

Carl A Nelson Charitable Foundation 2014 Newsletter

By: Christine Robertson, Foundation Sec/Treas

The Purpose of the Foundation

The Carl A. Nelson Charitable Foundation was established in 2004 to fund charitable endeavors. Since its inception, the Foundation has helped employees in times of severe financial distress due to illnesses, funded college scholarships for dependents of company employees in addition to deserving Southeastern Community College Construction Trades students, and has contributed to many civic projects within the primary geographic area that is served by Carl A. Nelson & Company.

Supporting our Employees



Providing this support for employees in times of need was the motivation for the formation of the Foundation. Over the years, the Foundation has provided over \$37,000 to employees who have fallen on hard times due to an illness. The foundation uses these funds for the payment of health insurance premiums and other expenses deemed appropriate by the Board.

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. Requests for financial support for an individual employee must be submitted by the employee themselves. The employee must complete an application and provide documentation to support the financial need. Individual requests for assistance are reviewed by the Board as soon as they are submitted.

The Foundation is a tax-exempt entity and all requests for assistance must be approved by the Board. Due to the tax-exempt status, the Foundation can only provide relief to individuals with an extreme financial need due to illness or natural disaster. The Foundation can also provide support to assist certain other organizations in their charitable purpose.

Contributing to Education

The Foundation also funds two scholarships for dependents of employees, the Louis H. Kuepper Memorial Scholarship and the Timothy S. Ballard Scholarship. Both scholarships provide \$2,000 towards educational expenses for the student. Keep your eyes and ears open for reminders that will come out in the Spring or simply contact the office in February for an application form and the necessary requirements.

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, please keep in mind that your son or daughter may apply for the scholarships multiples 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!

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 the awarded as the Carl A. Nelson Scholarship and it is for students starting their second year

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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.

The current year recipients are:



Coy Dorothy (son of Colin Dorothy) is the recipient of the Timothy S. Ballard Scholarship. Coy is pursuing a career in Education. He is currently attending MacMurray College in Jacksonville, IL.



Caitlin Bliesener (daughter of Jerry Bliesener) is the recipient of the Louis H. Kuepper Memorial Scholarship. Caitlin's goal is to become a teacher. She is currently a student at Southeastern Community College working on obtaining an Associates of Arts Degree and then she plans on attending a four-year college.

Past recipients include: Dillyn Mumme - son of Corey Mumme, Brandi Stewart - daughter of David Stewart, Kaleb Moser- son of Kevin Moser, Kelly Dorothy- daughter of Colin Dorothy, Ashleigh Harris - daughter of Mike Harris, Ryan Utter – son of Greg Utter, Megan Culp – daughter of Dan Culp, Ben Jaeger – son of Don Jaeger, Alicia Dixon – daughter of Brian Dixon, Whitney Pannell – daughter of Scott Gengenbach, and Brianna Burns – daughter of Bill Miskovic.

The Carl A. Nelson Scholarship for the SCC Construction Trades student was awarded for the 2014 -2015 school year to Tiffanie Rourke and for the 2013-2014 school year to Josh Ragain.

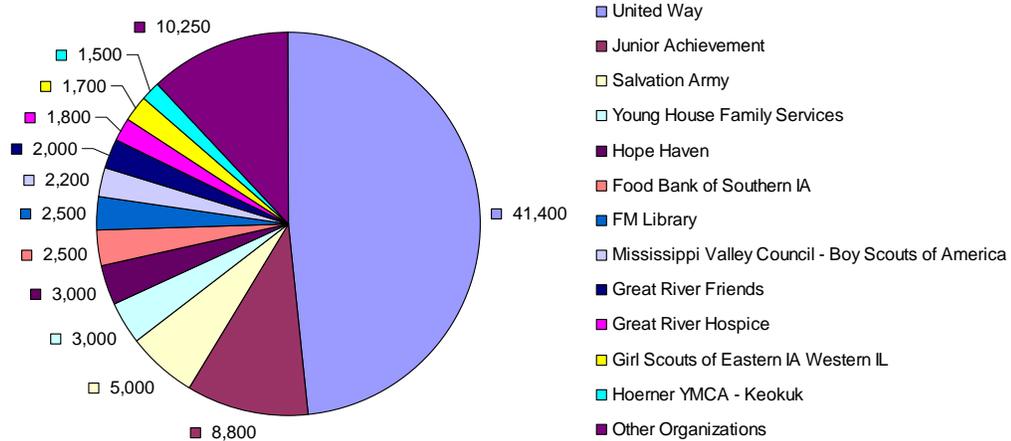
Supporting the Community

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. Contributions were made this year for the first time to the Cystic Fibrosis Foundation and the Burlington area Homeless Shelter based on suggestions made by employees.

Distributions from the Foundation over the years to other organizations and civic projects have totaled approximately \$85,650. Below is a chart showing you how those funds have been distributed among various organizations:

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This year contributions are being made to the following organizations: 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, Salvation Army Food Bank, Big Brothers Big Sisters in Muscatine, the Burlington Area Homeless Shelter, and the Cystic Fibrosis Foundation.

Funding the Foundation

Contributions to the Foundation come from employees, retirees, and Carl A. Nelson & Company. All contributions are designated into one of three funds: scholarship fund, relief fund for employee assistance, and the general fund for discretionary giving. Since inception, the Foundation has received almost \$192,200 in contributions. That includes \$141,000 from Carl A. Nelson & Company, and \$51,200 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. When aggregated with other employees' contributions, all of the dollars add up quickly. The contributions allow the Foundation to carry out its function. Since the Foundation is a tax-exempt entity, all contributions are tax-deductible. 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. You may contact Mike Westfall, Renita Jarrett or Christine Robertson if you have any questions.

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The Foundation's Board Members

The Foundation is governed by a Board of Directors currently consisting of five members.

Tim Ballard, who was the driving force in establishing the Foundation and who has been on the board since the formation of the Foundation in 2004 has recently resigned from the Board. We sincerely thank Tim for his contributions to the Foundation over the years!

Continuing on as Board members are; Tim Seibert and Len Johnson, who have been on the board since 2004, Chris Smith who joined the Board in 2007, and Christine Robertson who joined in 2011.

The continuing Board members welcome Pebbles Schneider to the Board. Pebbles was elected to be the fifth Board member, filling the vacancy left by Tim Ballard's resignation.



Thank You!

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

Your contributions make a difference!

TO: All Employees and Retirees
DATE: September 16, 2014

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. Three types of funds have been established; Relief Fund, Scholarship Fund, and a General Fund for other giving to promote social welfare.

Grant applications will be reviewed by the Board on a nondiscriminatory basis, applying limited funds where the greatest social good can be accomplished. The Board is comprised of three officer's of Carl A. Nelson & Company (Tim Seibert, Christine Robertson, and Chris Smith), one other current Carl A. Nelson & Company employees (Pebbles Schneider), plus one outside member (Len Johnson 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