

Carl A Nelson Charitable Foundation 2018 Newsletter

The What, the Why, and the How

WHAT

The Carl A. Nelson Charitable Foundation (the Foundation) was established in 2004. The Foundation is a nonprofit, tax-exempt entity that is governed by a Board of Directors currently consisting of five members. The Board members are; Tim Seibert, who has been on the Board since 2004, Chris Smith who joined the Board in 2007, Christine Robertson who joined in 2011, Charlie Carlson, a retired employee of Carl A. Nelson & Company, who joined the board in 2017, and James Maletta who also joined the Board in 2017.

*the what
the why
and the how*

WHY

With the existence of the Foundation, Carl A. Nelson & Company and its employees are able to work together to fund charitable activities. Because the Foundation is a tax-exempt entity and contributions received by the foundation are tax deductible to those who are making the contribution, the funds received by the Foundation can go a lot further in helping support the charitable endeavors of the Foundation.

Providing support for employees in times of need was the motivation for the formation of the Foundation. As a result, the purpose of the foundation includes assisting fellow employees and their families in medical, emotional and physical distress created by extreme financial burden due to an illness or natural disaster. In addition, the Foundation provides scholarships and supports other similar-minded charities in the area.

HOW

The Foundation would not exist without contributions from employees, retirees, and Carl A. Nelson & Company. When aggregated all of the dollars that are contributed add up quickly. Since inception, the Foundation has received over \$320,000 in contributions, which includes close to \$88,000 from current and former employees.

We encourage Carl A. Nelson & Company employees to make a weekly payroll contribution to the Foundation. 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. Just fill out the form and return it to the office in Burlington if you would like to make a one-time contribution, start making weekly contributions to the Foundation through a payroll deduction, or if you would like to increase your current contribution. Keep in mind that you can contribute as little as \$1.00 per week. If you have any questions you can contact Renita Jarrett or Christine Robertson in Carl A. Nelson & Company's Burlington office and they would be happy to help you.

Supporting Education

There are two scholarships that the Foundation provides 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. Each spring the Foundation accepts applications for scholarships from any child of a Carl A. Nelson & Company employee who is continuing their education beyond high school. Applications are generally due by the first part of April, so if you have a student who would qualify, please make sure to submit an application at that time.

A memo will be sent out in the spring to remind you and provide more information about the scholarships. 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!



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We only received one application in 2018 from a dependent of an employee, so someone probably missed out on the opportunity to receive a \$2,000 scholarship by not turning in an application.



Colton Ketcham (son of Kathy Ketcham), pictured to the left, is the recipient of the Louis H. Kuepper Memorial Scholarship this year. Colton graduated from Danville High School in May. While in high school, Colton was Student Body President, a State Student Council Officer, captain of both the swimming and golf teams, earned his Eagle Scout rank and was awarded an international internship that was sponsored by the World Food Prize. The international internship gave Colton the opportunity to travel to Kenya this past summer to be involved in a research project. Colton is currently attending the University of Iowa to study Bio-medical Engineering.

In addition to the Louis H. Kuepper Memorial Scholarship and the Timothy S. Ballard Scholarship, the Foundation provides another scholarship, the Carl A. Nelson Scholarship. This scholarship is for \$1,000 and is provided to a second-year Construction Technology student at Southeastern Community College (SCC). For 2018, the recipient of the Carl A. Nelson Scholarship was selected by an SCC Construction Technology

instructor who is familiar with the students' performance in class.

The instructor actually contacted us and requested that we split the scholarship in half because there were two very deserving students. Instead of splitting the scholarship into two \$500 scholarships, the Foundation's Board of Directors voted to provide a second \$1,000 scholarship. Therefore, this year Remington Benz, pictured to the right, and Broc Mullin (not pictured) both were awarded a Carl A. Nelson Scholarship for the 2018-2019 school year.



Remington graduated from Mediapolis High School. He said that he has always wanted to work with his hands and would eventually like to own his own construction company. Remington enjoys boating, waterfowl hunting and watching the Cubs and Forty-Niners play.

Broc Mullin, along with the other two scholarship recipients, sent a note of appreciation thanking the Foundation for its generosity and support.

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

Zach Jaeger – son of Don Jaeger
Alexa Jaeger – daughter of Don Jaeger
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

Jayde Mumme – daughter of Corey Mumme
Denver Post – daughter of Pebbles Schneider
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:

Bryton Hopp Tiffanie Rourke Josh Ragain Keegan Lanz John Denning

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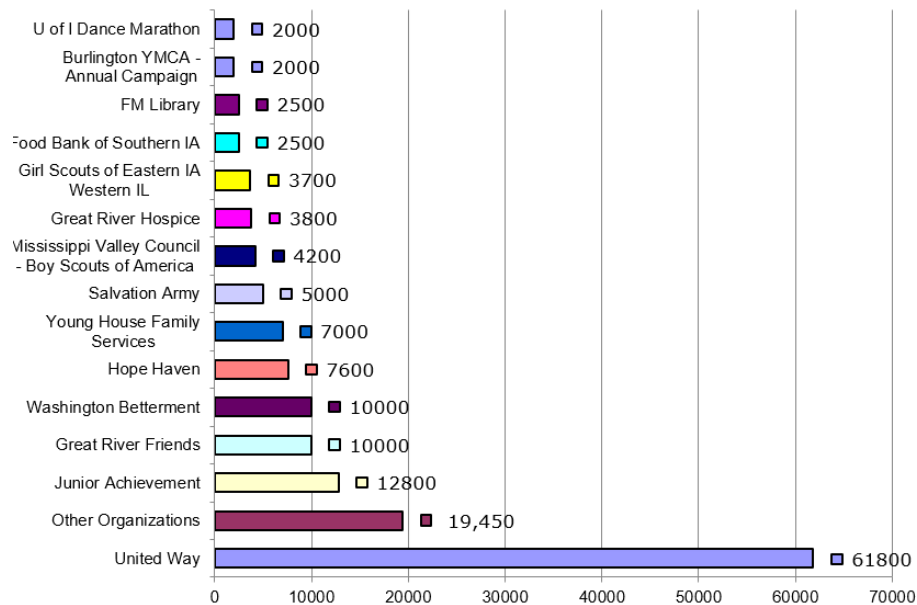
Supporting Others

Through the Foundation, Carl A. Nelson & Company and its employees, past and present, have provided over \$50,000 of support for other employees who have fallen on hard times due to an illness. If you know of a fellow employee 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. 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.

In addition to supporting employees, the Foundation can and does support other organizations that are tax exempt entities providing relief to certain individuals and promoting social welfare. Distributions from the Foundation are made on an annual basis to contribute to many like-minded civic organizations supporting the surrounding communities.

You are encouraged to notify the Foundation if there are organizations that you support, has supported you, or you otherwise feel the Foundation’s Board should consider when making decisions about contributions. You can notify the Foundation at any time throughout the year. Generally, the Board meets in early September to review all of the requests.

Over the years, distributions to other organizations and civic projects from the Foundation have totaled almost \$155,000. The chart below shows how those funds have been distributed among various organizations:



Contributions were made this year for the first time to the Alzheimer’s Association and Hair, Hats & More. Hair, Hats & More is a program that provides wigs, scarves, hats, etc., to Great River Cancer Center patients who are losing their hair. 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 – Work Services Program, 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, the Burlington Area Homeless Shelter, Building Bridges, and the Fort Madison YMCA’s Annual Campaign Fund.

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Thank You!

Here is what some of the organizations that the Foundation has provided support to have to say:

“On behalf of Great River Cancer Center, we would like to thank you for your generous donation towards our Hair, Hats & More Program. This program has been a life changer for so many patients in our community. This program is funded on donations only and we certainly cannot thank you enough.” ~ Hair, Hats & More



“Thank you for your donation to Big Brothers Big Sisters of Muscatine County! Your gift... will help make matches possible for more children in our community. As you know, Big Brothers Big Sisters is a donor-supported volunteer organization that works to change the lives of youth for the better, forever. Your support enables us to continue to provide children facing adversity in Muscatine County with strong and enduring, professionally supported, one-to-one relationships with caring volunteers. Again, thank you for thinking of us and your contribution to Big Brother’s Big Sisters!” ~ Big Brothers Big Sisters of Muscatine County

“We thank you so very much! On behalf of Hope Haven, we are grateful to you for selecting us as one of your charities. We will use your contribution to make improvements to our Work Services Can Redemption Center. Currently, our redemption center is the only one in town and our business has increased dramatically. This is a great program for us as it provides employment for the good folks we serve. Thank you very much for assisting us in our mission.” ~ Hope Haven

“Thank you so much for your generous donation. People like you help us care for those in need.” ~ Burlington Area Homeless Shelter

“Your generosity makes a positive difference in the world. Please accept our warmest thanks...” ~ The University of Iowa Foundation for the U of I Dance Marathon

“Thank you so much for your donation... we truly appreciate your gift...It is because of generous community minded people that we are able to continue our mission, and for that we thank you with all of our heart!” ~ The Salvation Army of Burlington

“Thank you for supporting Test Kitchen Education Foundation. Your donation is greatly appreciated! ~ Elliott’s Test Kitchen

“Thank you for trusting us to be good stewards of your generosity and for valuing the future for girls! ~ Girl Scouts of Eastern Iowa and Western Illinois

On behalf of all of the community organizations, your fellow employees, and the scholarship recipients that have received support from the Foundation, the Foundation’s Board of Directors would like to thank you for your support!

TO: All Employees and Retirees
 DATE: October 15, 2018
 RE: Carl A. Nelson Charitable Foundation

Carl A. Nelson & Company and its employees have always prided themselves with their willingness to help others through many different civic-minded channels. Contributing time and resources to the United Way, Junior Achievement, Hope Haven, various schools and numerous other organizations. Assistance has also been provided to help fellow employees during an illness.

In 2004 the Carl A. Nelson Charitable Foundation (the Foundation) was established 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. As this Foundation is qualified under the Internal Revenue Service guidelines as a 501(c)(3) organization, contributions are tax deductible so the dollars contributed can all be available for charitable purposes. A statement of tax-deductible contributions is provided after the end of the year to those who make a contribution to the Foundation.

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 (James Maletta), plus one outside member (Charlie Carlson, a Carl A. Nelson & Company retiree). Requests for assistance will be reviewed by the Board on a nondiscriminatory basis, applying limited funds where the greatest social good can be accomplished.

Carl A. Nelson & Company employees may elect to contribute to the Foundation through payroll deduction on either a weekly or one-time basis or they can make a direct contribution. 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.

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