

FREDERICK COUNTY GIVES



Geraldine "Gerri" and Bruce Wilson smile for the camera. After Gerri's passing, Bruce created The Bruce and Geraldine Wilson Charitable Fund with the Community Foundation.

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Fund Founder Puts IRA to Work in Building a Legacy

Bruce Wilson was getting his affairs in order after his wife of 59 years passed away. His financial advisor encouraged him to think about a charitable gift that would help him achieve several goals: honor his wife, build a legacy of charitable giving, and receive tax and other financial benefits.

Bruce said he didn't have to think about it; partnering with the Community Foundation not only made sense financially, it felt good too.

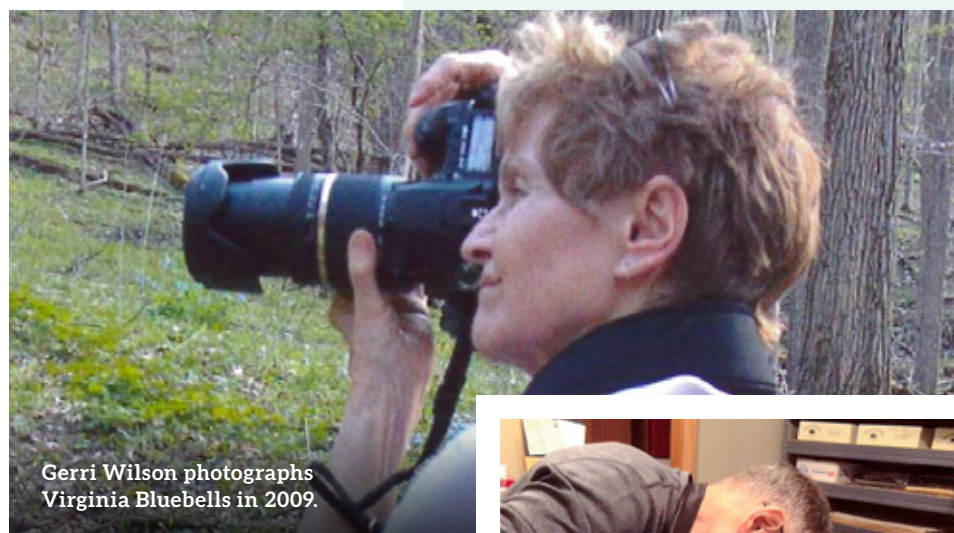
Bruce and Geraldine Wilson met when they were both music education undergrads at the University of Michigan. Bruce said "Gerri" had been a singer from a young age and was a seasoned performer by the time she graduated from high school.

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“She became a master teacher,” Bruce said. “She considered teaching to be a performance art. Her students loved her because she thoroughly engaged with them.”

Bruce also enjoyed a career in education, starting as a music teacher, moving into higher education, transitioning into music archival work, and ultimately serving as Head of the Michelle Smith Performing Arts Library at the University of Maryland, College Park.

The couple raised a son who lives in Middletown with his wife and their 4-year-old daughter. After Bruce and Gerri retired, they both pursued other art forms. Gerri became a nature photographer and Bruce explored the paper arts. From their vacation home in West Virginia they worked together with others to found community organizations to support art education in the local schools and to promote the work of area artists.



Gerri Wilson photographs Virginia Bluebells in 2009.

After Gerri passed away in 2021, Bruce said, “she did not choose to live with Alzheimer’s Disease in her final years, but she bore it with grace – friendly, appreciative, sweet and loving to the end.”

While discussing his estate, Bruce’s financial advisor suggested making a charitable gift to offset tax burdens and to honor the couple’s passion for the arts. Bruce created **THE BRUCE AND GERALDINE WILSON CHARITABLE FUND** with the Community Foundation that supports their life-long love of the arts through community organizations and benefits the Alzheimer’s Association. Bruce was able to create this fund with a required minimum distribution from an IRA.

“People should know that if they made investments and they are over the age of 70, they can reduce their tax liability with a gift to charity,” Bruce said. “You can accomplish something philanthropic that does what you want, and help your own financial situation at the same time. You can benefit other people and yourself.”

Bruce also made a planned gift that is built into his estate and will come to fruition after his lifetime. He said that partnering with the



Bruce Wilson inks a cross-section cut of a Beech tree stump in preparation for making a limited edition print in 2016.

Community Foundation allows him to support multiple charities annually during his lifetime and that it was important to know that his estate gift will continue to benefit causes he and his wife cared about for generations to come.

“It’s not a glorious sum, but it’s a portion that I feel will do some good,” Bruce said. “It satisfies me to know that when both of us are gone the resources that we earned while we were working in the arts will continue to support the arts. The arts need private philanthropy to survive and thrive.”

TO LEARN MORE about making a gift or starting a fund to impact a cause you care about, contact Becki DeLauter at b.delauter@FrederickCountyGives.org.



Gerri Wilson conducts a choral workshop in 1987.



New Investment Option Focuses on Sustainability

When a donor creates a fund with the Community Foundation, they can recommend their gift go into one of five investment portfolios. In keeping with our mission to enrich the quality of life in Frederick County now and for future generations, and our goal to become a more sustainable and inclusive, equity-focused organization, we are proud to be offering an additional investment choice: The “Sustainable Focus Option” in addition to our more traditional investment options.

What is sustainable investing?

Sustainable investment portfolios have the dual objectives of generating strong investment returns while also having positive effects on society. Investors often construct a sustainable portfolio by screening out companies that are rated poorly on sustainable factors and then refine their selection by giving extra weight to the stocks and/or bonds of companies with high ratings for sustainability.

What are some of the benefits of sustainable investing?

Investors have the option to allocate money in a way that is consistent with their values. Put simply, a sustainable portfolio is a portfolio with a purpose. Donors can recommend that their fund be invested in ways that aim to have a positive impact on people and the planet, via the Community Foundation’s Sustainable Focus option.

How will the Community Foundation assess this portfolio to ensure it is achieving its vision?

We review all investment options on a regular basis to make sure we are meeting our performance standards. For the Sustainable Focus option, we will review performance quarterly and review the holdings of our funds annually to make sure they are aligned with our expectations.

Read more FAQs and learn about sustainable investing and the Community Foundation’s investment options at FrederickCountyGives.org.



(Left to Right) Pragna Yalamanchili, 2023 Youth in Action honoree; Pat Rosensteel and Sharon Jacko, 2023 Wertheimer Fellows for Excellence honorees.

WERTHEIMER NOMINATIONS WILL BE ACCEPTED IN MAY

The Community Foundation will be accepting nominations for The Wertheimer Fellows for Excellence in Volunteerism Award from May 1–31. The applications must be completed online via our website – FrederickCountyGives.org.

The Wertheimer Fellows award honors the legacy of the late Janis Miller Wertheimer, a well-known Frederick businesswoman and prolific volunteer. The awards program is made possible through The Janis Miller Wertheimer Endowment Fund. Since it was started in 2003, more than 64 individuals have been celebrated for their commitment to community service.

The Wertheimer Youth in Action Award, now in its 13th year, recognizes youth under the age of 18 who are positively impacting the community by volunteering their talents and energies in extraordinary ways.

The honorees will be recognized at the Community Foundation’s Annual Report to the Community in November 2024. Wertheimer Fellows are awarded \$25,000 to establish or add to a permanent fund with the Community Foundation for the nonprofit or charitable endeavor of their choice. The Wertheimer Youth in Action honoree will receive a \$2,000 grant to support a Frederick County nonprofit organization of their choice.

LEARN MORE about Janis Wertheimer and the Wertheimer Awards at FrederickCountyGives.org/Wertheimer.

The Community Foundation's GRANT SNAPSHOT

Thanks to the support of donors, last year the Community Foundation distributed \$7.1 million in grants to hundreds of nonprofits serving in the areas of health and human services, youth programs, historic preservation, basic human needs, the arts, elder care, animal well-being, the environment, and so much more.



Frederick Health Hospice received grants from **THE KIWANIS CLUB OF FREDERICK FUND** and **THE JOHN L. AND LUCILLE H. PONTON CHARITABLE FUND** to support Camp Jamie, a grief camp for children, adolescents, and teens. Camp Jamie helps children and teens learn coping skills and process their feelings related to the death of someone special in their lives. Professional grief counselors and trained volunteers provide education, activities, and therapy in a safe environment.



THE WALTER W. AND CATHARINE PRENTISS PLUMMER ENDOWMENT FUND supported the conservation efforts of the Chesapeake Bay Foundation, specifically in the Frederick County area. Volunteers plant trees along stream beds throughout the Monocacy Watershed to protect water quality and prevent erosion.



Transformative Arts Project offers programs that empower communities through creative expression, from traditional art to photography, amplifying individual voices in the process. Grants from **THE ROSEBUD FREDERICK SENIOR SUPPORT FUND, THE EDGAR AND GERALDINE VIRTS MEMORIAL FUND, and THE EASELS IN FREDERICK FUND** supported these efforts, such as the Creative Aging and Technology program shown here, where seniors learned new skills using today's technology.



C&O Canal Trust, Inc. received grants from **THE C&O CANAL ENDOWMENT FUND FOR FREDERICK COUNTY** and **THE C&O CANAL DONOR RESTRICTED PROJECTS/ANDY AND JIM MACKINTOSH CANAL RUN POINT OF ROCKS LOCKHOUSE FUND** to support renovations to Lockhouse 28 and Lockhouse 29 (pictured here). The renovation process requires an engineering study which includes an examination of the physical condition of the lockhouse and recommendations for restoration, rehabilitation, and preservation.



YMCA of Frederick County received a grant from **THE ROBERT DE LAUTER YOUTH MENTORING FUND** for their Upward Program. This program provides guidance and activities, such as the car wash shown here, and promotes healthy living and positive behaviors in teens ages 12-17. YMCA of Frederick County received fifteen other grants supporting the wide variety of programs they offer, including day camps, senior wellness programs, sports, and arts.



Tank is an active puppy and tried to jump down a short set of stairs, causing a break in his leg that led to amputation. Frederick County Humane Society received a grant from **THE CONVERSE FAMILY ENDOWMENT FUND** that helped cover the cost of the surgery. Tank has recovered and is doing well!



Strategic Funding Partners OPEN DOORS

After moving to the U.S., Ana improved her English through Literacy Council courses and became active in her children's elementary school community.

As you read this newsletter, there's a mother of two looking into an empty cabinet wondering how she is going to feed her kids dinner tonight. There is a grandmother scared she will have to leave her home because it's not safe. There is a family desperately seeking resources because their loved one is ready to enter treatment for substance use, but they can't find a provider.

These families live right here in Frederick County. Many individuals in our community face challenges and barriers for a better quality of life. There are too many for us to tackle alone.

The key to solving the problem is in your hands as a Strategic Funding Partner.

As part of the Community Foundation's strategic initiatives, we are committed to supporting families with children, ensuring seniors safely age in place, and providing access to care and resources for people facing substance use disorder. Our strategic grants process is rooted in science and grounded in collaboration. The Community Foundation is a conduit and in partnership with donors like you, we can help provide immediate relief and long-term solutions to some of Frederick County's most pressing challenges.

Last year we were proud to work with local organizations to help Ana build confidence as an engaged parent and community member, to help Leo find a place to call home where he feels safe, and to help Rayhan on his journey through recovery. Progress was made, but not enough. For every grant we funded last year, two went unfunded. Simply put, for every door opened, two remained closed.



But you have the key to open them. Become a Strategic Funding Partner today.

By becoming a Strategic Funding Partner, you can help bring about transformational change.

You are the key to helping us achieve even greater impact and lasting change in the lives of those who need it most.

THREE WAYS TO BECOME A COMMUNITY FOUNDATION STRATEGIC FUNDING PARTNER



Complete the form below and return it in the envelope provided by May 15, 2024, go to FrederickCountyGives.org/sfp, or scan the QR code here to make your gift today.



For more information, contact Becki DeLauter, Philanthropic Services Manager 301.695.7660 | b.delauter@FrederickCountyGives.org.

Name(s): _____

Address: _____

Phone: _____ Email: _____

I wish to participate in the application review process with the Grants Committee in the Fall of 2024 (date to be determined).

Yes No

YES! I understand that a gift of \$1,000 or more enables me to be a Community Foundation FY25 Strategic Funding Partner and gives me the option to participate in reviewing grant applications. **I agree to commit funding to the following area(s):**

- | | |
|---|---|
| \$_____ Supporting families with children | \$_____ Responding to substance use disorder |
| \$_____ Preparing for an aging population | \$_____ An unrestricted gift supporting the greatest need |

The name to appear in all publicity and printed materials is as follows (please print clearly):

Signature of name as written:

DONOR IMPACT | New Funds

THE BRUNSWICK COMMUNITY MEDICAL FUND

Founded by Brunswick Medical Center, Inc. to support nonprofit organizations offering medical assistance to Brunswick residents.

THE DAVID J. A. FISHER SCHOLARSHIP FUND

Founded by Frederick County Public Schools for graduates of Catoctin High School pursuing a career in education.

THE FREDERICK HISTORIC CLOCK TOWER PRESERVATION FUND

Founded by Evangelical Reformed United Church of Christ to support the preservation of the City of Frederick's Historic Clock Tower structure located atop Trinity Chapel.

THE KIYOSHI AND THELMA HIGUCHI ENDOWMENT FUND

Founded through Mrs. Higuchi's estate provisions to support Frederick Arts Council, Girl Scout Council of Nation's Capital, ACTS Legacy Foundation, Frederick County Public Libraries, City of Frederick Office of Special Events, Frederick County Public Schools Fine Arts Department, Federated Charities, and American Heart Association.

THE THELMA T. HIGUCHI FUND FOR HEART MOUNTAIN WYOMING FOUNDATION

Founded through Mrs. Higuchi's estate provisions to support the foundation and its mission to educate the public about the history of this Japanese American internment camp.

THE SHARON AND JEANNE JACKO VETERANS FUND

Founded by Sharon Jacko with her 2023 Wertheimer Fellow for Excellence in Volunteerism Award to support veterans in Frederick County.

THE RUTH KOBE SCHOLARSHIP FUND

Founded by Ms. Kobe for Maryland residents pursuing a career in medicine, nursing, or social work.

THE JOHN AND KATHRYN KUGLER FUND

Founded through the Pauline Draper Fisher Revocable Trust to provide scholarships to Frederick County residents attending Towson University.

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To learn more about starting a fund and to view all of the Community Foundation's funds, visit FrederickCountyGives.org/Give.

DONOR IMPACT | New Funds

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THE CHARLES A. NICODEMUS YOUTH FUND

Founded through Mr. Nicodemus' trust to support nonprofit organizations that offer youth programs in Walkersville, Maryland.

THE ROBERT AND JENILIE PALLA CHARITABLE FUND

Founded by the Pallas to provide grants to nonprofit organizations.

THE QUANTUM FREDERICK SCHOLARSHIP FUND

Founded by Quantum Loophole, Inc. for students pursuing careers in technology, engineering, or computer science.

THE ROSENSTEEL FAMILY FUND

Founded by Pat Rosensteel with her 2023 Wertheimer Fellow for Excellence in Volunteerism Award to support women and children with basic needs.

THE THURMONT BRANCH LIBRARY FUND

Founded by Frederick County Public Libraries to support the Thurmont branch.

THE BRUCE AND GERALDINE WILSON CHARITABLE FUND

Founded by Mr. Wilson to support Evangelical Reformed United Church of Frederick, Willow Road Residents Association, Homewood Foundation, University of Maryland College Park Foundation, Baltimore Symphony Orchestra, Alzheimer's Disease and Related Disorders Association, ArtSpring, Delaplaine Arts Center, Frederick Book Arts Center, Frederick Children's Chorus, and Regents of The University of Michigan.

To learn more about starting a fund and to view all of the Community Foundation's funds, visit FrederickCountyGives.org/Give.



To opt out of receiving this print newsletter, email Brooke Kovalcik at b.kovalcik@FrederickCountyGives.org or call 301.695.7660.



The Community Foundation of Frederick County, MD., Inc., is a 501c3 public charity. A copy of the current financial statement of the Community Foundation is available by writing to the Community Foundation, 312 East Church Street, Frederick, MD 21701 or by calling 301.695.7660. Documents and information submitted under the Maryland Solicitations Act are also available, for the cost of postage and copies, from the Maryland Secretary of State, State House, Annapolis, MD, 21401, or by calling 410.974.5534.

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**The Community Foundation
OF FREDERICK COUNTY**



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