

# THE BASICS



October, 2002

As we indulge in our annual retrospective appraisal, this year many of us are rightfully horrified about the change in our world. The convenience of our lives in the North Country has changed. It is more difficult to visit Canada. A trip through an airport is considerably slower. And we are the lucky ones, those who did not lose a loved one or acquaintance when American freedom was challenged by terrorists.

We worry about our neighbors at Fort Drum who spent most of the last year in the chilling cold and the searing heat of Afghanistan seeking out terrorists whose simple goal is to disrupt our freedom.

As we fret we should rejoice in the blessings the North Country bestows on each of us. We are privileged to live in the North Country, the home for so many people who care enough to alleviate suffering and to find means to improve the lives of neighbors. Our community is blessed with a challenging and rewarding environment. We are home to educators and health care systems which work.

We have the Northern New York Community Foundation and its philanthropic leadership. Again last year the Foundation provided its customary support to college students seeking financial aid. Foundation gifts improved the cultural diversity of Watertown and so many of the smaller communities which provide the North Country its special high quality of life.

But most important the Foundation responded to a sudden explosion in demand for basic needs. As the nation struggled to move forward, Northern New York support groups were challenged to meet the basic needs of clothing and food. The Foundation responded with immediate grants to alleviate suffering.

Further, the Foundation developed a special allocation of funds to encourage the development of innovative programs to solve community challenges of human need. Grants have been awarded. Now we watch and hope for success.

The Northern New York Community Foundation plays a major role in the health of the North Country psyche, providing grants and support. However, the Foundation itself is not immune to pain. Its assets are stagnant in the face of national economic distress, but its resolve is firm. Our priority is simple — supply all the aid we can to make the North Country an even better place to live.



*John B. Johnson, Jr.*

M E E T I N G  
B A S I C  
N E E D S

# THE BASICS



*To meet the increasing demands for adequate housing, the Foundation gave a grant of \$30,000 to the North Country Affordable Housing Corporation to establish a fund to provide assistance to low income households. This “fund of last resort” was applied in conjunction with the Mobile Home Replacement Program and the First Time Homebuyers program to cover unmet costs.*



## 2001 Grants from UNRESTRICTED FUNDS

<b>Antique Boat Museum</b>	
To develop a visual master plan for Clayton waterfront	\$ 5,000
Foundation challenge for campaign for Haxall building	200,000
<b>Army Community Service - Fort Drum</b>	
To help with basic human needs	5,000
<b>B.O.C.E.S.</b>	
Craftsman awards at Watertown and Glenfield Centers	1,500
<b>Canine Working Companions</b>	
Community outreach and education	5,000
<b>Catholic Charities</b>	
Help with basic human needs in Jefferson and Lewis Counties	5,000
<b>Clarkson Horizons Program</b>	
Scholarships for 7 <sup>th</sup> and 8 <sup>th</sup> grade girls summer program	5,000
<b>Council on Foundations</b>	
Membership	2,150
<b>Disabled Persons Action Organization</b>	
To furnish Lewis County respite home	18,936
Help with basic human needs in Jefferson and Lewis Counties	5,000
<b>Food Bank of Central New York</b>	
To help stock food pantries in Jefferson and Lewis Counties and the Village of Canton	20,000
<b>Historical Association of South Jefferson</b>	
To purchase a microfilm reader-printer	3,000
<b>Hospice of Jefferson County, Beacon Program</b>	
Conference on loss and bereavement	1,304
<b>Jefferson Community College</b>	
To expand library's regional historical archives	10,000
<b>Jefferson Rehabilitation Center</b>	
Staff training in behavioral analysis	2,672
<b>Lewis County Community Mental Health Center</b>	
Scholarships for fall conference	2,600
<b>Lewis County Opportunities</b>	
Help with basic human needs in Lewis County	7,000
<b>Mountain View Prevention Services</b>	
To fund an additional counselor for 1-year student assistant program	20,000
<b>North Jefferson Community Theater</b>	
To purchase stage lighting for new building	4,450
<b>North Country Affordable Housing</b>	
To establish a "Make it Happen" fund	30,000
<b>North Country Children's Clinic</b>	
Boots and winter coats for children in Jefferson and Lewis Counties	6,500
<b>North Country Prenatal/Perinatal Council</b>	
Scholarships for training breastfeeding educators	2,000
<b>Northern Choral Society</b>	
For their concert series	1,500
<b>Northern New York Community Foundation Scholarships</b>	
Support for student scholarships in all disciplines	125,112
<b>Ontario Bays Initiative</b>	
To conduct a workshop on stone house history and repair	1,200

# THE BASICS



## FOOD



*During 2001, the Foundation made grants to the following not-for-profit groups to insure that they could supply food to those in need:*

- *\$20,000 to the Food Bank of Central New York to provide over \$280,000 worth of food for food pantries in Jefferson and Lewis Counties and the village of Canton.*
- *\$7,000 to Lewis County Opportunities for food distributions.*
- *\$10,000 to the Salvation Army to support the operation of their soup kitchen.*



## 2001 Grants from UNRESTRICTED FUNDS

<b>Orchestra of Northern New York</b>	
To fund a concert at Operation Lowville's Festival of the Arts	2,000
<b>Snow Belt Housing</b>	
Training program for lead safe practices	12,403
<b>SUNY Potsdam</b>	
Scholarships for Summer Music Program	5,000
<b>Syracuse Symphony Orchestra</b>	
Summer concert in Thompson Park	6,000
<b>The Nature Conservancy</b>	
Purchase property adjacent to Chaumont Barrens Preserve	5,000
<b>The Salvation Army</b>	
To help with the soup kitchen in Jefferson County	10,000
<b>Thousand Islands Museum, Inc.</b>	
Equipment, displays and renovations at new location	6,343
<b>Tug Hill Tomorrow Land Trust</b>	
For heritage celebration and concert	5,000
<b>Village of Carthage</b>	
To construct an in-line skating and skateboard park	5,000
<b>Village of Lowville</b>	
To renovate the soldiers' monument	20,000
<b>Watertown Urban Mission</b>	
To help with prescriptions	7,000
<b>Total</b>	<b>\$573,670</b>

## THE BASICS



## FOOD

- *\$17,500 to the town of Champion to relocate and restock the Carthage food pantry after the tragic fire in March.*

# THE BASICS



## Making a Gift to the Foundation

*The Northern New York Community Foundation, Inc. serves many donors with a variety of charitable interests. Gifts are tax-deductible and may be made during the donor's lifetime or by bequest in a will.*

**Bequests** - A donor designates that the Foundation is to receive a specific amount, a percent of the estate or a piece of property.

**Life Income Gifts** - A donor makes a gift to the Foundation, in return for which he or she receives income for life.

**Gift Annuity** - In exchange for a gift of cash or securities, a donor receives a guaranteed annual payment for life. When the annuity terminates a permanent endowment fund is established in the donor's name. This fund may be used to support a local charitable organization.

**Outright Gifts** - Gifts made during a donor's lifetime can take the following forms:

*Friends of the Foundation Fund* - Provides an opportunity for the donor to make a contribution to the annual operation of the Foundation's programs, or to make periodic contributions to the Foundation's endowment in a fund named after the donor or his or her family, or in memory of a loved one.

*Unrestricted Fund* - To be used as the board deems necessary.

*Designated Fund* - Allows the donor to restrict payment to named charitable agencies or projects.

*Advised Fund* - Allows the donor to make tax-deductible gifts to the Foundation and to make suggestions to the board of directors for the philanthropic use of the fund.

## 2001 Grants from ADVISED FUNDS

*Grants of \$100 or more include:*

Antique Boat Museum	\$ 12,500
Association for the Blind & Visually Impaired	250
CAVA Crisis & Counseling Center	500
Children's Home of Jefferson County	100
Clarkson University	21,000
Clayton Council of Churches Food Pantry	500
Community Performance Series	100
Fire Departments: <i>Carthage, Castorland, Lowville, West Carthage</i>	2,000
Frederic Remington Art Museum	6,000
Friends of Hawn Memorial Library	5,000
Grindstone Island Research & Heritage Center School	500
Henderson Free Library	1,000
Hospice of Jefferson County	400
Jeff-Lewis Mediation Center	300
Jefferson Community College Foundation	2,450
Jefferson County Historical Society	150
LaFargeville Central School	300
Literacy Volunteers	1,000
Lowville Academy & Central School	200
Macsherry Library	35,097
North Country Children's Clinic	3,300
North Country Public Radio	1,000
Planned Parenthood of Northern New York	100
Samaritan Foundation of Northern New York	17,650
Sci-Tech Center	1,000
St. Lawrence Advantage Program	1,000
St. Lawrence University	5,000
Syracuse Symphony Orchestra	565
The American Handweaving Museum & Arts Center	2,100
The Hiawatha Boy Scout Council	375
The Nature Conservancy	200
The Rotary Foundation	100
The Salvation Army	100
Thompson Park Conservancy	34,200
Thousand Islands Land Trust	5,000
United Way of Northern New York	13,800
Volunteer Center of Jefferson County	400
Watertown Family YMCA	15,819
Watertown Urban Mission	3,700
WPBS-TV	2,640
WRVO Public Radio	150
<b>Total Funds Expended</b>	<b>\$202,090</b>



# THE BASICS



## CLOTHING



*In December of 2001, the Foundation awarded grants to the North Country Children's Clinic and the Disabled Persons Action Organization that resulted in the purchase of winter clothing for 195 children.*

## 2001 Grants from RESTRICTED FUNDS

<b>Walter S. Atkinson Fund</b>	
For capital campaign to improve facilities at Samaritan Medical Center	\$ 720
To support services of United Way of Northern New York in Jefferson County	720
<b>Maurice D. Barnette Scholarship Fund</b>	
Scholarship for Watertown High School	450
<b>Julie Bettinger Memorial Scholarship Fund</b>	
Scholarships for Belleville-Henderson and South Jefferson Central Schools	820
<b>Bicentennial Tree Fund</b>	
To replant tree at Case Middle School	1,000
To plant trees in Watertown	2,094
<b>Black River Community Corporation Cox Scholarship</b>	
Scholarship for recipient from Towns of Rutland, LeRay, Pamelia, or Village of Black River	950
<b>Robert F. Breeze Scholarship Fund</b>	
Scholarships for Lowville Academy & Central School	17,750
<b>Charles Campbell Scholarship Fund</b>	
Scholarship for 2nd year technical student at Clarkson University	2,100
<b>Doris E. Carleton Fund</b>	
Scholarships in all disciplines	19,684
<b>Jennifer Corbett Rainbow Scholarship Fund</b>	
Scholarships for Watertown High School	1,300
<b>Delos M. Cosgrove Fund</b>	
Nursing scholarships	2,428
<b>Leon A. Davis Scholarship Fund</b>	
Scholarships for Lowville Academy & Central School	3,050
<b>Glenn S. Doull Scholarship Fund</b>	
Scholarship for Watertown High School	700
<b>Carl H. Frink Scholarship Fund</b>	
Scholarships for Thousand Islands Central School	3,100
<b>Greenizen Scholarship Fund</b>	
Teaching scholarship for Thousand Islands Central School	2,500
<b>Gladys Hart Fund</b>	
To support Big Brothers/Big Sisters	280
<b>Herring College Memorial Fund</b>	
Scholarships in engineering, science and related technical fields	90,000
To support Hay Memorial Library	10,000
To expand Jefferson Community College Library's regional historical archives	10,000
<b>Gary M. Jones Memorial Fund</b>	
Scholarships for Watertown High School	3,700
<b>Marie C. and Ralph J. Marilley Scholarship Fund</b>	
Scholarships for Beaver River Central School	5,333

# THE BASICS



## CLOTHING



Joseph L. Rich, Executive Director of DPAO, expressed his appreciation: *“The Foundation’s sense of caring was truly evident...in the effort to assist families in the purchase of winter clothing, thus helping them cope with the stress resulting from lack of income due to unemployment, a below average economy, or just unexpected emergency situations.”*



## 2001 Grants from RESTRICTED FUNDS (cont.)

<b>Mary Alice and Joseph B. Meichelbeck Fund</b>	
Scholarship for Watertown High School	500
<b>Alfred and Frances Paige Scholarship</b>	
Scholarships for Watertown High School	1,100
<b>Rose A. Petrie Fund</b>	
Scholarships in all disciplines	7,212
<b>Harriet L. Pruyn Trust</b>	
For capital campaign to improve facilities at Samaritan Medical Center	5,636
To support services of United Way of Northern New York in Jefferson County	5,650
<b>Harriet L. Pruyn (Clause 15) Fund</b>	
To support services of United Way of Northern New York in Jefferson County	1,340
<b>Reinman Family Fund</b>	
Clayton Improvement Association for Paynter Senior Center	5,000
<b>Colleen St. Pierre Scholarship Fund</b>	
Scholarship for Watertown High School	900
<b>Harvey Simon Scholarship Fund</b>	
Scholarships for Watertown High School	600
<b>DeForest H. and Marion P. Smith Fund</b>	
To support services of Hospice of Jefferson County	6,400
<b>Syracuse Symphony Fund</b>	
To support concert series in Watertown	24,547
<b>The Nature Conservancy Fund</b>	
To support conservation activities	2,600
<b>United Way of Northern New York Fund</b>	
To support services	10,900
<b>Visiting Nurse Association Fund</b>	
Scholarships in nursing and related health fields	26,000
<b>Watertown Morning Musicales Scholarship Fund</b>	
Scholarships for students pursuing music careers	2,150
<b>Cecile T. Williams Memorial Fund</b>	
Scholarships for General Brown Central School	7,500
<b>Total</b>	<b>\$286,814</b>

# THE BASICS



TRANSPORTATION

*The Wheels to Work program provides donated vehicles to low-income individuals who need transportation to work. Due to an unforeseen emergency, the Watertown Urban Mission, the program's sponsor, lost their maintenance facility. A grant from the Foundation allowed them to purchase a lift for the new facility so that repairs and the program could continue.*

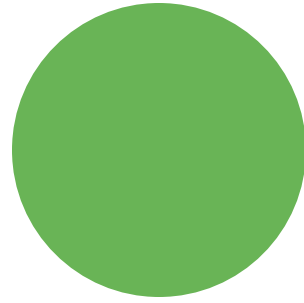


## LEGACY and MEMORIAL FUNDS

*The Foundation's principal growth since 1929 has come from legacies. These sums of money have been made part of the Foundation's endowment or placed in trust for the Foundation. Each year the Foundation also receives memorial gifts in honor of a friend or relative. The persons listed below have made bequests to the Foundation or have had contributions made in their memory.*

Helen H. Adams	Carl H. Frink	Mildred A. Phillips
Walter S. Atkinson	Mary S. Goodale	Mary K. Plunkett
Mary S. Ayers	Judith Cohen Gordon	Francis C. Pressaw
Ross W. Barker	Ernest and Emma Halley	Harriet L. Pruyn
Mabel E. Barnette	Harold Halley	Robert W. Purcell
Gretta L. Barron	Robert J. Hanrahan	Colleen St. Pierre
Julie L. Bettinger	Betty Louise Haviland	Ella Savage
Robert F. Breeze	William P. Herring	Evelyn M. Shafer
Paul E. Brown	James W. Higgins	Harvey Simon
Lila Bull	Claire C. Hogan	DeForest H. Smith
Charles A. Campbell	Clare M. Holton	Marion P. Smith
Doris E. Carleton	Robert G. Horr, Jr.	Susan B. Stone
Mary E. Carnes	Nellie M. Horton	Josephine C. Taggart
William B. and Frances P. Carter	Henry A. Hudson	Edith S. Valentine
Minnie F. Clark	John B. Johnson	Visiting Nurse Association
Charlie Close	Julia G.E. Johnston	Christopher P. Waite
Elliot Cohen	Gary M. Jones	Madge R. Wardwell
Blanche J. Comstock	Ralph LaClair	Harold J. Wight
Jennifer M. Corbett	Evelyn T. Kelsey	Cecile T. Williams
Luella F. Cornwell	Lucy E. Kendrew	John R. Willmott
Delos M. Cosgrove	David C. Knowlton	Elizabeth A. Wise
Earle M. Crysler	Clara G. Learned	Joanne Wise
Joan L. Davis	Ralph and Marie Marilley	
Leon A. Davis	John F. Marsellus	
Robert L. Deery	James McVean	
John W. Dillenback	DeWitt C. Middleton	
Pauline H. Dillenback	Wilna Natali	
Glenn S. Doull	Thelma C. Ottersland	
Harlow G. Farmer	Alfred and Frances Paige	
Erwin S. Focht	Henry R. Peck	
	Rose A. Petrie	

# THE BASICS



## North Country Children's Clinic - Dental Clinic in Lowville

*In 2001, 905 Lewis  
County children made  
3,204 visits to the North  
Country Children's Clinic  
in Lowville. The startup  
of the clinic was funded,  
in part, by  
a grant of  
\$30,000  
from the  
Foundation.*



# MEMORIAL FUNDS

*Each year the Foundation receives memorial contributions in honor of friends and relatives. Funds have been received in memory of the following:*

## **Julie L. Bettinger Scholarship**

Jeffrey and Kimberly Taylor

## **Betty Conde**

Dr. David M. Stabins

## **Jennifer Corbett Scholarship**

Maggie Rizer

## **Margaret N. Cosgrove**

Alta Partners – Guy Nohra and Eugene Chen

John H. Arnold, MD

Dr. and Mrs. Floyd Bajjaly

Dr. Wilfred G. Bigelow

Mr. and Mrs. Claude C. Charlebois

Cleveland Clinic Foundation –

Staff of the Dept. of Cardiothoracic  
Anesthesia

Dept. of Thoracic & Cardiovascular Surgery

Thoracic & Cardiovascular Surgery

Residents & Fellows

Gina M. Cronin, Mary Curran and  
Donna Zabell

Cleveland Clinic Health System

Dr. and Mrs. Lawrence H. Cohn

Nancy Young Duncan

Edwards Lifesciences –

Michael A. Mussallem and Anita B. Bessler

Edwards Lifesciences Employees

Fawzy G. Estafanous, MD

Dr. and Mrs. James B. Fish

Mr. and Mrs. Everett G. Foster

Vera Fuller

Dr. and Mrs. Inderjit S. Gill

Julie H. Jordan and Paul H. Jordan, Jr.

John C. MacFarlane

Mr. and Mrs. William T. Maloney

Mr. and Mrs. William W. Miner

Viggo Mortensen

Mr. and Mrs. Leon W. Quick

Elizabeth A. Rice

Barbara D. Willmott

Mr. and Mrs. Henry H. Willmott

Worldcare International, Inc.

Mr. and Mrs. W. Graham Wright

## **Catherine Dallas**

Anderson Wise

## **Duane and Doug Dittman**

Virginia S. Dittman

## **Glenn S. Doull Scholarship**

### **Maxine S. Newstead Memorial**

Case Junior Retirees

### **Frank Thomas Memorial**

Case Junior Retirees

### **Barbara Traynor Memorial**

Case Junior Retirees

## **John B. Johnson**

Adirondack Publishing Co., Inc.

Amtek Management Services Corp.

Arthur Andersen LLP

Mr. and Mrs. Donald C. Andrus

Bruce and Holly Armstrong

Mr. and Mrs. H. Douglas Barclay

Larry and Jamie Bashford

Batavia Newspapers Corp. Employees

Mr. and Mrs. Joseph Batterson

Bernier Carr and Associates, PC

Bond, Schoeneck and King, LLP

Liana Brooks and City of Yonkers Co-workers

Elizabeth Brown

CIGNA Retirement and Investment Services

Donald and Catherine Cole

Jon P. Constance

Mr. and Mrs. Robert C. Cornell

Margaret N. Cosgrove

Lloyd B. Cox

Mr. and Mrs. Raymond Cramer

CREG Systems Corp.

Philippe de Bausset

Derouin's Plumbing and Heating

Mr. and Mrs. Dominic Doldo and Family

John Doldo, Jr.

John Doldo, III

Mr. and Mrs. George M. Ewing

Theodore and Elizabeth Fibison

Dr. and Mrs. James B. Fish

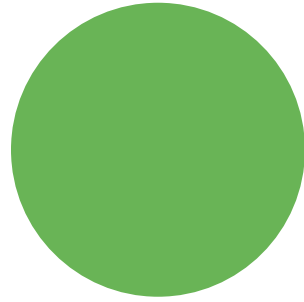
Mr. and Mrs. Everett G. Foster

Dean Fuller

Russell and Teresa Gallup



# THE BASICS



## The Paynter Senior Center

*The Paynter Senior Center in the village of Clayton needed a larger, more modern, easily accessible facility. The Foundation provided ongoing technical assistance and a grant of \$55,000 to equip a new kitchen in the beautiful new building that was constructed by the Clayton Housing Authority.*



**John B. Johnson** (continued)

Albert E. Gault  
Mr. and Mrs. Michael J. Geiss  
Gail Hill Gordon  
Jeffrey E. Graham  
Jane R. Heffron and Kevin Heffron  
Mr. and Mrs. Earle T. Holsapple, Jr.  
Hudson Valley Newspapers Employees  
Italian American Civic Association  
Jefferson County Historical Society  
Elizabeth M. Johnson  
Ann Johnson-Kaiser  
Mr. and Mrs. Robert H. Kaiser  
James R. Kanik  
F. Anthony Keating  
KeyBank NA  
Joyce H. Laidlaw and Donald A. Laidlaw  
David Larrabee  
Donald E. Lawton  
W. J. MacDonald  
Mr. and Mrs. Richard R. Macsherry  
Mr. and Mrs. Ralph Marcellus  
Sharon J. Marosek  
Marsellus Family  
Mr. and Mrs. Thomas Martello  
Hope R. Metcalf  
Louis Mihalyi  
Mr. and Mrs. Tony Morgia  
Burr W. Morris  
Clark Morrison 3<sup>rd</sup>  
New York Times News Service  
Jim and Martha O'Donnell  
Thomas H. O'Neill, Jr.  
Carmen A. Palumbo  
Vera C. Parmiter  
Don and Wannetah Pitz  
Poughkeepsie Journal  
Laurie Putney  
Mary C. Rea  
Dr. and Mrs. Eugene Renzi  
Elizabeth A. Rice  
Brent J. Richardson  
Mr. and Mrs. Stephen A. Rogers  
Michael and Jacquelyn Schell  
Wayne and Patricia Schreck  
Dr. David M. Stabins  
St. Lawrence County Newspapers  
Julia S. Stokes  
Thousand Islands Bridge Authority  
Thousand Islands Printing Co., Inc.  
Mr. and Mrs. William Roy  
Mr. and Mrs. C. Richard Snow  
David and Rebecca Tinker

Lois Tufo  
Thomas R. Turnbull  
Twin Trees Foundation  
Peter and Becky Van de Water  
Alex Velto  
Mr. and Mrs. Loren W. Walts  
Watertown Daily Times Employees  
Mr. and Mrs. Donald C. Whiteman  
Russell Wilcox  
Mr. and Mrs. Henry Willmott  
Anderson Wise  
Mr. and Mrs. W. Graham Wright

**Gary M. Jones Scholarship**

**Anna McDonald Memorial**

Case Junior Retirees

**Margaret Fortune Memorial**

Case Junior Retirees

**Andrew McNally, III**

Richard R. Macsherry

**Christopher Waite Scholarship**

**E. Judson Waite Memorial**

Mr. and Mrs. John N. Blackman  
Sally Bocciaolatt Campbell and Lance Campbell  
Andrew and Helen Jean Dick  
Regina A. Du Mond  
Ted Geller  
Frank and Marianna Hannigan  
Brian and Barbara Hayes  
Helen W. Hayes  
Roy F. Hilden  
Dr. Bernard and Renee Lustick  
James M. McSharry  
Katherine M. McSharry  
Mutual Marine Office, Inc.  
Thomas E. Niehaus  
Quando Ltd.  
Madeline A. Rooney and Douglas E. Bishop  
Diana and Daniel Sacco  
Ann M. Sheehan  
Dr. and Mrs. Irwin K. Stone  
John Sebastian Vaneria  
Mr. and Mrs. Theodore S. Will, Jr.  
Mr. and Mrs. Henry H. Willmott  
Mr. and Mrs. W. Graham Wright

**Roland Walroth**

Dean Fuller

**Katherine Wright**

Nancy Young Duncan

*“Our priority is simple —  
supply all the aid we can to make  
the North Country an even better  
place to live.”*

*John B. Johnson, Jr., President  
Northern New York Community Foundation Board of Directors*

## Leaving a Legacy to the Community



Charitable bequests are an important way Americans make lasting contributions to their communities. If your will includes a bequest to the Foundation, we thank you for your thoughtfulness. We invite you to inform us if you have named the Foundation so that we may acknowledge you along with the other special people who have made future commitments. The confidentiality of all bequest provisions is maintained. If your completed will does not include a charitable bequest, you might consider adding one through a codicil.

Because a charitable bequest is fully deductible from your estate, significant tax savings may result. These savings enable many people to make a charitable gift while

preserving most of the legacy they intended for their heirs. You don't need a large estate to make a bequest. It can be of any size and can take many forms.

Some individuals have established living trusts instead of having a will. Such trusts can include charitable provisions similar to other types of bequests.

It is important to provide the exact name of any charity you name as beneficiary so that your gift can be transmitted correctly. For the Foundation, the proper designation is the **Northern New York Community Foundation, Inc.**

# THE BASICS



## FRIENDS OF THE FOUNDATION

*The Foundation offers donors a variety of ways to achieve charitable objectives. Friends of the Foundation have made gifts during their lifetimes or through their estates. Lifetime gifts are outright or in exchange for life income. They may be for unrestricted use or to establish in perpetuity a scholarship or fund for a particular organization or area of interest. Some funds permit the donor to make suggestions on the fund's use. Whether through an outright bequest or the establishment of a charitable remainder trust, many have supported the Foundation through their estates.*

†Deceased

Norman R. and Cynthia R. Ahlheim  
Donald C. Alexander  
Barbara Amos  
Jane M. and James T. Bernier, Sr.  
Bond, Schoeneck & King  
Douglas and Mary Jane Brodie  
Elizabeth Brown  
Michael K. Brown  
Brownville Specialty Paper Inc.  
Canton Community Fund  
Susan Carlin  
†William B. and †Frances P. Carter  
Case Junior Retirees  
Floyd and Mary-Beth Chandler  
William A. and Ruth E. Chapin  
Lee Clary  
Climax Manufacturing Company

Clover Capital Management  
Benjamin P. and Margaret B. Coe  
Mary G. Colton  
Nancy R. and William W. Conde, III  
Dr. George G. and Lis S. Couch  
William C. and Margaret C. Couch  
Keith B. and Mary D. Coughlin  
Sidney T. Cox  
George R. Davis  
Morse G. and Mary T. Dial  
Patricia and John Doldo, Jr.  
Neville A. and Jean D. Dowe  
Edward W. and Jean M. Duffy  
Nancy Young Duncan  
Ellsworth Family  
Frank A. Empsall  
Marlene R. Ennis

## FRIENDS OF THE FOUNDATION

Ennis-Sarti Family Fund  
James B. and Ruth M. Fish  
Richard O. Flechtner  
Everett G. and Judith J. Foster  
Royal Garlock, II  
Janet J. and Henry L. George, III  
Ann and H. Pim Goodbody, Jr.  
A. Edward Gordon  
Larry E. Gordon  
Elizabeth Wise Graham  
Dr. David G. Gregor  
Shirley P. Griggs  
Barbara D. and †Robert J. Hanrahan  
David L. and Suzanne Wise Hawley  
Haylor, Freyer & Coon, Inc.  
Constance A. and †James W. Higgins  
John C. Hirschey  
Lee T. and Deborah B. Hirschey  
Urban C. and Sally H. Hirschey  
Dorothy P. and †Robert G. Horr, Jr.  
Richard C. Howland  
HSBC Bank - Regional  
Josephine Hudson  
Charles R. and Marjorie A. Hyde  
Ierlan Family  
George G. and Paula D. Inglehart  
Susan M. and John B. Johnson, Jr.  
Johnson Newspaper Corporation  
JRECK Subs, Inc.  
James and Evelyn Kanik  
Robert J. and Valerie S. Kayser  
Key Bank of Central New York  
†David C. and †Jane L. Knowlton  
Joan L. and †Ralph J. LaClair  
Carleton H. and Beverly T. Lamica  
Mart and Mai Liinve  
Dr. John F. and Jane N. Lormore  
Richard R. and Mary H. Macsherry  
Macsga Family  
Anthony J. Malara-  
    Robert F. Dacey Memorial  
Dr. Ralph J. Marilley, Jr.  
Richard Marilley  
†John F. Marsellus  
Kenneth J. and Marion R. McAuliffe  
Mary M. McDonald  
    and G. Theodore Mascott  
Donald F. and Barbara A. McGrann  
Joseph R. Meichelbeck  
Hope R. Metcalf  
Tony and Kay Morgia  
Viggo Mortensen  
J. Richard and Carol K. Munro  
New York Casualty Insurance  
James L. and Martha O'Donnell  
Pines Bridge Foundation  
Mark S. and Maria F. Purcell  
William J. and Catherine B. Quencer  
Ramada Inn  
Marjorie A. and David M. Ransom  
Dora E. and Arthur F. Reid, Jr.  
Grace Louise Reinman  
Margot Remington  
Maggie Rizer  
Louise and Mark Scarlett  
Erma R. Schell  
Richard M. and Ann D. Schmidt  
Mary Margaret and  
    †Richard F. Schwerzmann  
John H. and Patricia C. Shortt  
Helen E. Smith  
Richard E. and Carol Smith  
Philip J. and Emily G. Sprague  
Eunice Stone  
Dr. Irwin K. and Wilfreda B. Stone  
Dr. Jan K. Turcotte  
Alex C. Velto  
Elizabeth A. Walker  
T. Urling and Mabel B. Walker  
Watertown Pepsi-Cola  
Watertown Savings Bank  
Robert E. and Elizabeth Price Meyers Wehrle  
P. Owen and Dorothy E. Willaman  
Henry H. and Emily T. Willmott  
Anderson Wise  
R. Halsey Wise  
W. Graham and Grace A. Wright  
WTNY-AM/WTNY-FM  
WWNY-TV7  
Wende and William J. Young, III

## Advisor Information

As a professional advisor, you play a key role in increasing the charitable resources of the Northern New York community. One of the simplest and most important questions you can ask your clients is the giving question – “*Are there charitable or community needs you would like to consider in your estate planning?*”

Charitable giving offers specific tax benefits that can assist your clients to achieve financial, personal or business goals. By giving through the Foundation, your clients can receive the full benefit of their contributions while supporting the charities of their choice, now and in the future.

With 70 years of experience, the Northern New York Community Foundation is a center for charitable giving in the community. Whether your clients are interested in building a tradition of family involvement in charitable giving or in finding an alternative to a private foundation, we can help you address their interests and goals. Since the Foundation is both permanent and flexible, donors are assured that the spirit of their gifts will endure.

The Foundation provides numerous options for establishing charitable funds based on your clients’ interests and desired level of involvement. Through a variety of gift planning options, we can help you serve your clients in developing bequests, funds, and trusts that will carry out their unique charitable goals.

For more information or to request a copy of the Advisor Information Packet, please call Alex Velto at the Northern New York Community Foundation, 315-782-7110. The packet covers a range of topics, including what assets donors can use to make a gift, the types of funds and deferred giving options available through the Foundation, and the tax benefits of gifts to a community foundation.



### At a Glance. . .

**Legal Name:** Northern New York Community Foundation, Inc.

**Federal Tax ID Number:** 15-6020989

**Sample Will Language:** Provided upon request

**Gift of Securities, Real Estate, Life Insurance:** Accepted. Transfer information upon request

**Life Payment Plans, including Charitable Gift Annuities, Charitable Remainder and Lead Trusts:** Tax calculations and projections provided as well as documents.

**If you are interested in a Scholarship or Grant:** The Foundation annually awards scholarships to high school seniors for their freshman year in college, college sophomores for their junior year and non-traditional students for any year in college or technical school. Students must be enrolled in a full-time undergraduate program.

Applications are available in mid-February. Deadline for return is April 1.

Grants to non-profit organizations are awarded quarterly. Application deadlines are *February 1, May 1, September 1, and November 1.*

Please call us for a copy of our grant guidelines.

# Northern New York Community Foundation, Inc.

## Financial Summary

*Fiscal year ending December 31, 2001*

### Assets

Current Assets	\$ 1,190,321.00
Fixed Assets Net of Appreciation	18,375.00
Investments	20,527,557.00
Gifts & Bequests Receivable	<u>1,618,599.00</u>
<b>TOTAL</b>	<b><u>\$23,354,852.00</u></b>

### Liabilities and Fund Balance

Grants Payable	561,566.00
Endowment Liability	577,669.00
Gift Annuity Liability	206,175.00
Total Fund Balance	<u>22,009,442.00</u>
<b>TOTAL</b>	<b><u>\$ 23,354,852.00</u></b>

### Summary of Transactions

#### Support and Receipts

Gifts and Contributions	
1,038,762.00	
Income from Independent Trusts	25,741.00
Income from Investments	476,022.00
Gain on Sale of Investments	<u>(1,211,849.00)</u>
<b>TOTAL</b>	<b><u>\$ 328,676.00</u></b>

#### Disbursements

Grants	1,035,520.00
Administrative	216,277.00
Depreciation	6,943.00
Amortization of Gift Annuity	<u>24,973.00</u>
<b>TOTAL</b>	<b><u>\$ 1,283,713.00</u></b>
<b>NET INCREASE</b>	<b><u>\$ ( 955,037.00)</u></b>

*The Northern New York Community Foundation, Inc. receives income from outside trusts.  
The market value of these trusts on December 31, 2001 was \$4,253,162.90*

## Northern New York Community Foundation, Inc. PAST DIRECTORS

Mary Goodale	1930-1946	Samuel B. Wardwell, Jr.	1968-1974
Delos M. Cosgrove	1930-1934	Robert E. Wehrle	1968-1973
Robert J. Buck	1930-1941	James W. Higgins*	1970-1985
Harvey R. Waite*	1930-1955	Arthur C. Peckham	1970-1976
John N. Carlisle	1930-1932	Karl W. Galliger	1973-1981
David M. Anderson*	1930-1935	Rita F. Mackey	1974-1980
G. Seymour Knowlton	1930-1947	Frank A. Empsall	1974-1986
Addison F. Wardwell	1930-1934	Donald J. Veniard	1975-1982
Bernard Gray*	1930-1964	James B. Fish*	1976-1986
John H. O'Brien	1934-1953	Wilfreda B. Stone	1976-1983
M. Seeley Pruyne	1934-1934	Frances P. Carter	1980-1990
R. G. Hannah	1935-1955	Richard O. Flechtner*	1981-1991
J. F. Amos	1935-1958	P. Owen Willaman	1982-1992
Clarence Kinne	1935-1950	Robert G. Horr, Jr.*	1982-1992
Walter Atkinson*	1942-1968	Floyd J. Chandler	1983-1993
Ruth K. Child	1947-1968	John Doldo, Jr.	1983-1993
Albert B. Scholl	1948-1963	Barbara D. Hanrahan	1983-1994
Ross Barker	1951-1968	Norman R. Ahlheim	1985-1995
Delos M. Cosgrove, Jr.*	1953-1980	Everett G. Foster*	1985-1995
Howard Farrington	1955-1967	Anderson Wise*	1986-1996
Brainard Rushlow	1956-1975	Lee T. Hirschey*	1986-1996
Russell Wright	1958-1970	David E. Tinker	1996-1998
Kenneth Wager	1963-1967	Richard E. Smith*	1990-2000
Edward Duffy	1964-1968	Grace A. Wright	1990-2000
Hiram Arthur	1967-1971	Jane N. Lormore	1991-2001
William C. Couch*	1967-1985	James L. O'Donnell	1991-2001
W. Leonard Mahanah	1968-1976		

*\*Served as president*

*Northern New York  
Community Foundation Staff*

Louise E. Scarlett  
*Administrative Assistant*

Alex C. Velto  
*Executive Director*

Teresa Ierlan-Walker  
*Financial Assistant*

