2019 ANNUAL REPORT

UNION COUNTY FOUNDATION

Invest Today. Shape Tomorrow.
2019 proved to be a very good year for the Union County Foundation. Record levels were reached in the areas of charitable distributions, number of individual named funds housed at UCF, total number and total aggregate amount of scholarships awarded, and total level of UCF assets. Here are some additional 2019 highlight details:

As of December 31, 2019 we had disbursed $1,305,626.90 in grants for calendar year 2019. These distributions included 184 scholarships totaling $225,083.17 disbursed from 48 named scholarship funds housed within the Foundation.

As of December 31st our assets had increased (year over year) to a total of $12,735,748.80. The one year investment return (thru December 31, 2019) on our long term “umbrella” portfolio was 17.75%, our three year return was 12.37%, and our 5 year return stood at 8.97%. These returns were achieved through a conservative in house managed portfolio that substantially mitigates market risk and minimizes management expenses.

The number of named funds that are housed at the Foundation stands at 113. We added 12 new funds in 2019. The Le Herron Rising Leaders Fund and the Play Like Jay, Jary Truitt Fund are among our new funds. Two successful fundraiser events were hosted by the Foundation in 2019.They were The Union County Foundation Covered Bridges Tour (cycling event) and the Annual Foundation Celebration. Each event was financially successful and advanced awareness of the services and positive impact of the Foundation.

In 2019 we expanded the scope and reach of our Friends of the Foundation program. Largely through the substantial efforts of UCF trustee Cathy Blackford we published a high quality semi annual newsletter that was enjoyed by our Friends of the Foundation supporters. The newsletter continues to build our brand and connect us with the people and organizations of Union County.

The UCF was again acknowledged by Columbus Business First Magazine as one of the top 25 Foundations in Central Ohio based on annual charitable distributions. This honor is a testament to our ability to be charitably impactful even though we are a relatively small Foundation.

In 2019 we again achieved accreditation for meeting the rigorous operational standards set forth by the National Council on Foundations. Lynne Allen played a significant role in navigating the Foundation through the accreditation process. Thank you Lynne!

We continue to be blessed with exceptional trustees and leadership. 2019 UCF Chairperson Christiane Schmenk has been outstanding and we look forward to her continuing as UCF chairperson through calendar year 2020.

Respectfully,

David Vollrath
Executive Director

The Foundation’s IRS Form 990 is available for public review during scheduled office hours or can be viewed at https://projects.propublica.org/nonprofits/organizations/310628641
2019 FOUNDATION OFFICERS
Christiane Schmenk Esq. - Chairperson
Roger C. Nicol - Vice Chairperson
David Allen - Secretary/Treasurer
David Vollrath - Executive Director

2019 Foundation Trustees
David Allen
Cathy Blackford
Bruce Daniels
Judi Green
Chip Hubbs
Gary Lee
Ryan Mickelson CFP AIF
Jennifer Morrison M.D. FACS
Roger C. Nicol
Chris Schmenk
Alan Seymour
R. Mark Stover DO
Jim Vandre RICP
Holly Underwood
Ron Zimmerly

MISSION STATEMENT
To assist individuals and organizations with the accumulation, investment, and distribution of charitable dollars.

VISION STATEMENT
To enhance the quality of life for all the citizens of Union County by promoting and facilitating charitable giving in Union County.
A Personal Legacy of Giving

Donor-advised Fund

What Is a Donor-advised Fund?

The Pension Protection Act of 2006 was a milestone: Recognizing the importance of donor-advised funds, Congress for the first time acknowledged this charitable tool by defining it.

Benefits to the Community

Most donors want their advised funds to support a specific focus within their community.

How Do Donor-advised Funds Benefit the Community?

- Support local causes: Individual contributions strengthen and add to the health of the overall community.
- Allow anyone to be a philanthropist: Donor-advised funds aren’t only for the rich or ultra rich—anyone can set one up.
- Encourage personal interests: Donor-advised funds are expressions of individual philanthropy in a public charity setting.

Simply stated, a donor-advised fund is a charitable vehicle in which a donor contributes cash or assets to create a fund in a “sponsoring organization,” such as a community foundation.

The donor, or someone the donor names, makes recommendations to the sponsoring organization about how the funds should be used. Some donor-advised funds will be fully expended during the donor’s lifetime; others will be a permanent legacy, benefitting communities into the future.

The sponsoring organization educates donors about community needs and about the charities that are working effectively to meet those needs. The sponsoring organization also takes care of the administrative details—tax, legal, and accounting matters.

Why Do People Establish Donor-advised Funds?

- A generous spirit: The most important reason why donors establish advised funds is they are generous and committed people with a passion for their causes and their communities.
- Community focus: People who establish donor-advised funds with community foundations gain access to the foundations’ knowledge of and experience with a range of local charitable organizations. Through events, newsletters, and site visits, donors can learn about effective charities and programs that they may not have discovered on their own. Community foundation staff can also help donors establish their philanthropic goals and devise giving strategies to meet those goals.
- Legacy: Donor-advised funds can be set up as permanent funds, preserving the donor’s legacy long after the donor has passed away.
- Stewardship opportunities: Community foundations and similar public charities employ skilled professional investment managers to increase the value of donors’ gifts, thus maximizing the benefit to the community.
- Accountability: Community foundations are overseen by a public board of directors that reflect their community. These organizations conduct annual audits and file Form 990—making key financial information available to the public.
- Affordability: Donors only need a minimum amount, as determined by the sponsoring organization, to set up a donor-advised fund. For example, community foundations have minimums as low as $10,000 and many also offer “acorn” funds, allowing donors to build up to the minimum.
Make a difference with your Charitable IRA
Annually, people age 70½ and older can transfer up to $100,000 from individual retirement accounts (IRAs) to charity—without incurring federal income taxes today or estate and income taxes in the future.

Union County Foundation Grant Fund
*Meeting ever-changing community needs.*
IRAs transfers to the Union County Foundation Grant Fund address a broad range of current and future needs. The Union County Foundation distribution committee evaluates all aspects of community well-being—arts and culture, community development, education, environment, health and human services—and awards strategic grants to select projects and programs.

**Purpose:** advances the core mission of the Union County Foundation.

**Amount:** any amount qualifies; named fund available for gifts of $5,000 or more.

Field of Interest Fund
*Connecting personal values to high-impact opportunities.*
IRA transfers to Field of Interest Funds allow you to target gifts to causes you care about: arts/culture, community development, crime/drug prevention, education, environment, health, human services, recreation, seniors, youth development, and more. The Union County Foundation awards grants to community organizations and programs addressing your specific interest area.

**Purpose:** specific field of community interest consistent with mission of the Union County Foundation

**Amount:** any amount qualifies; named fund available for gifts of $5,000 or more.

Designated Fund
*Helping local organizations sustain and grow.*
IRA transfers to Designated Funds allow you to support the good work of a specific nonprofit organization—a senior center, museum or any qualifying nonprofit charitable organization.

**Purpose:** support one qualifying nonprofit organization

Organization ________________________________

**Amount:** any amount qualifies; named fund available for gifts of $5,000 or more.

Custom Fund
We’re happy to work with you to establish the unique charitable fund that accomplishes your financial and philanthropic goals.

The above funds qualify for charitable distributions from individual retirement accounts (IRAs) as outlined in Sec. 408(d)(8) of the Internal Revenue Code of 1986; others may qualify as well. Gifts to Donor Advised Funds, Supporting Organizations and most private foundations do not qualify for special charitable.
The opportunity of a lifetime to give the gift of a lifetime.

Qualified charitable IRA transfers to the Union County Foundation are tax-free.

Take advantage of tax-saving gifts to charity. Americans over age 70 1/2 can transfer up to $100,000 annually from an individual retirement account (IRA) into a charitable fund without first paying federal income tax on that gift. By making the gift now, future estate and income taxes can also be avoided. So your clients can give more for less.

Get personalized service from the Union County Foundation. We'll work with you to establish the best vehicle for your client's gift. We can create a fund that meets ever-changing needs, addresses a personal cause or supports a specific agency—all in the name of your client. It's a great way to help your clients experience the joy of giving during their lifetimes.

Reasons people choose to give through the Union County Foundation

One - We are a local organization with deep roots in the community.
Two - Our professional program staff has broad expertise regarding community issues and needs.
Three - We provide highly personalized service tailored to each individual’s charitable and financial interests.
Four - Our funds help people invest in the causes they care about most.
Five - We accept a wide variety of assets and can facilitate even the most complex forms of giving.
Six - We partner with professional advisors to create highly effective approaches to charitable giving.
Seven - We offer maximum tax advantage for most gifts under federal law.
Eight - We multiply the impact of gift dollars by pooling them with other gifts and grants.
Nine - We build endowment funds that benefit the community forever and help create personal legacies.
Ten - We are a community leader, convening agencies and coordinating resources to create positive change.
WHAT FUND TYPE WORKS BEST FOR YOU?

**Donor Advised Funds.** You can have ongoing involvement in the use of your gift. You work with our professional program staff, identifying ways to use dollars from the Donor Advised Fund you establish to address the issues and needs you care about most. Your recommendations are submitted to our local board for approval; we then distribute grant dollars.

**Unrestricted Funds.** Your gift can address ever-changing community needs — including future needs that often cannot be anticipated at the time your gift is made. We evaluate all aspects of community well-being — arts and culture, economic development, education, environment, health and human services, neighborhood revitalization, and more. The flexibility of your unrestricted gift enables your community foundation’s program experts to respond to the community’s most pressing needs, today and tomorrow.

**Field of Interest Funds.** You can target your gift to address needs in an important area of community life. Arts. Aging. At-risk youth. You identify your personal interest area when making your gift; our board awards grants to community organizations and programs that are making a difference in the area you select.

**Scholarships.** You can invest your gift in our community’s future and show students you care, all with the guidance and personal services of The Union County Foundation. You determine the criteria students must meet to receive the Scholarship you establish. With your assistance, students achieve their academic and career-oriented goals — from preschool to postgraduate work.

**Designated Funds.** You can direct your gift to a specific nonprofit organization or purpose. Help provide ongoing funding for a senior center, hospital, or virtually any nonprofit charitable organization. Nonprofit organizations can use a Designated Fund through the Union County Foundation to build their endowment and enhance their ability to accept large and complex gifts.

**Supporting Organizations.** You can use your gift to establish an excellent alternative to a private foundation — with only a fraction of the administrative responsibilities. You maintain personal involvement and support the causes and organizations you care about while enjoying the favorable tax treatment of a public charity. Leave investment management, startup costs, grant administration, and reporting to The Union County Foundation.
AMERICAN LEGION POST #79 LEGACY FUND
CHARLES ANDREW BAESMANN II MEMORIAL FUND
TIM BERG MEMORIAL FUND
SARA MAE BURNSIDE SCHOLARSHIP FUN
Charles E. Byner & Carole Wendy Byner Fund
CARE TRAIN OF UNION COUNTY
BEN & MARY COLEMAN SCHOLARSHIP FUND
KATHRYN & JAMES COLEMAN SCHOLARSHIP FUND
PAT CONLON SCHOLARSHIP FUND
ANDREW DAUM MEMORIAL SOCCER SCHOL. FUND
ANN DAVIS FUND FOR CHARITABLE DONATIONS
BOB & EULA JEAN DAVIS SCHOLARSHIP FUND
ROBERT & JOAN DEATON MEMORIAL SCHOLARSHIP FUND
PAUL & BETTY DEVINE FUND
DISTINGUISHED YOUNG WOMEN OF OHIO FUND
LILA DODD & NANCY ESTHUS SCHOLARSHIP FUND
LARRY & JAN DUNN SCHOLARSHIP FUND
EAGLES BENEVOLENCE FUND
ELIZAVETA FUND
FRIENDS OF ELJER SKATEPARK FUND
ELKS BENEVOLENT FUND
ENCORE! FUND
FAIRBANKS EDUCATION FUND
FAMILIES MATTER UN. CO. JUVE. COURT FUND
DAVID FISHER MEMORIAL SCHOLARSHIP FUND
Fosterfriends Fund
ROBERT M. FOX SCHOLARSHIP FUND
CHARLES W. & MARJORIE GREEN SCHOLARSHIP FUND
JEFFREY "GRIFF" GRIFFITH SCHOLARSHIP FUND
WALTER & DORIS HERD SCHOLARSHIP FUND
LE HERRON RISING LEADERS FUND
HILDRETH ENDOWMENT FUND
COREY HOEHN MEMORIAL SCHOLARSHIP FUND
HOUSTON HOUSE GALLERY 264 FUND
IMPACT 60 FUND
KECKLEY PARK DEVELOPMENT FUND
CITY UNION OF KINGS DAUGHTERS & SONS FUND
G.L. KINGSMORE HALL OF FAME SCHOLARSHIP
KIWANIS SCHOLARSHIP FUNDS (CHAMBERLAIN/MILLS)
WILLIAM LOGAN KREBHENNE MEMORIAL SCHOLARSHIP
DAN B. KYLE SCHOLARSHIP FUND
RYAN J. & KRISTIN K. LEE FAMILY CHARITABLE FUND
LIE FAMILY FUND
LEWIS FAMILY FUND
DR. MALCOLM & BARBARA MACIVOR SCHOL. FUND
MARYSVILLE ART LEAGUE SCHOLARSHIP FUND
MARYSVILLE HOUSING INC. FUND
JASON K. MATHEWSON MEMORIAL SCHOLARSHIP FUND
MCCARTHY & COX CARES COMMUNITY FUND
McELHENY FAMILY FOUNDATION FUND
HE WHO LAUGHS: ISAAC MICHAEL MCMILLAN MENTAL HEALTH FUND
ELIJAH MEADOWS SCHOLARSHIP FUND
MEMORIAL HOSPITAL MEDICAL STAFF SCHOLARSHIP
MHS ALUMNI SCHOLARSHIP FOUNDATION FUND
MHS ATHLETIC HALL OF FAME
MILFORD CENTER PARKS & RECREATION FUND
CONNER ANN MILLER SCHOLARSHIP
TED AND KATRYN MILLER MILLER MEMORIAL FUND
MINTIER VETERAN’S SCHOLARSHIP FUND
JESS & JOSEPHINE MITCHELL FAMILY FOUNDATION
MOOSE LODGE CHARITY & SCHOLARSHIP FUNDS
MOSAIC FUND
NEXT GENERATION INITIATIVE ENDOWMENT FUND
BARBARA & ROGER C. NICOL FUND
PEARL M.J. NICOL & LUCIA A.E. NICOL MEMORIAL FUND
PAT & TOM NUCKLES SCHOLARSHIP FUND
RITA RUBECK PARKER FUND
PATTY PEASE MEMORIAL SCHOLARSHIP FUND
PERRY FAMILY CHARITABLE FUNDS
POTTERTSBURG BRIDGE PRESERVATION FUND
RICHWOOD AREA BUSINESS ASSOCIATION SCHOLARSHIP
RICHWOOD LAKE PARK TRAIL FUND
UNION COUNTY PUBLIC SAFETY SUPPORT GROUP FUND
SCOTTS MIRACLE-GRO FOUNDATION UNION CO. FUND
SEITER FAMILY SCHOLARSHIP FUND
MARILYN SHEARER MEMORIAL SCHOLARSHIP FUND
SILVER SCENE PLAYERS CHARITABLE FUND
SUSAN FINCH SIMPSON MEMORIAL SCHOLARSHIP FUND
LYA SNIDER VOCAL MUSIC SCHOLARSHIP FUND
STOLTE FAMILY FUND
STRITMATTER FAMILY FUND
SUMMER THEATER WORKSHOP SCHOLARSHIP FUND
T & N FAMILY FOUNDATION FUND
JOHN & KANDY TAYLOR COLLEGE BOOK ALLOWANCE FUND
J. CARL & JEANIE THIERGARTNER FAMILY FUND
PLAY LIKE JAY; JAY TRUITT FUND
SCOTT & HOLLY UNDERWOOD FAMILY CULTURAL & EDUCATIONAL
UNION COUNTY COMMON PLEAS COURT DRUG FUND
UNION COUNTY FAIR BOARD FUND
UNION COUNTY FOUNDATION ANCHOR FUND
UNION COUNTY FOUNDATION FOUNDER'S FUND
UNION COUNTY HELPING VETERANS FUND
UNION COUNTY FOUNDATION OPERATING FUND
UNION COUNTY FOUNDATION UNCOMMITTED GRANT FUND
UNION COUNTY YMCA LEGACY FUND
UNITED WAY OF UNION COUNTY LASTING LEGACY FUND
UNITED WAY OF UNION COUNTY RESERVE FUND
URE COOPERATIVE SCHOLARSHIP FUND
VETERANS REMEMBRANCE FUND
GEORGEANN VOLLRATH MEMORIAL FUND
VETERANS REMEMBRANCE FUND
ROY WALLACE B.I.F. MEMORIAL FUND
DAVE & ELIZABETH WARD SCHOLARSHIP FUND
WOUNDED WARRIOR DOGS PROJECT FUND
LAVERNE & JUANITA YODER CHARITABLE FUND
CHARITABLE CHOICES - UCF FUNDS
During calendar year 2019 the Foundation received $1,200,287.01 in charitable contributions and awarded grants of $1,305,626.90*. Of that grant total, more than $225,000 was awarded as scholarships to graduating seniors of Union County high schools, and to special needs youth for summer camp scholarships. Forty-nine grants totaling $68,035 were awarded through our quarterly competitive grant process to local non-profits in 2019.

* Includes individual fund raising expenses

Our investment portfolios are directed and managed by the Union County Foundation’s Investment Committee. Our primary long term strategy is one that uses a conservative asset allocation model consistent with category allocations utilized by community foundations throughout the country as reported by the National Council on Foundations. Our investment strategy minimizes management fees by primarily using index funds for the equity portion of our portfolio. Our allocation model (umbrella portfolio) investment returns: one year 17.75%, three year 12.37%, and five year 8.97%.

The Foundation houses approximately 113 individual named Funds that fall into the five broad category types displayed by this pie chart. Each individual Fund, based on the benefactor’s directive is then invested in either our Asset Allocation Model, Short Term Portfolio, or a combination of the two.
2019 BOARD OF TRUSTEES

David Allen
B.A., Juris Doctorate from The Ohio State University. Retired after 50 years of law practice with Allen, Yurasek, Merklin & Owens-Ruff and predecessors. Active for over 50 years in support of Memorial Health and Union County Foundation and their predecessors. Married to Lynne Bauman Allen. Parent of two children and two grandchildren.

Bruce Daniels
Principal/Owner of Honda Marysville, Honda Motorsports, Toyota Direct, Performance Chrysler, Jeep, Dodge, Ram and Hinkley's Restaurant. Founder of Impact 60. Believes that all business owners & operators should be actively involved with youth and overall human growth development in their local community. Married to Shelby Daniels and the proud parent of 6 children and 1 grandchild.

Cathy Blackford
B.S. from Ohio State University. Retired from 35 year career with The Builders Exchange of Central Ohio, having served 22 years as executive director. Past affiliations: president of Leadership Columbus board of directors, board member Ohio Society of Association Executives, director of The Arlington Bank, member Ohio Union Council, board member O.S.U. Alumni Association Student Loan Foundation, and advisory board Buckeye Leadership Fellows. Recipient of numerous community leadership/service awards.

Judi Green
Lifelong resident of Marysville, MHS class of 64. B.A. Miami University, MA in Teaching and Educational Leadership. Retired from MHS as the At-Risk Coordinator after having worked at O.M. Scotts and Sons Co. as an information specialist and Fairbanks High School as an English, Spanish and speech teacher. Currently tutors in the Homework Help Program at the Hope Center and serves as President of the MHS Alumni Scholarship Selection Board. Judi and her husband David live on their farm north of Marysville.

Chip Hubbs
B.S. and Master of Health Administration Indiana University, fellowship at the Sinai Health System in Chicago. A fellow of the American College of Healthcare Executives, listed by Becker’s Hospital Review of Nonprofit Hospital and Health System CEOs to Know, Columbus Business First’s C-Suite Award Honoree, Union County Business Leader of the Year, Columbus Business First’s “Forty Under 40” and Modern Healthcare Magazine’s Up and Comer Award, delegate to the American Hospital Association’s Regional Policy Board, board member of the Institute for Health Innovation. Past board president Ohio Hospital Association, Fairbanks Board of Education, Union County Chamber of Commerce, and the Union County Family YMCA. Chip is married, has four children, and resides in Marysville.

Gary Lee
Born in Union County, graduate of Marysville High School and O.S.U. Served 16 years as Union County Commissioner. Former president of the State Commissioner’s Association. Has testified “dozens” of times in the Ohio House and Senate. Served as a founding board members and president of the Union County Foundation, Union County Chamber “Lifetime Achievement Award” and UCF honoree. Married to wife Marcia for 50+ years. Assists sons Ryan and Greg on the family farm as well as enjoying their family.

Ryan Mickelson CFP AIF
A CERTIFIED FINANCIAL PLANNER™ with McCarthy & Cox. Previously worked as an Associate Financial Advisor at Ameriprise Financial. He was a National Merit Finalist and graduated from Ball State University with a B.S. in Business Administration. Ryan holds FINRA Series 7 and 66 registrations as well as Ohio life, health, and annuity licenses. He is an Accredited Investment Fiduciary®. Married to Jennifer Morrison, M.D.

Jennifer Morrison, M.D.
Doctor of Medicine degree from St. Louis University, Board-Certified Ophthalmologist from The Ohio State University specializing in the medical and surgical treatment of eye diseases. Six years’ service as Board Chairman and Vice Chair at the former Marysville Ohio Surgical Center (now Memorial Outpatient Surgical Center). Assistant clinical professor at The Ohio State University Department of Ophthalmology. Volunteer at the Columbus Medical Association Free clinic. In private practice in Marysville since 2002. Jennifer and her husband Matt Morrison (Pediatric and Adolescent Medicine) have 4 children.
Roger C. Nicol  
BS and MS in Agricultural Education from The Ohio State University. Retired from 43 year career with Landmark, Countrymark and Land O’Lakes) in Human Resources. Past president of the Ohio Human Resources Council, past president of the Fairbanks Board of Education, a member of the Ohio FFA Foundation and a director for the Ohio Suffolk Sheep Association. Memberships include the Ohio Agricultural Council, the Columbus Maennerchor Club and St. John’s Lutheran church where he has served as elder, vice-president, and secretary. Roger and Barb have two grown daughters, Tami and Amy.

Christiane Schmenk Esq.  
J.D. The Ohio State University Moritz College of Law, B.A. Ohio Northern University. Of Counsel at Bricker & Eckler LLP and President, Argus Growth. Director of the Ohio Development Services Agency; former Mayor of Marysville; former VP for External Affairs for Scotts Miracle-Gro Company; Foundation for Appalachian Ohio Board of Trustees; Women’s Small Business Accelerator; Ohio Northern University Board of Trustees; The Hope Center Marysville Board of Trustees; Past President of Union County Chamber of Commerce; Memorial Hospital Board of Trustees and Marysville Public Library Board of Trustees. Chris and her husband Mike live in Marysville with their two children and attend Marysville Grace Brethren Church.

Alan Seymour  
Retired from 34 year career with Whirlpool Corporate Real Estate, Manufacturing and product engineering. U.S. Navy Veteran. Current Marysville City Councilman, Marysville City Planning & Design Review Boards, Chr. Of Veterans Remembrance Committee, American Legion and Chamber of Commerce. Former United Way board member. Alan and wife Cheri have two daughters and three grandchildren.

R. Mark Stover DO  
Board-certified Orthopedic Surgeon since 1982. During his residency, he completed specialized rotations in total joint surgery and hand surgery. Awarded the title “Fellow” by the American Osteopathic Academy of Orthopedics (AOAO) in 1993. Former President of the AOAO in 2000, Board Member of the AOAO from 1992 through 2001, Medical Staff President of Memorial Hospital, Chairman of the Department of Surgery at Memorial Hospital, Member of the Medical Executive Committee at Memorial Hospital, Chairman of the Credentials Committee at Memorial Hospital, and Chairman and Residency Program Director of the Department of Orthopedics at Doctor’s Hospital. Member of the medical staff of Memorial Hospital.

Holly Underwood  
Licensed Funeral Director and co-owner of Underwood Funeral Home. Graduated from OSU where she served in numerous leadership positions including president of the Ohio Staters. Post college Holly worked in medical sales and was a marketing specialist. She is an elder of the First Presbyterian Church of Marysville where she enjoys

James R. Vandre RICP  
Jim has been in the financial services industry since 1994. He is a Retirement Income Certified Professional and currently is affiliated with Eagle Strategies, LLC and New York Life. He started his career in 1994 with Aid Association for Lutherans. Jim also served as the Chairman of the Planned Gifts Committee with Memorial Hospital’s Development Council. Jim is married to Marlene and has three grown children, along with 4 grandchildren. Jim and Marlene are members of St. John’s Lutheran Church in Marysville, OH. Jim is also a member of Kiwanis.

Ronald Zimmerly  
Ron graduated from The Ohio State University with a Bachelor of Science degree in Agriculture Economics, with a specialization in Finance. He is a twenty-three year veteran of the banking industry, and is currently serving as President and CEO of Liberty National Bank. He currently serves on the Board of the Hardin County Economic Development Council, Discovery Riders Board of Directors is past chairman for the Hardin County Chamber and Business Alliance. Ron, his wife Kelli and their family reside in Bellefontaine.
Grants from the Union County Foundation Unrestricted Grant Fund:
The following grants were awarded through our grant application process:

- United Way of Union County: $6,000.00
- Bridges Community Action Partnership: $2,500.00
- Girls on the Run of Central Ohio: $2,500.00
- Wings Support & Recovery: $1,500.00
- Simon Kenton Council Boy Scouts of America: $1,000.00
- Families Matter: $1,500.00
- Union County Personal Needs Pantry: $1,500.00
- MAA Trackbackers: $200.00
- Richwood Independent Fair: $150.00
- American Legion Auxiliary: $825.00
- Union County Chamber Covered Bridge Festival: $2,000.00
- Veterans Remembrance Fund: $500.00
- Union County Neighbor to Neighbor: $960.00
- Young Entrepreneurs Academy: $1,000.00
- Girl Scouts of Ohio’s Heartland: $500.00
- United Way of Un. Co. Dolly Parton Library: $2,000.00
- Union County Community Concerts: $500.00
- Daily Needs Assistance: $1,500.00
- Marysville High School Mock Trial: $500.00
- Fairbanks High School Mock Trial: $500.00
- North Union High School Mock Trial: $500.00
- Marysville Schools: $1,000.00
- Plain City Food Pantry: $1,000.00
- Richwood Jr. Fair Livestock Sale: $1,400.00
- Union County Jr. Fair Livestock Sale: $1,200.00
- Community Thanksgiving Dinner: $2,500.00
- Care Train of Union County: $2,000.00
- Fairbanks FCCLA: $1,500.00

**TOTAL UNRESTRICTED GRANTS**

$38,235.00

Restricted Grants and Scholarships
from Donor Advised, Scholarship Funds, Gift Annuities, and Remainder Trusts:
The following grants and scholarships were awarded based on specific direction from Fund Advisors and selection committees' processes:

- Charles Andrew Baesmann II Memorial Fund: $565.00
- Biehl Humanities Scholarship: $500.00
- Burnside/Imbody Scholarship Fund (7 scholarships): $8,000.00

continued....
Grants from Donor Advised & Scholarship Funds continued:

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<th>Scholarship Fund Name</th>
<th>Grants/Scholarships</th>
<th>Amount</th>
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<tr>
<td>Hildreth Endowment Fund</td>
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<tr>
<td>Corey Hoehn Memorial Scholarship Fund</td>
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<td>Impact 60 Fund</td>
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<td>G.L. Kingsmore Hall of Fame Scholarship Fund</td>
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<td>City Union of King’s Daughters and Sons Fund</td>
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<td>Kiwanis Scholarship Funds-Chamberlain/Mills</td>
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<td>William Logan Krebehenne Scholarship Fund</td>
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<td>Dan B. Kyle Scholarship Fund</td>
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<td>Lee Family Fund</td>
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<tr>
<td>Lewis Family Fund</td>
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<td>Dr. Malcolm &amp; Barbara MacIvor Memorial Scholarship Fund</td>
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<tr>
<td>McCarthy &amp; Cox Cares Community Fund</td>
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<td>McElheny Foundation Fund</td>
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<td>Marysville Housing</td>
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<td>Marysville Moose Lodge Charity Fund</td>
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<td>Marysville Moose Scholarship Fund</td>
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<tr>
<td>Jason K. Mathewson Memorial Scholarship Fund</td>
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<td>$1,000.00</td>
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<tr>
<td>Memorial Hospital Medical Staff Scholarship Fund</td>
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<tr>
<td>M.H.S. Alumni Scholarship Fund</td>
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<td>M.H.S. Athletic Hall of Fame Foundation Fund</td>
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<td>Conner Ann Miller Scholarship</td>
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<td>Ted &amp; Kathryn Miller Memorial Fund</td>
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<td>Mintier Veteran’s Scholarship Fund</td>
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<td>Jess Mitchell Family Fund</td>
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<td>$1,500.00</td>
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<tr>
<td>Mosaic Fund</td>
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<tr>
<td>Next Generation Initiative Fund</td>
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<td>$70,971.37</td>
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</tbody>
</table>
2019 GRANT DISTRIBUTIONS . . . continued

Grants from Donor Advised & Scholarship Funds continued:

Jake Nickle Gridiron Fund $ 500.00
Pat & Tom Nuckles Scholarship Fund (6 scholarships) $ 6,000.00
Rita Rubeck Parker Scholarship Fund (3 scholarships) $ 3,000.00
Patty Pease Memorial Scholarship $ 500.00
George Perry Family Funds (6 grants) $ 30,665.70
Play Like Jay: Jay Truitt Fund $ 100.00
Richwood Area Business Association Scholarship Fund (2 scholarships) $ 1,000.00
Rotary Club of Union County Fund $ 5,020.54
Scotts Miracle-Gro Foundation Union County Fund (11 grants) $ 10,250.00
Silver Scene Players Fund (12 grants) $ 8,361.81
Susan Finch Simpson Memorial Scholarship Fund (1 scholarship) $ 1,500.00
Lya Snider Scholarship $ 1,000.00
Stolte Excellence in Leadership Scholarship Fund $ 23,852.81
Stritmatter Family Fund $ 5,000.00
Summer Theater Workshop Scholarship $ 500.00
T & N Family Foundation (11 grants) $ 11,000.00
John & Kandy Taylor College Book Allowance Fund $ 200.00
Underwood Cultural & Educational Fund (10 grants) $ 11,586.96
Union County Common Pleas Drug Court Fund (4 grants) $ 800.00
Union Rural Electric Cooperative $ 4,500.00
Veterans Remembrance Fund (10 grants) $ 54,402.50
Georgeann & Gene Vollrath Memorial Fund (2 grants) $ 1,500.00
Roy Wallace BIF Scholarship Fund (3 scholarships) $ 3,325.00
Dave & Elizabeth Ward Scholarship Fund (2 scholarships) $ 1,000.00
Wounded Warrior Dogs Project (3 grants) $ 2,025.12
Laverne & Juanita Yoder Charitable Fund (17 grants) $ 29,800.00

TOTAL RESTRICTED GRANTS & SCHOLARSHIPS $ 1,267,391.90
TOTAL 2019 UNRESTRICTED, RESTRICTED & SCHOLARSHIPS $ 1,305,626.90
Andrew Daum
Memorial Soccer Scholarship
Madison Shumway
Bowling Green University
Nicholas Bautsh
Ohio State University

Bob & Eula Jean Davis Scholarship
Audra Adams
Ohio State University
Gabriel Burggraf
Ohio State University

DB Kyle Scholarship
Mackenzie Lee
Ohio State University
Josie Duncan
Ashland University
Gabriel Burggraf
Ohio State University

DB Kyle Scholarship
Dylan Thompson
Heidelberg University
Tyler Smith
Urbana University
Samantha Picklesimer
BGSU
Josi Wolf
Defiance College

Burnside/Imbody/Fish Memorial Scholarship
Cole Petterson
Ohio Wesleyan University
Zachary Kratowicz
Ohio Northern University
Dalton Skaggs
Ohio State University

Burnside Imbody Fish Memorial Scholarship
Joseph Blair
Bowling Green State University
Gabriel Burggraf
Ohio State University
Gavin Zwayer
Ohio State University
Logan Suiter
Ohio Northern University

Darla-Hall Barrett Memorial Scholarship
Madeline Weisburn
Walsh University
Kate White
University of Kentucky

Dave & Elizabeth Ward Memorial Scholarships
Joshua Zweizig
Bowling Green State University
Kayden Cordell
Bluffton University

Ben & Mary Coleman Scholarship
Blake Kessler
OSU ATI
Grant Kessler
OSU ATI
Kierstan Diaz
Columbus State Community College
Austin Becker
Ohio State University

Charles & Marjorie Green Memorial Scholarship
Michaela Stauffer
Marion Technical College
Grant Kessler
OSU ATI
Blake Kessler
OSU ATI
2019 Scholarship Recipients . . .

Dr. Malcolm & Barbara Maclvor Memorial Scholarship

Benjamin Warden
Ohio Wesleyan

Katrina Strayton
Rensselaer Polytechnic

Mackenzie Shelton
Ohio State University

Emma Rohrs
Ohio State University

Virginia Rose Whalen
Ohio State

Madison Powers
Mt. Vernon Nazarene University

MHS Alumni Scholarship Foundation

Robert Henderson Scholarship

Robert & Joan Deaton Scholarship

Pat Conlon Memorial Scholarship

Mintier Veteran's Scholarship

DeGroot Family Scholarship

Jason Mathewson Memorial Scholarship

G.L. Kingsmore Hall of Fame Scholarship

Corey Hoehn Memorial Scholarship

Addyson Miller-Brown
Ohio Dominican University

Paiten Riley
Miami University

Andrew Beverlin
University of Cincinnati

Tyler Connolly
West Virginia University

Emily Daniel
Wright State University

Walker Heard
West Virginia University
2019 Scholarship Recipients . . .

Robert M. Fox & William Logan Krebehenne Scholarships

Audra Adams
Ohio State University

Ciera Madison
Ohio Northern University

Myah Rose
West Virginia University

Chase Cutarelli
Columbia University

David Fisher Scholarship

Summer Theatre Workshop Scholarship

Patricia Biehl Scholarship

Jason K. Mathewson Memorial

Rita Rubeck Parker Scholarship

Sargent Chamberlain & Charles Mills Kiwanis Scholarships

Daniels Hinkley, Impact 60 Community Service Award

Walter/Doris Herd Ag. Scholarship

Patty Pease Memorial

Richwood Area Business Association Scholarship

Emily Daniel
Wright State University

Kate White
University of Kentucky

Samantha Picklesimer
BGSU

Blake Storr
Indiana Wesleyan University

Danielle Jarvi
Bowling Green State University

Paiten Riley
Miami University

Kate White
University of Kentucky

Corinne Lee
Ohio State University

Samantha Picklesimer
Bowling Green State University

Kaitlyn O’Connors
OSU Marion

Nick Reeder
Kent State University
2019 Scholarship Recipients . . .

Memorial Hospital Medical Staff Scholarship

Jacob Nicol
Wright State University

Emily Daniel
Wright State University

Paiten Riley
Miami University

LeAnna Dunn
University of Northwestern Ohio

Larry & Jan Dunn Scholarship

Elizabeth Sharrock
Mt. Vernon Nazarene University

Kaitlyn O’Connors
OSU Marion

Kayden Cordell
Bluffton University

Connor Ann Miller
Scholarship

Audra Adams
Ohio State University

Pat & Tom Nuckles Scholarship

Savannah Sparks
Mt. Vernon Nazarene University

Lindsey Itnyre
Bowling Green State University

Ashley Boggs
Bowling Green State University

Haley Isaacs
Mt. Vernon Nazarene University
The VMW Legacy Society consists of individuals, families and businesses who support the Union County Foundation’s mission and vision through a generous financial gift to the Foundation's Unrestricted Endowment Fund. The gift may be given now, over a period of years, or at the end of a lifetime. To offer our gratitude, the names will also be displayed permanently in the Foundation Office on our Wall of Honor.

**VISIONARY**

$100,000 AND ABOVE

- Richard & Laura Bump
- Dr. John & Jesebel Linscott
- Pat Nuckles, George Perry

**PRESERVATIONIST**

$50,000 TO $99,999

**BUILDER**

$10,000 TO $49,999

- David & Ann Allen
- David Anderson
- Dr. Mary & Dr. David Applegate
- Daniel & Melanie Behrens
- Ken Boehn
- Charles & Jane Berger
- Jerry & Cissy Born
- Robert & Joyce Buckley
- Gary & Nancy Conklin
- Robert & Luella Conklin
- Phillip & Sarah Connolly
- Jim & Faye Cox
- Robin & Joseph Craft
- Gerald & Marge Dackin
- Dick Douglass
- Robert & Helen Evans
- John & Charlotte Eufinger
- J. Daniel & Becky Fitzgerald
- Don Fraser
- Myron & Priscilla Gallogly
- Judy & David Green
- Mardy Hanlon-Stolte
- F. Leon & Betty Herron
- Chad & Jodi Hoffman
- Nancy & Rick Hoffman
- Debra & Glenn Hochstetler
- Todd & Amy Hoge
- Barbara & Dr. William Holcomb
- Christina & John Horan
- Kevin & Kristin Kern
- Gary & Marcia Lee
- Robert & Nancy Lewis
- Dr. Malcolm & Barbara MacIvor
- Thomas & Amy McCarthy
- McCarthy & Cox Retirement & Estate Specialists, LLC
- Frank & Cheryl Miller
- Carolyn & Jim Mitchell
- Joseph & Janet Mitchell
- Dorothy Mudgett
- Roger C. & Barbara Nicol
- Carroll & Shirley Ormeroid
- Dr. Frank & Ruth Ann Raymond
- Herb & Priscilla Richardson
- Andy & Sandy Ross
- Greg & Kathleen Sehnert
- The Scotts Company
- Ron Seiffert & Delaware Co. Bank
- Alan & Cheri Seymour
- Jeffery & Barbara Swartz
- Barbara & Jerry Timmons
- Dr. Victor & Susan Trianfo
- Holly Underwood
- Jim & Marlene Vandre
- David & Jane Vollrath
- Carol Young

**PATHMAKER** $1,000 TO $9,999

- Dr. Charlotte Agnone
- Cathy Blackford
- Jenny & Brian Brill
- Bob & Carol Curtiss
- Bruce Daniels
- Steve & Sue Devine
- Walt & Verna Griese
- Eugene & Ruth Ann Mayer
- Memorial Health of Union County
- Ryan Mickelson
- Dr. Jennifer Morrison
- Christiane & Michael Schmenk
- Stephen Simms
- Page & Cheryl Vornbrock
- Ronald Zimmerly & Liberty National Bank