patti Peterson

Ryan Ping*

Bob Quinlan

Rodger Reitmaier

Jack Richter

Ralph Ruben

Pat Rukavina

Ken Seebold

Donna Seitz

Judy Shepard

Tom Siewert

Royal Thern

Todd Thompson

Dan Trainor III

Beau Van Beek*

Rene Walz

Gary Watts

Nancy Wiltgen*

Joyce Woodworth

Tom Wynn



Jeni Arnold
Executive Director



Diane Amundson



Eric Bartelson



Vicki Decker



Bob Deter



Susan Eddy



Fred Fletcher
Treasurer



Joan Greshik



Ann Lavine



Shelley Milek
Chair



Tedd Morgan



Kelley Olson
Vice Chair



Ryan Ping



Steve Smith
Finance Director



Beau Van Beek
Secretary



Nancy Wiltgen



Project FINE submitted a final report to the Winona Community Foundation, detailing the progress of the Safe & Healthy Families program. This program provided education, resources and ongoing support for refugee and immigrant families in Winona and St. Charles. The grant funds from the Winona Community Foundation supported workshops, individual assistance and referrals to partner agencies. Activities focus on domestic violence, child discipline, home environment and disaster preparedness.

These activities were very successful, meeting or exceeding all anticipated outcomes. 80 adults and 47 children participated in program activities; with an additional 27 receiving additional services through referrals to partner agencies; and all participating families created an emergency plan. On post-program evaluations, 100% of participants indicated that the program increased their understanding of the importance of health and safety; and 65 of 80 (81%) indicated that the skills they gained through the program improved their family relationships or home environment.

Vision & Mission

Inspired by the area's rich tradition of generosity, the Winona Community Foundation strengthens our community through philanthropy.

VISION STATEMENT

The Winona Community Foundation will foster a healthy, dynamic community where all people have the opportunity to enhance the quality of their lives and the lives of others.

MISSION STATEMENT

The Winona Community Foundation improves the quality of life in the Winona area by:

- Educating the public about the practice of philanthropy and its benefits both to donors and to the community
- Connecting people with charitable intent and resources with organizations and causes that can advance the public good
- Gathering, preserving and stewarding philanthropic resources
- Collaborating with other charitable organizations
- Serving as a catalyst for selected community initiatives
- Making grants to projects and causes that address both the needs and the opportunities present in the community

www.WinonaCF.org

Dear Friends of the Winona Community Foundation,

It has been my privilege to serve on the Winona Community Foundation Board of Directors for the past seven years. As President of the Board this past year, I have seen first-hand the amazing dedication and joint collaboration from a Board of Directors and staff who were committed to managing the Foundation's assets and carrying out its vision and mission.

Winona Community Foundation committees were engaged in work that supported the strategic plan of a growing organization. Service models were reviewed to ensure our investment services continue to improve efficiencies. New additions to the Winona Community Foundation Board of Directors continued to strengthen the organization due to its leadership. A marketing plan was created to provide better communication to a philanthropic community, and grant guidelines were revised to ensure organizations have greater opportunities to service the needs of our community.

I extend my thanks to outgoing Board members, Susan Eddy, Diane Amundson, and Tedd Morgan, for their service and dedication. Their knowledge, expertise and devotion have moved the Winona Community Foundation to enhance the quality of life in the Winona area. In addition, I am pleased to leave the Foundation Board of Directors in great hands with a new President of the Board, Kelley Olson. She is committed to ensuring that the mission and vision carry on.

Finally, on behalf of the Board of Directors, I extend a spirit of appreciation to our many supporters and donors who demonstrated a commitment to the care of our community through the great work of the Winona Community Foundation. Thank you for your generosity.

Sincerely,
Shelley L.M. Milek
2016 Chairperson, WCF Board



Financial Summary

Statement of Financial Position as of December 31:	2016	2015
ASSETS		
Cash and other current assets	8,381	893
Pledges receivable	-	14,617
Remainder trusts receivables	199,617	199,617
Investments	13,070,018	12,411,768
Other assets	2,473	6,392
Total assets	\$13,280,489	\$12,633,287
LIABILITIES		
Accounts payable and accrued liabilities	12,551	22,171
Grants Payable	360	5,601
Total liabilities	\$12,911	\$27,772
NET ASSETS		
General	1,040,858	1,040,858
Restricted or designated	12,226,720	11,564,657
Total net assets	\$13,267,578	\$12,605,515
Total liabilities and net assets	\$13,280,489	\$12,633,287

Support, Revenue & Expenditures as of December 31:	2016	2015
SUPPORT & REVENUE		
Contributions	1,429,644	1,384,365
Investment earnings (losses)	769,077	(164,738)
Other revenue	283,369	249,060
Total support and revenue	\$2,482,090	\$1,468,687
EXPENDITURES		
Community General Fund grants	32,328	23,012
Advised grants	1,228,224	791,795
Total grants	\$1,260,552	\$814,807
Operations and investment expense	559,475	675,167
Total expenditures	\$1,820,027	\$1,489,974
Excess of revenue (expenditures)	\$662,063	\$(21,287)
Net assets at beginning of year	\$12,605,515	\$12,626,802
Net assets at end of year	\$13,267,578	\$12,605,515



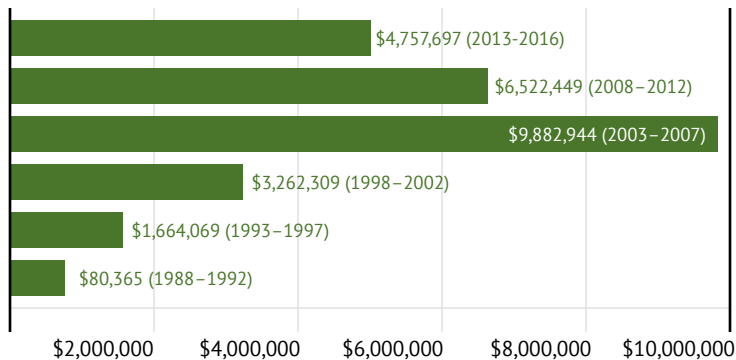
*The above limited financial information is un-audited.
Complete audited financial statements are available at the Foundation's office.

Historic Impact & Growth Chart

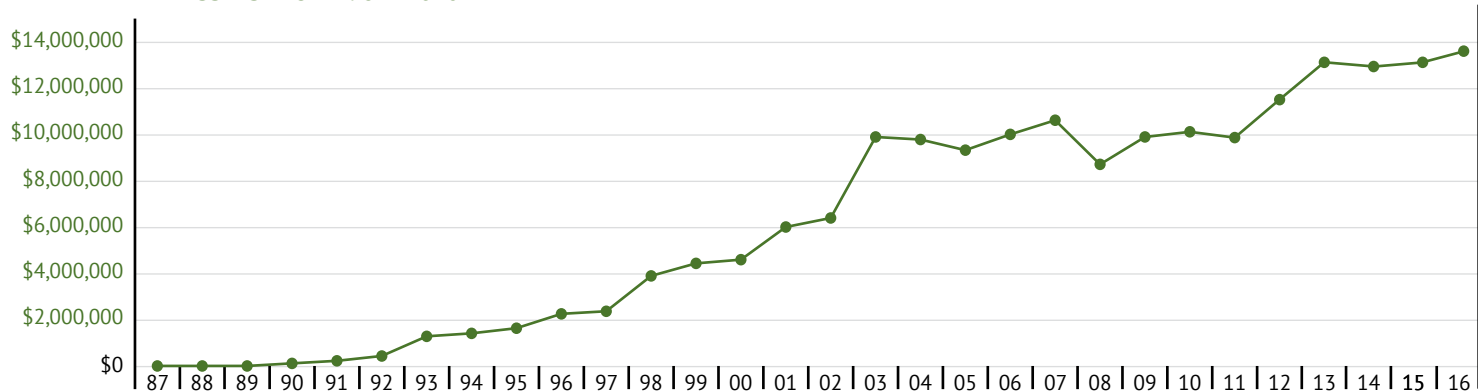
PUTTING IT ALL TOGETHER

As the Winona Community Foundation looks to the future, it works to manage overall assets wisely and professionally, while still maintaining sufficient resources to support a variety of community organizations. Working with the advisors, WCF maps out the future to ensure the growth of assets, as well as donor education about the value of using WCF as a vehicle for long-term community charitable goals.

ADVISED GRANTS FROM 1988 - 2016: \$26,169,833



NET ASSETS FROM 1987 - 2016



TOOLS FOR CHARITABLE GIFT PLANNING

Charitable Bequest - Creates a legacy provision in your will

Gift of Retirement Plans - Avoids potential double taxation

Gift of Life Insurance - Ensures a convenient and flexible way to give

Donor-Advised Fund - Provides maximum tax benefits and grant making flexibility

Charitable Gift Annuity - Provides lifetime income

Gift of Securities - Offers triple tax benefits

Charitable Remainder Trust - Increases income and bypasses capital gains taxes



One vision. Many paths.

Foundation Funds

DONOR-ADVISED FUNDS

Donors make charitable gifts into a named fund at the Winona Community Foundation. Over time, funding recommendations are made to the Foundation's Board for grants to qualified non-profit organizations.

Anonymous (6) Funds

Dave and Muriel Arnold Family Fund

Bartz Family Fund -

Ted and Patti Biesanz Family Fund

Steve and Ann Blue Fund

Brosnahan Family Fund *

Gerry Cichanowski Family Fund

Mike and Linda Cichanowski Family Fund

Dahl Automotive Fund

William and Judith Davis Fund

Mark Deter Memorial Fund

Chuck and Laura Eddy Family Fund

John and Susan Eddy Family Fund

Phil Feiten Family Fund

Robert and Erika Gilbertson Fund

Helen Leaf Haun Family Fund

Harland P and Pauline G Knight Family Fund

Jean Knutzen Fund

Dale E and Linda K Kukowski Fund

Langenau Legacy Fund

Leonard Lopez Memorial Fund

Mia Martin Fund

Elmer and Louis Mattila Family Fund

Thomas E and Leone J Mauszycki Fund

William and Joan McNeil Family Fund -

Jeremy and Janel Miller Family Fund

Mr. Morris Extra Chance Fund

Papenfuss Family Fund

JC and Arlene Pfeiffer Fund

REACH Fund

Dan and Pat Rukavina Family Fund

Stephen and Barbara Slaggie Family Fund

Charles R and Marie S Smith Family Fund

Thern Fund

Trainor Family Fund -

Dan and Shelley Trainor III Family Fund

John and Caer Vitek Family Fund

Winona Agency Fund

Peter and Joyce Woodworth Fund

Thomas and Barbara Wynn Fund

SCHOLARSHIP FUNDS

These Funds are established to provide support to an individual student's education beyond high school. From medicine to golf, scholarship donors may select their Fund's focus, all while supporting a student's dream of a better future. Grants are awarded based on an established set of criteria evaluated by independent committees.

Gomez Montessori Scholarship Fund

Bruce McNally Family Scholarship Fund

Morrie Miller Memorial Scholarship Fund

Jack Radar Scholarship Fund *

Rotary Ambassadorial Visitor Fund

Brianna Grace Vitek Scholarship Fund

DESIGNATED FUNDS

When making a donation to a designated Fund the donor advises the Foundation to pay available grant dollars to a specific named organization or project.

Clara Barton Red Cross Fund

Friends and Deborah Miller Kanaber Library Fund

Rotary International Service Fund

Winona Area Hospice Endowment Fund

Winona Area Track & Field Project Fund

SPECIAL PURPOSE FUNDS

These Funds support a separate charitable organization that associates itself with the Community Foundation and enjoys the favorable public charity status of the Foundation.

Beyond Tough Guise Fund ~
BK5K Youth Fund
Bluff Country Studio Art Tour Fund ~
Community Fund
Dive and Rescue of Winona Fund
Early Childhood Initiative Fund
Emergency Response Team Fund ~
Frozen River Film Festival Fund
Hiawatha Valley Marines Fund ~
High Wagon Bridge Restoration Fund
Homer Civic Association Fund
Maggy Jacqmin Performing Arts Fund *
Pete Kuklinski Jr. Golf Fund
Landon We-Noh-Na Fountain Fund
Live at the Levee Fund
Masonic Temple Restoration Fund
Nordic Ski Club of Winona Fund

Randy Schenkat Human Development Fund *
Steamboat Days of Winona Fund
Winona Area Toys for Kids Fund
Winona Park Development Fund
• Winona Park Development – Dog Park *
• Winona Park Development – East End Project
• Winona Park Development – Every Child's Dream
Winona Sister Cities Fund
World Fair Fund

FIELD OF INTEREST FUNDS

These Funds allow donors to target their gift to reflect a passion for a particular cause or area of interest. The Foundation makes grants from these Funds to support the most appropriate projects within that prescribed area of interest.

Connect People to Nature Fund
Dental Access Fund
Emergency Assistance Fund
Flatlander Speed Society Fund
Goodfellows Fund
Ready Set School Fund

AGENCY FUNDS

These Funds enable other non-profit organizations to establish their own long-term fund at the Foundation. The Foundation handles the investment and management of the assets, distributing the earnings back to these agencies for their general purposes.

Big Brother Big Sister Fund
Habitat for Humanity-Land Fund ~
Polish Cultural Institute & Museum Fund
Rushes Wilderness Foundation Fund
Margaret Simpson Home Fund dba Family & Children's Center
St Charles Area Hospice Endowment
United Way of Greater Winona Endowment Fund
Winona Community Foundation
• Jack and Sue Cornwell Memorial Fund
• Founders Fund
• Thomas H Laken Admin Endowment Fund
• Wilmer L and Beverly A Larson Fund
Winona County Developmental Achievement Fund
Winona Senior Friendship Center Fund
Winona Volunteer Services Fund

* fund was opened in 2016

^ seed fund opened in 2016

~ fund was closed in 2016

The funds represented in this report reflect only those who have authorized the Foundation to publish the name of their fund and excludes the funds who have requested to remain anonymous

These funds may be endowed or pass-through.

- An ENDOWED FUND is one in which the principal is kept intact and only a certain amount of the earnings are available each year for granting purposes. Donors may require that the principal remain intact in perpetuity, for a defined period of time, or until sufficient assets have been accumulated to achieve a designated purpose.
- A PASS-THROUGH FUND is one in which the fund advisor may grant out of the principal

www.WinonaCF.com

2016 Advised Grants

2016 Advised Grants Total
\$1,260,352

The vast majority of funding made available through the Winona Community Foundation to local and other non-profits is initiated at the request of donors who have various funds with the Foundation.

35%.....	Human Service
22%.....	Education
15%.....	Athletics
9%.....	Religious
7%.....	Other
7%.....	Civic
5%.....	Arts
2%.....	Health



One vision. Many paths.



Best Practices. Accountability. Impact.

ARTS

Bluff Country Studio Art Tour	
Commonweal Theatre Company	
Frozen River Film Festival	
Great River Shakespeare Festival	
Mid West Music Fest	
Minnesota Beethoven Festival	
Minnesota Conservatory for the Arts	
Minnesota Marine Art Museum	
Polish Cultural Institute of Winona	
Theatre du Mississippi	
Wally Russell Foundation	
Winona Arts Center	
Winona Dakota Unity Alliance	
Winona Oratorio Chorus	
Arts Grants Total	\$57,423

ATHLETIC

American Birkebeiner Ski Foundation	
Euro Football Club	
Minnesota High School Cycling League	
Morrie Miller Athletic Foundation	
Pedal the Cause	
Texas Oilman's Charity Invitational Fishing Tournament	
Winona Area Mountain Bikers	
Winona Area Raptors La Crosse League	
Winona Family YMCA	
Winona State Warrior Club	
YMCA Camp Olson	
Athletic Grants Total	\$183,200

CIVIC

ASPC Gift Processing Center	
CASA of the Fox Cities	
City of Winona	
Denver Rescue Mission	
Goodview Activity Group	
North Liberty Community Pantry	
Oxfam America	
Pickwick Mill Inc	
Safe America Foundation	
Saint Mary's Cemetery of Winona	
Salvation Army	
Veterans Memorial Association	
Winona County Historical Society	
Winona HIMS of Winona	
Winona International Friendship Association	
Winona Police Department	
Winona Rotary Service Foundation	
Winona Volunteer Services	
Civic Grants Total	\$84,993

EDUCATION

Bluffview Montessori School	
Catholic Schools Foundation of Winona	
Cotter Schools	
Dowling Catholic High School	
Drake University	
Friends of the Library of Collier County Inc	
Friends of Winona Public Library	
Grinnell College	
Hope Lutheran High School	

EDUCATION (continued)

Junior Achievement - Upper Midwest	
Lewiston / Altura Public Schools	
Marquette University	
Minnesota Public Radio	
Minnesota State College - SE Tech Foundation	
Ready Set School Winona County Inc	
Ridgeway Community Association	
Saint Mary's University of Minnesota	
Twin Cities Public Television	
Winona Area Catholic Schools	
Winona Area Catholic Schools Foundation	
Winona Area Public Schools	
Winona Area Public Schools Community Education	
Winona Area Public Schools Foundation	
Winona Public Library	
Winona Senior High School	
Winona State University - Admissions	
Winona State University Foundation	
Yinghua Academy	
Education Grants Total	\$271,967

HEALTH

Alzheimer's Disease & Related Disorders	
American Cancer Society	
Asperger's / Autism Network Inc	
Hiawatha Valley Mental Health Center	
Hubbard House	
Live Well Winona	
Massachusetts General Hospital	
Saint Anne Foundation	
Sauer Memorial Home	
St Jude Children's Research Hospital	
St. Charles Area Hospice	
Winona Area Hospice Services	
Winona Health Foundation	
Donor Advised Health Grants Total	\$26,851

HUMAN SERVICE

American Red Cross - Winona County Chapter	
Big Brothers / Big Sisters of Greater Winona	
Birthright	
Bluff County Family Resources	
Catholic Relief Services	
Family and Children's Center	
Food for the Poor Inc	
Habitat For Humanity	
Home and Community Options	
Hope for the Warriors	
Options for Homeless Residents of Ashland	
Project FINE	
Samaritan's Purse	
SEMCAC	
Solomon's Song	
Southeast Minnesota Rural Education	
St Elizabeths Hospital of Wabasha	
United Way of Greater Winona Area	
United Way of the Greater Chippewa Valley	
Winona County DAC	
Winona ORC Industries Inc	
Winona Senior Friendship Center Activity Council	
Winona Volunteer Services	
Womens Resource Center of Winona	
Human Service Grants Total	\$439,861

RELIGIOUS

Adventures in Missions Inc	
Aspen Ridge Church	
Boston Minstrel Company	
Cathedral of the Sacred Heart	
Catholic Charities - Winona Diocese	
Catholic Foundation of Southern MN	
Central Lutheran Church	
Cross Catholic Outreach	

RELIGIOUS (continued)

Diocese of Winona	
Hope Community Church	
Immaculate Heart of Mary Seminary	
Living Light Church	
Our Lady Help of Christians Parish	
Pleasant Valley Church	
SON Ministries	
St. John's United Church of Christ	
St. Mary's Catholic Church	
St. Stanislaus Church	
Wesley United Methodist Church	
Religious Grants Total	\$109,442

UNCLASSIFIABLE

Boy Scouts of America - Northern Tier	
Boys Scouts of America	
Grants to Other Funds	
Minnesota Elks Youth Camp	
Southern Poverty Law Center	
Winona Area Humane Society	
Yosemite Conservancy	
Unclassifiable Grants Total	\$86,614



WINONA
COMMUNITY
FOUNDATION

One vision. Many paths.



2016 General Fund Grants

Winona Community Foundation is pleased to list the grants awarded in 2016. Our community grants are at this time in the honor and name of the William and Beverly Larson Fund. This family had the foresight in its wishes to continue its philanthropy by intrusting the Foundation, with the guidance of a Grant Committee, to support nonprofits in this community for years to come.

1st Quarter

Project FINE, funding supported the safe and healthy families program. This program provide education to refugees and immigrants in Winona, promoting positive family relationships, household safety and disaster preparedness.

Wesley United Methodist Church needed support to off-set the production cost for the community play Charlotte's Web.

Big Brothers Big Sisters implemented structured, healthy living activities with a program called REACH. This worked with the community, workplaces, schools and health care organizations to increase opportunities for active living and healthy eating for the mentors and children in the program.

2nd Quarter

Junior Achievement received funding for a program that is dedicated to educating students in grades K-12 about entrepreneurship, work readiness and financial literacy through experiential, hands-on programs.

Winona Area Mountain Bikers received funds to develop low maintenance, beginner level multi-use trails on City of Winona land in Bluffside Park between Holzinger Lodge and Clarks Lane. The goal is to provide an environmental sustainable trail for people of a wide range of abilities and skills.

Winona Arts Center needed funding for the replacement of cedar siding, carpentry, scraping and painting of the exterior of the Winona Arts Center. This is a historic building in Winona that is used by many community members.

Winona Area Public Schools nutrition department needed funds to assist in paying for the remodel of a school bus to be used as a summer lunch bus. They are partnered with the Winona Public Library and meals were served from the summer lunch bus in front of the entrance to the Library.

3rd Quarter

Ready Set School supports children receiving basic and necessary clothing as well as supplies to start a successful school year. One hundred percent of funds raised are given to Winona County children in the form of vouchers to be spent at local retailers.



Cars-N-Credit Backpack Donation to Ready Set School

Women's Resource Center relocated in early October to Latch and Sons building. The grant received with supply office equipment that needed upgrades as they enter a new workspace.

Winona Friendship Center is working with Winona State University student volunteers to take iPads equipped with internet connectivity to client's homes to introduce them to accredited programming that the center currently uses. The goal is to engage more members to use the Friendship Center.

4th Quarter

St John's United Church of Christ provided a backpack meal program designed to help meet the nutrition needs of hungry children on weekends when they do not have access to school breakfast and lunches. Through this program, participating children were given special backpacks filled with easy to prepare, non-perishable food. The backpack will also contain educational information on nutrition and health lifestyle choices.

The Foundation for Winona Area Public Schools' purpose is to enrich and expand educational opportunities in Winona Area Public Schools by supporting important programs and projects that would not otherwise be funded through normal district resources. Currently there is a shortfall in funding educational needs of the students. Funding from WCF will directly impact the advancement of students.

Winona ORC had an immediate need of a shredder for the shredding program. The program not only provides meaningful work hours for the clients but is a wonderful source of income to support all the programs offered.

BECOME A MEMBER OF THE LEGACY SOCIETY

Funds may be created to support philanthropic goals now, or to benefit the community in the future. The Legacy Society of the Winona Community Foundation recognizes people who have provided for future gifts to the community through bequests, charitable trusts, charitable gift annuities or life insurance.

Those individuals who have qualified in the past or currently have agreed to be listed as members of the Legacy Society include:

Erika & Robert Gilbertson

Nancy & Mark Kristensen

Dr. Thomas E. & Leone J. Mauszycki

Jennie L. & Lyndon Pierce

Judy & Charles Shepard, M.D.

FOUNDERS FUND

The Founders Fund was created to honor all of the individuals who planted the seed for the start of Winona Community Foundation in the 1980s. This endowed fund awards dollars to a local non-profit chosen in the name of an individual or organization who has clearly touched community life for all time. Past recipients of this award include:

Louis De Thomasis, Saint Mary's University, Past President

Dr. Darrell Krueger, Winona State University, Past President

Ms. Gloria Ames, Community Volunteer

Tim Burchill, Past Development Program Director at Saint Mary's University of Minnesota

Sue Cornwell, Community Leader & First President of WCF

The Winona Hims

Patte Peterson, Past Board Member of Winona Community Foundation

Planned Giving

Everyone should have an estate plan to ensure that their hard-earned assets reach loved ones and organizations held dear. Part of planning your estate intelligently may include maximizing the taxes you save by increasing the dollars you give. Proper estate planning could reduce or potentially eliminate estate taxes through planned giving.

If your estate is quite large and contains highly appreciated property, it may be possible to gift to charity while passing more to your heirs than otherwise would be possible without the charitable gift.

Giving strategies may span the range from simple to very complex. They may include giving during one's lifetime, by bequest, or both. This article will focus on giving after death.

Effective estate planning usually takes time, effort and a good attorney. Proper planning allows your family to avoid the delay, dissension and needless expense that often occurs when a loved one dies intestate. Also, I recommend that you talk with your family about what your intentions are and why you made the choices you have made, thereby potentially minimizing disputes and/or disappointment after you pass.

PLANNED GIVING - WHAT IS IT?

A "planned gift" is a gift that will be distributed at some point in the future. The easiest way to make a planned gift is by designating the charitable organization as a beneficiary in your Last Will and Testament or in your Trust. The charitable organization can also be named as a beneficiary of a life insurance policy, annuity contract, or retirement account.

AVOID TAXES

Making a charity the beneficiary of your Traditional IRA, 401(k) or other qualified plan allows you to forego income and estate tax levied on these plans on the Federal and State levels. This means that, in most situations, your donation is worth more to the charity than to your heirs.

BE SMART

Typically it is smart to give the most-taxed asset in your estate to charity and leave the more favorably taxed property to your heirs. Making a planned gift ensures that when you are gone, your resources will keep giving to the future of that charity.

CURRENT LIMITS

The Estate Tax Exemptions are \$1,200,000 in Minnesota and \$5,340,000 Federally. This means that you can pass up to \$1,000,000 Estate Tax free to the person or place of your choosing.

Community General Fund Donors

The Foundation's Community General Fund is the resource from which grants are allocated to organizations in the Winona area. Competitive grant applications are submitted and funding is based on a set of granting guidelines and criteria.

GENERAL DONORS

James & Barbra Allaire

Dan & Jeni Arnold

Dan & Diane Amundson

Elizabeth Bach
In Memory of Elizabeth Bach

Eric Bartleson

Jane & Bob Bartz

Butch & Lynne Beier

Scott & Jane Biesanz

Andy & Jan Blomsness

Frank Bures MD

Brian & Sandra Burke

Mike & Linda Cichanowski

Gayla Clemons

Charlotte Clark

Wade & Pam Davick

Dennis & Vicki Decker

Bob & Marjorie Deter
In Memory of Mark Deter

James & Mary Eddy

Greg & Terri Evans

Phil & Barb Feiten

Fred & Shelly Smith Fletcher

Leslie Foote

Joan Greshik Farms LLC

John Howard

Robert & Sue Hoodecheck

Robert A. Kierlin &
Ms. Mary Burchichter

Harland & Pauline Knight

Robert Kohner

Dale & Linda Kukowski

Bill & Shelly Leaf

Laurie Lucas

Cynthia Marek

William & Joan McNeil

John & Shelley Milek

Hugh & Vera Miller

John & Marlene Mulrooney MD

Dennis & Patricia Nolan MD

Bud & Karen Nystrom

Scott & Kelley Olson

Carol Orłowski

Corwin & Arvie Osterloh

Jerry & Pat Papenfuss

Dick & Sandy Pope

John & Betsy Rowekamp MD

Charles & Judy Shepard

Barb & Steve Slaggie

Ronald & Diane Stevens

Donald Stone & Carol Heyl

Jean Theis

Scott & Kathy Turner M.D.

Gary & Debra Watts

Nancy Wiltgen

Tom & Barb Wynn

BUSINESS SPONSOR

Winona National Bank

FOUNDATIONS/OTHER

Bristol -Myers Squibb
Foundation

Fidelity Gift Fund

Monumental Sales

The K Foundation

Winona State Foundation

Venables Foundation

See us online to find out about...

- donating
- grants and grant applications
- advisor resources
- events & other useful resources



www.winonacf.org

Winona Community Foundation

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Winona, MN 55987

***Demonstrate your philanthropy and
be part of the solution by creating
long-lasting, positive change.***



One vision. Many paths.

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