

Carl A Nelson Charitable Foundation 2016 Newsletter

By: Christine Robertson, Foundation Sec/Treas

The Purpose of the Foundation

The Carl A. Nelson Charitable Foundation was established in 2004 to provide a way for Carl A. Nelson & Company and its employees to work together to fund charitable activities. Since its inception, the Foundation has, helped employees in times of severe financial distress due to illnesses. Scholarships for dependents of company employees in addition to deserving Southeastern Community College Construction Trades students have also been funded through the Foundation.

In addition to providing support for Carl A. Nelson & Company employees and their dependents, the Foundation can support other tax exempt entities in their efforts to provide relief to certain individuals and promote social welfare. The Foundation has done this through contributions to many civic projects within the primary geographic area that is served by Carl A. Nelson & Company.

Supporting Employees



Providing support for employees in times of need was the motivation for the formation of the Foundation. Over the years, Carl A. Nelson & Company and employees, past and present, have provided support for other employees through the Foundation.

The Foundation has provided close to \$49,000 to employees who have fallen on hard times due to an illness by helping with the payment of health insurance premiums and other expenses deemed appropriate by the Board. This financial help provides some relief of the financial stress that these families are facing and is a consistent reminder during their difficult time that Carl A. Nelson & Company and their co-workers genuinely care about them and their families.

Contributing to Education

There are two scholarships that the Foundation funds for dependents of employees. These two scholarships are the Louis H. Kuepper Memorial Scholarship and the Timothy S. Ballard Scholarship. Both scholarships provide \$2,000 towards educational expenses for the student.

The current year recipients of these scholarships are:

Alexa Jaeger (daughter of Don Jaeger) is the recipient of the Louis H. Kuepper Memorial Scholarship. Alexa graduated from Burlington Community High school in May and plans to attend Kirkwood Community College majoring in nursing, with a goal of transferring to the University of Iowa to complete her education.



Carl A Nelson Charitable Foundation 2016 Newsletter

By: Christine Robertson, Foundation Sec/Treas

Denver Post (daughter of Pebbles Schneider) is the recipient of the Timothy S. Ballard Scholarship. Denver (photo not available) is currently attending Southeastern Community College pursuing a degree in Biomedical Electronics and is hoping to find a job in a hospital near this area.



Whenever possible, Tim Seibert, President of Carl A. Nelson & Company and member of the Foundation's Board of Directors, attends the award ceremony at the high schools for our scholarship recipients who are high school seniors. This past spring he was able to award the scholarship to Alexa Jaeger at the Burlington Community High School awards ceremony.

In addition to these two scholarships, starting with the 2013-2014 school year, a Merit Scholarship in the amount of \$1,000 is available to the SCC

Construction Trades program. This is awarded as the Carl A. Nelson Scholarship and it is for students starting their second year of the program.

The student who receives this award is selected by an SCC Construction Technology Instructor who is familiar with the students' performance in class. Bryton Hopp was awarded the Carl A. Nelson Scholarship for the 2016-2017 school year.

Past recipients of the Louis H Kuepper Memorial Scholarship and Timothy S. Ballard Scholarship include:

Jackie Dowell – daughter of Charlie Carlson
Coy Dorothy – son of Colin Dorothy
Dillyn Mumme - son of Corey Mumme
Kaleb Moser- son of Kevin Moser
Ashleigh Harris - daughter of Mike Harris
Megan Culp – daughter of Dan Culp
Alicia Dixon – daughter of Brian Dixon
Brianna Burns – daughter of Bill Miskovic

Judy Gates – daughter of Mike Gates
Caitlin Bliesener – daughter of Jerry Bliesener
Brandi Stewart - daughter of David Stewart
Kelly Dorothy- daughter of Colin Dorothy
Ryan Utter – son of Greg Utter
Ben Jaeger – son of Don Jaeger
Whitney Pannell – daughter of Scott Gengenbach

Past SCC Construction Trades students who have received the Carl A. Nelson Scholarship include:

Tiffanie Rourke

Josh Ragain

Keegan Lanz

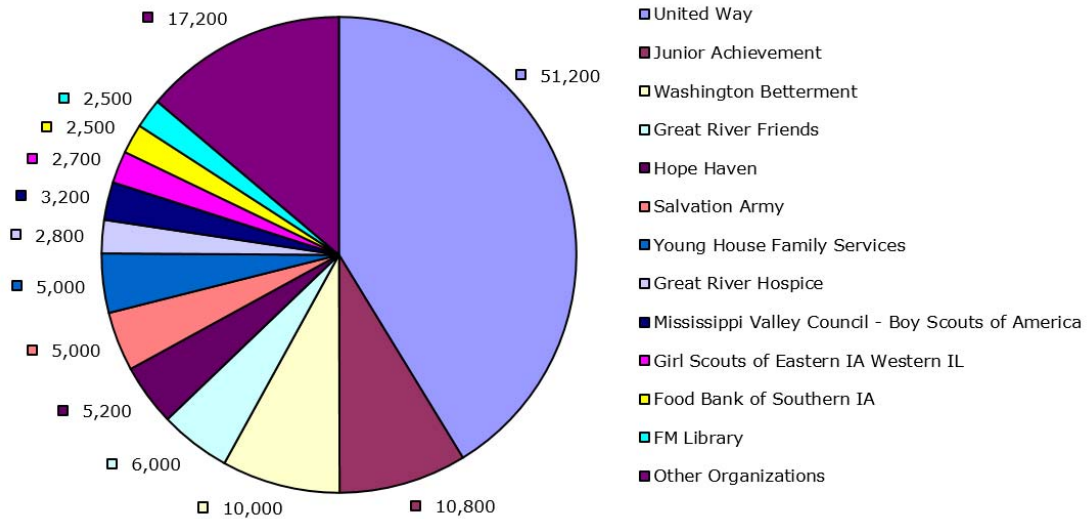
Supporting the Community

In addition to supporting employees, distributions from the Foundation are made to contribute to many civic projects within the primary geographic area. Over the years, distributions to other organizations and civic projects from the Foundation have totaled approximately \$124,100.

Carl A Nelson Charitable Foundation 2016 Newsletter

By: Christine Robertson, Foundation Sec/Treas

The chart below shows how those funds have been distributed among various organizations:



Contributions were made this year for the first time to: Garrett’s Path, which raises money to provide financial support for organ donation awareness, youth academics and youth athletics; Building Bridges, a Southeast Iowa Initiative to impact the futures of those in poverty; and the Fort Madison YMCA’s annual campaign fund.

In addition to those organizations receiving first-time contributions, the following organizations are also receiving contributions this year from the Foundation: The Burlington Area United Way, Great River Friends, Young House Family Services, Junior Achievement, Hope Haven, Boy Scouts of America’s Mississippi Valley Council, Girl Scouts of Eastern Iowa and Western Illinois, Great River Hospice, Burlington YMCA, University of Iowa Dance Marathon, Salvation Army Food Bank, Big Brothers Big Sisters in Muscatine, Great River Area Youth Mentoring (formerly the Big Brothers Big Sisters in Fort Madison), and the Burlington Area Homeless Shelter.

Requesting Support

Because the Foundation is a tax-exempt entity, the Foundation can only provide relief to individuals with an extreme financial need due to illness or natural disaster and support to other organizations that are tax exempt entities providing relief to certain individuals and promoting social welfare.

If you know of someone who has a need due to illness or natural disaster, encourage them to contact one of the Board members to request an application. All applications must be submitted by the individual requesting assistance. Requests for individual assistance are evaluated by the Board as soon as possible after they are received.



Carl A Nelson Charitable Foundation 2016 Newsletter

By: Christine Robertson, Foundation Sec/Treas

If you know of a civic project that might be worthy of our support, please provide suggestions to the Board, in writing, at any time during the year. The Board meets on an annual basis in September and generally reviews these requests and suggestions that have been collected throughout the year at that time.

The scholarships are awarded in the spring of each year to a son or daughter of a current full-time Carl A. Nelson & Company employee who is continuing their education beyond high school. Though prior recipients of the scholarships are not eligible, keep in mind that your son or daughter may apply for the scholarships multiple times. If your student has applied for one of the scholarships in the past but was not awarded a scholarship, encourage them to apply again! Memos are sent out in February each year with more information about applying for the scholarships.

Funding the Foundation



The foundation would not exist without contributions from employees, retirees, and Carl A. Nelson & Company. When aggregated all of the dollars contributed add up quickly. Since inception, the Foundation has received more than \$258,400 in contributions. That includes \$191,000 from Carl A. Nelson & Company, and \$67,400 from current and former employees.

All employees are encouraged to make a weekly payroll contribution to the Foundation. You can contribute as little as \$1.00 per week. Contributions can be designated to one of three funds: scholarship fund, relief fund for employee assistance, and the general fund for discretionary giving.

Since the Foundation is a tax-exempt entity, all contributions are tax-deductible and a statement of your tax-deductible contributions will be provided to you after the end of the year.

A contribution form is attached to the newsletter for your convenience if you would like to start making a contribution to the Foundation, or if you would like to increase your current contribution, please fill out the form and return it to the office in Burlington. You may contact Michelle Penrod, Renita Jarrett or Christine Robertson in the Burlington office if you have any questions.

Thank You!

On behalf of your fellow employees, the scholarship recipients, and community organizations that have received support from the Foundation, the Foundation's Board of Directors would like to thank the employees who have contributed to the Foundation over the past year!

Your contributions continue to make a difference!

TO: All Employees and Retirees
 DATE: October 5, 2016
 RE: Carl A. Nelson Charitable Foundation

Carl A. Nelson & Company and its employees have always prided themselves with their willingness to help their fellow man through many different civic-minded channels. Contributing time and resources to the United Way, Relay for Life, Junior Achievement, Salvation Army, American Red Cross, various schools and numerous other organizations and scholarships are just a few of the ways Carl A. Nelson & Company and its employees have helped our community. Another example would be the assistance a number of employees have provided to help fellow employees during an illness.

The Carl A. Nelson Charitable Foundation was established by Carl A. Nelson & Company to provide relief, in our local communities, for individuals with medical, emotional, and physical distress created by unforeseen poverty or extreme financial burden due to illness or natural disaster. Requests for assistance will be reviewed by the Board on a nondiscriminatory basis, applying limited funds where the greatest social good can be accomplished.

The Foundation Board is comprised of three officers of Carl A. Nelson & Company (Tim Seibert, Christine Robertson, and Chris Smith), one other current Carl A. Nelson & Company employee (Pebbles Schneider), plus one outside member (Charlie Carlson, a Carl A. Nelson & Company retiree).

Employees who elect to contribute to the Foundation may do so on either a lump sum basis or through payroll deduction. You may also specify how your funds are to be used by selecting any of the three funds: The Relief Fund for hardship assistance, The Scholarship Fund for educational expenses, or The General Fund which is distributed at the discretion of the Board.

As this Foundation is qualified under the Internal Revenue Service guidelines as a 501(c)(3) organization, your contributions are tax deductible. A statement of your tax-deductible contributions will be provided to you after the end of the year.

If you are interested in contributing to the Carl A. Nelson Charitable Foundation, please complete the bottom portion of this memo and return to Renita Jarrett, Payroll Manager.

I request that Carl A. Nelson & Company withhold \$_____/week from my pay for the Carl A. Nelson Charitable Foundation.

I request that Carl A. Nelson & Company withhold a one-time deduction of \$_____ from my pay for the Carl A. Nelson Charitable Foundation.

My donation of \$_____ is enclosed. (Checks may be made payable to Carl A. Nelson Charitable Foundation.)

I would like my contribution to be designated to:

- The Relief Fund
- The Scholarship Fund
- The General Fund

Signature

Date