

Carl A Nelson Charitable Foundation 2015 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 funded college scholarships for dependents of company employees in addition to deserving Southeastern Community College Construction Trades students. The Foundation has also contributed to many civic projects within the primary geographic area that is served by Carl A. Nelson & Company, and helped employees in times of severe financial distress due to illnesses.

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 coming 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, 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!

The current year recipients are:



Jackie D. Dowell (daughter of Charlie Carlson) is the recipient of the Louis H. Kuepper Memorial Scholarship. Jackie is pursuing a career in the medical field. She is currently attending Kirkwood Community College and is on the waiting list for the Surgical Technologist program.

Judy Gates (daughter of Mike Gates) is the recipient of the Timothy S. Ballard Scholarship. Judy graduated from Burlington Community High School in May and plans to attend Southeastern Community College with a goal of transferring to the University of Iowa to complete her education.



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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 Judy Gates 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. The Carl A. Nelson Scholarship for the SCC Construction Trades student was awarded for the 2015-2016 school year to Keegan Lanz. Past recipients of this scholarship were Tiffanie Rourke and Josh Ragain.

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

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

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

Supporting our Employees

Providing
support
when and
where you
need it



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.

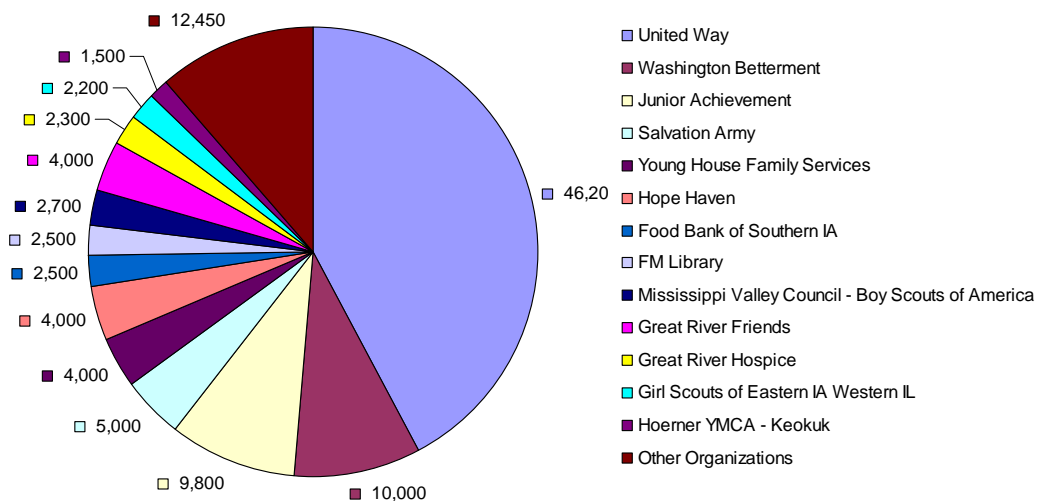
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Supporting the Community

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 University of Iowa Dance Marathon which raises money to provide financial support for pediatric oncology patients and their families, Burlington Public Library Meeting Room Fund, and Big Brothers Big Sisters – Fort Madison.

Distributions from the Foundation over the years to other organizations and civic projects have totaled approximately \$109,150. Below is a chart showing you how those funds have been distributed among various organizations:



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, Burlington YMCA, Salvation Army Food Bank, Big Brothers Big Sisters in Muscatine, Big Brothers Big Sisters in Fort Madison, the Burlington Area Homeless Shelter, and the University of Iowa Dance Marathon.

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

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Foundation has received almost \$222,500 in contributions. That includes \$166,000 from Carl A. Nelson & Company, and \$56,500 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 in the Burlington office if you have any questions.

The Foundation's Board Members

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

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, and Pebbles Schneider who joined the board in 2014.

Thank You!

On behalf of the scholarship recipients, 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 continue to make a difference!