2017 Annual Report Lake Area Foundation

Giving Supports Education

BE A BENJAMIN



"See past the innumerable needs of the moment and uncertainty of the future."



About Our Region

The Lake Area Foundation, serving the ten county LCADD service region, is blessed with water. Lake Cumberland, Dale Hollow Lake and Green River Reservoir, along with the Cumberland and Green Rivers, are all within its boundaries, providing a ready supply of water for its people and businesses as well as the focus for a thriving tourism industry.

In 1977, several young men spent most of the tourist season camping on an island in Lake Cumberland, going to their jobs at a marina during the day and returning to the island at night. They spent their time enjoying nature, fishing, playing guitars and sharing stories. At least one of these young men also spent a great deal of time writing songs. One song born during the summer of 1977 was "Summer on the Water". The song writer was a young man named David Robertson. "Summer on the Water" was later recorded by another great local talent, a young man named Terry Wariner. These extremely talented men granted permission to use "Summer on the Water" as an appropriate theme song for our region!



Summer On The Water

"Summer on the water, and the boats are coming in. Tourists are discussing all the places that they've been. Summer on the water, and I'm sleeping in the bow. Summer on the water; I know I'm addicted now."

> Music and Lyrics by David Robertson Recorded by Terry Wariner Guitar by Steve Wariner

> > Annual Report Credits:

Jean Wilson Judy Hachey

OPTIMISM: Ben Franklin and the 200-Year Endowments

In 1785 a French mathematician named Charles Joseph Mathon de la Cour wrote a parody of Benjamin Franklin's Poor Richard's Almanac in which he mocked the unbearable spirit of American optimism represented by Franklin. The Frenchman fictionalized about "Fortunate Richard" leaving a small sum of money in his will to be used only after it had collected interest for 500 years.

Franklin, who was seventy-nine years old at the time, wrote back to de la Cour, thanking him for the great idea and telling him that he had decided to leave a bequest to his native Boston and his adopted Philadelphia of 1,000 pounds to each, on the condition that it be placed in a fund that would gather interest and support the public good for the succeeding 200 years.

Franklin's optimism was not an easy optimism to embrace. Since no nation in the modern world had ever attempted what the American colonies had set out to do, it was appropriately called the "American Experiment." The future of the new nation was tenuous at best, and no one knew that better than Franklin. Walking out of the Constitutional Convention in 1787, Benjamin Franklin was asked, "What kind of government did you give us?" Franklin replied, "A republic if you can keep it."

Notwithstanding the perils that lay ahead, Franklin's irrepressible optimism enable him to see past the innumerable needs of the moment and uncertainty of the future. Two years later in 1789 he wrote a codicil to his will that provided funds to establish the 200-year endowment.

SEEDS OF OPTIMISM

People with a fearful, pessimistic view of the future are never going to fund multigenerational or perpetual endowments. Neither will those who think the world is destined to get worse and worse. They may be the kindest and most generous souls on earth, but they are not endowment makers. For social, political, and/or religious reasons, it fundamentally goes against the way they see the world.

Great institutions are built by visionaries — optimistic leaders and supporters who are certainly aware of the ills and evils of society but choose to focus their attention on the preferred future. They look ahead, visualize what could be done and employ their resources accordingly. Those are the kind of forward-thinking optimists that endeavor to secure and stabilize the future through endowments. Those are the donor relationships we want to cultivate.

Conversely, fundraisers who regularly play the crisis card to motivate their donors to give are in effect diminishing the possibility of a gift to the endowment. They plant a pessimistic seed in the donor's mind suggesting that the organization will not survive.

Benjamin Franklin's will and codicil are extraordinary documents in the history of endowments. Franklin did not invent the endowment, but true to form, the clever and irrepressibly creative Franklin could not resist tinkering with an idea in order to improve it. In the 1789 codicil to his will, he donated 1,000 pounds to the inhabitants of his native Boston and another 1,000 pounds to his adopted Philadelphia. The condition of the gift to each city was that it be placed in a fund that would gather interest and serve a



designated purpose for a period of 200 years.

The purpose of his gift, as with many such gifts, related to his own experience. The young Franklin received his professional training as a printer's apprentice and got his start in business with a loan from two friends. In the codicil he noted, "(That loan) was the foundation of my fortune and all the utility in life that may be ascribed to me." So then, it is not surprising that the purpose of his endowment was to help young apprentices.

His instructions were laid out with the following words:

"The Trustees shall...let out the sum upon interest, at five percent, per annum, to such young married artificers, under the age of twenty-five years, as have served an apprenticeship in the said town, and faithfully fulfilled the duties required in their indentures, so as to obtain a good moral character from at least two respectable citizens, who are willing to become their sureties, in a bonk with the applicants, for the repayment of the moneys so lent, with interest, according to the terms hereinafter prescribed..."

WHAT ACTUALLY HAPPENED

In 1894, at the end of the first 100 years, the Boston fund had been used as instructed and had grown to 131,000 pounds (\$391,000). In the following century, the bulk of the proceeds were used to fund public works in Boston. In 1905, \$322,490 was used to establish the Franklin Union, a technical school. The remainder of the funds continued to be loaned out for apprentice programs and scholarships. In 1990, the end of the second century, Franklin's Boston endowment was worth more than \$5,000,000 and the Philadelphia fund about half that. In both cities Franklin's endowment has been used to help thousands of young people and has served as an enduring testament to philanthropy and community service.

In May 2005, a group of exceptionally creative young people selected from all over the nation gathered at the Smithsonian Institute in Washington D.C. for an award ceremony. They were the latest recipients of the Franklin Legacy Prize medals. Franklin's 1789 codicil made provisions for awards to be given annually to outstanding young students, providing silver medals that have been awarded each year since 1793.

Eddie Thompson Ed.D. and Walt Walker

Our Mission...

The Lake Area Foundation is a tax-exempt, nonprofit, autonomous, publicly supported, philanthropic institution. The Foundation's long term goal is building permanent, named, component funds established by many separate donors to carry out and support charitable interests for the benefit of residents of a defined geographic area. The Lake Area Foundation's identified service area consists of Adair, Casey, Clinton, Cumberland, Green, McCreary, Pulaski, Russell, Taylor and Wayne counties in Kentucky, but with the flexibility to expand its service area to other parts of south-central Kentucky as nearby communities express interest in utilizing the Foundation's administrative capabilities; and create funds to serve additional counties. Income from the permanently endowed funds will provide grants in the fields of community and economic development, education, health and human services, the arts, public recreation and beautification in perpetuity.

The Lake Area Foundation Board of Directors recognizes that people were created with the inherent desire to make a difference and to leave a legacy. Lake Area Foundation was created as a vehicle to administer endowed funds which will continue charitable support on behalf of the donor for generations to come.

The Lake Area Foundation exists because "What we do for ourselves dies with us; what we do for others and the world remains and is immortal".



Message from the Chair

As I look back at the past year I think of blessings, change and opportunities. We are blessed with a volunteer board that has vision and commitment to help our communities prepare to meet the needs of the present as well as the future. We are blessed with the countless hours and dedication of Donna Diaz as our Executive Director. We are blessed to have the support of the LCADD Board of Directors and staff. We are blessed that Donna continues to make progress and improvement after her stroke. We are saddened that she has retired and miss her enthusiasm and timeless work for our ten county area.

With blessing there is often change and with change there are opportunities. We congratulate Darryl McGaha and Nick Hazel with their promotion as Executive Director and Deputy Executive Director of the Lake Cumberland Area Development District. They have been working diligently in this time of transition and we appreciate their continued support by allowing staff to volunteer their time to assist the Foundation with critical office support and expertise. So with transition we have opportunity to reflect and be proud of the last five years and opportunity to move forward into the future.

We continue establishing new funds as well as additional gifts to existing funds. We look forward to opportunities to assist non-profits and individuals in their support of their communities. Providing necessary additional resources. "Doing good forever through Lake Area Foundation. We look forward to opportunities to raise awareness and education about the Lake Area Foundation.

Sincerely, Joe Walters, Chairman Lake Area Foundation



Regional Board of Directors:

Joe Walters, Chair Dr. Jerry Westerfield Winter Huff, Secretary Anita Tucker, Treasurer Janet Clark, Past Chair Judge John Phelps, Jr. Sharon Payne Bill Norris Shawn Ford Kenny Ramsey

County Advisory Committees

Adair County

Linda Waggener Sharon Payne Gale Cowan Ellen Zornes

Casey County

Gina Goode Leanne C. Davis Steve Sweeney Ronald Wright Josh Switzer

Clinton County

Richard Armstrong Lisa Beard Steve Tallent Willard Johnson Hershell Key Charlotte Bernard Penny Stearns

Cumberland County

Bill Norris Chesley Anderson Vickie Wells Hazel Smith Kelly Guffey

Green County

Shawn Ford Peggy Frank Laura Edwards Joe Walters Marla Durrett Jay Shofner

McCreary County

Nancy Tucker Kay Morrow Ruth VanOver Megan Davis

Pulaski County Lois Hatfield Linda Bourne Christie Adams

Russell County

Mickie Jo Tarter Tonya Meece Sandy Hockensmith Dr. Jerry Westerfield Janet Clark Anita Tucker Lesa McDonald Judy Hachey Kevin Tarter Jean Wilson

Taylor County

Joe and Susan Walters Wanda Washington Yevette Haskins Madeline Gumm Mr. & Mrs. Gary Seaborne

Wayne County

Frank V. Phillips Jeffrey Edwards Winter Huff Jeanne Tate Charlotte Johnson



Lake Area



Five years ago, Donna Diaz had a vision for a community foundation for the 10 counties served by the Lake Cumberland Area Development District (LCADD). Federal and state government resources were drying up, and she saw the very real need for the region to become more self-sufficient and less dependent on government funding.

She proposed the question: "What if citizens of the entire region pooled their resources and used earnings to provide good things for current and future needs?" Many doubters said it couldn't be done, but the word "can't" just isn't in Donna's vocabulary.

After much study and deliberation and with the generous support of the LCADD Board of Directors, Donna launched the Lake Area Foundation (LAF) as a new tool in the regional tool box. The LAF was created in faith knowing that the need existed for this "framework for giving," and that dozens, even hundreds of funds would come with time.

Since then, Donna has worked tirelessly to build the Foundation, knowing that it would be a long, slow process to even educate the population about this new concept. But knowing that a journey of a thousand miles begins with a single step, she trudged forward.

Donna's thought was that the Foundation would begin with a simple idea: that charitable giving should be easy, flexible and effective. She envisioned the Foundation would hold a permanent, yet flexible, collection of endowment funds contributed by people from all walks of life who want to give something back in a way that matters to them.

Today, the still-young Foundation manages 34 funds which support everything from high school scholarships to community development projects to services for children and families. While there is much more work to be done, we would like to take this opportunity to thank you, Donna Diaz, for planting the seeds for an organization that has great potential to benefit our region now and forever.

WELCOME TO THE FIFTH LAKE AREA FOUNDATION ANNUAL MEETING IN HONOR OF DONNA DIAZ

We come together tonight to celebrate our fifth year in serving the ten county Lake Cumberland region. Hats off to Chair Joe Walters along with all members of the regional board and local advisory councils for the way they have worked together to make good things happen throughout the year. Lake Area Foundation continues to move forward.

- We are a local organization with deep roots in the community.
- Our professional staff and board has broad expertise regarding community issues and needs.
- We provide highly personalized service tailored to each individual's charitable and financial interests.
- Our funds help people invest in the causes they care most about.
- We accept a wide variety of assets and can facilitate even the most complex forms of giving.
- We partner with professional advisors to create highly effective approaches to charitable giving.
- We offer maximum tax advantages for most gifts under federal law.
- We multiply the impact of gift dollars by pooling them with other gifts and grants.
- We build endowment funds that benefit the community forever and help create personal legacies.
- We are a community leader, convening agencies and coordinating resources to create positive change.

NEW FUNDS

This year we are pleased to welcome three funds into the Lake Area Foundation family.

"Green County Community Fund" was started by the Green County Local Advisory Committee. Proceeds from this fund will be available to meet the local needs of Green County as identified by Green County Local Advisory Committee and recommended to the LAF Board of Directors.

"Taylor County High School Alumni" was started by Superintendent Roger Cook on behalf of the Taylor County High School Alumni. Proceeds shall be used to provide need and merit based scholarships for junior and senior high school students wishing to take dual credit courses and/or students graduating from high school in Taylor County. "Caleb's Cause" was started by Clint Bertram in honor of his son Caleb. The mission of Caleb's Cause is to help provide financial or tangible assistance to families and individuals with unforeseen medical expenses.

ENDOW KENTUCKY

We continue to celebrate being a recognized partner in the Endow Kentucky Tax credit program. Donors to funds in Lake Area Foundation received approval over \$5,000 dollar for dollar state tax credits in the current year. The most recent state budget contains provisions for up to \$1,000,000 in tax credits for both FY '17 and FY '18. Make your plans now to take advantage of this additional benefit.

LAKE CUMBERLAND 360

Lake Cumberland 360 has looked a little different each year, as different charities have sponsored different "challenges" as fundraisers. Here is a glimpse of Lake Cumberland 360 2017 style:

On June 10, 2017, three challenges benefitted four local and regional charities. The Lake Cumberland 360 Motorcycle Challenge benefitted the ARC Pregnancy Center, with approximately \$1,000 for current needs and \$400 to be added to that endowment fund. The Lake Cumberland 360 Trail Ride in Wayne County and The Lake Cumberland 360 Motorcycle Challenge benefitted the Lake Cumberland Children's Advocacy Center with approximately \$800 for current needs and \$541 to be added to their endowment fund. The Lake Cumberland Motorcycle Challenge also added \$581 to the current needs of the Emergency Shelter and \$500 to their endowment fund. The Doc Monin Car Show provided \$1,500 for current needs for God's Food Pantry and the Lake Cumberland 360 Motorcycle Challenge added \$ 936.78 for current needs.

GIVING TUESDAY

On November 29, 2016, representatives of the Senior Services Fund participated in Giving Tuesday with great success, collecting over \$11,000 through a "Jail and Bail" activity and other activities.

2017 Annual Meeting













"THANK YOU"

Giving Tuesday









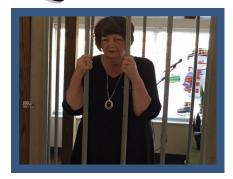




















Lake Cumberland 360 Photo Highlights









Motorcyclists, horse riders and antique car enthusiasts participated in the Fifth Annual Lake Cumberland 360, held in June.

















Proceeds from LC 360 Benefit LAF Funds

Proceeds from the Lake Cumberland 360 motorcycle ride went to the Lake Cumberland Children's Advocacy Center (The center serves all of LCADD's 10-county service area); ARC Pregnancy Center (The ARC Center serves Adair, Casey and Russell County); and Russell County Emergency Shelter. Proceeds from the Doc Monin Memorial Car Show went to God's Food Pantry.

Thanks for Another Great Lake Cumberland 360

The Lake Area Foundation would like to thank everyone who supported the Fifth Annual Lake Cumberland 360 which was held on June 10th. The idea behind this annual event is to provide a platform which allows non-profits around the region to plan and work sponsored events with all proceeds helping to meet today's needs while building an endowment for the future. Lake Cumberland 360 is open to any and all non-profit organizations that choose to develop an event and participate.

Thanks to the many volunteers who gave their time and special talents to plan, organize, share resources and venues, promote and staff the signature events. The Motorcycle Challenge, which takes motorcycles all around Lake Cumberland and visits marinas along the way, was done by the ARC Pregnancy Center, Lake Cumberland Children's Advocacy Center and the Russell County Emergency Shelter. The Doc Monin Memorial Car Show raised funds for God's Food Pantry for today's needs and to grow their endowment fund.

As in all community efforts of this kind, it came together as a result of the work and dedication of dozens of volunteers, sponsors and participants (some fitting into all three categories). We extend a big THANK YOU to all of you. The Fifth Annual Lake Cumberland 360 and this great series of events could not have happened without you.

Sponsors

Gaddie Shamrock, Ron and Donna Diaz, Selby Asphalt, Russell County Hospital, Monticello Banking Company, First National Bank, Citizens National Bank, Duo-County Telecom, Bank of Jamestown.

Drawing Items

Russell County Real Estate Company-Lake Cumberland Properties, McQueary's Realty & Auction, McKinley Auction & Real Estate, Golden Rule-Wilson, Down to Earth Realty & Auction, Welcome Home Real Estate Realty, Grider Hill Resort Marina, Lake Cumberland State Dock, Jamestown Resort Marina, Conley Bottom Resort and Marina, Lee's Ford Resort and Marina, Indian Hills Resort-Alligator II, NAPA, Advance Auto Parts, Russell County Kwik Lube, Eli Country Café, Farmer's Produce, The Little Chop Shop, Esto Country Store & Café, Lawless & Smith, Franklin Motors and Pizza Hut.

In-Kind Contributions

Russell County Judge Executive Gary Robertson, Mayor Nick Shearer, Priceless Grocery, Fruit Market, Lake Cumberland Properties, Kim Byrom, Loretta Coppage, Geraldine Johnson, Sandy Hockensmith, Wolf Creek National Fish Hatchery, Innovative Business Concepts, Somerset Food Service, Brown's Food Supply, City of Jamestown, Jamestown Christian Church, Lake Cumberland Children's Advocacy Center, ARC Pregnancy Center, Emergency Shelter/The Inn, God's Food Pantry/Doc Monin Car Club, Caretenders Motorcycle Club, Lake Cumberland ADD/Staff, Russell County Tourist Commission, H.K. Cooper, Clete McAninch, Lake Area Foundation and Central Kitchen Staff.

Funds Created during 2017

During the LAF's fifth year of operation three additional funds were created: Green County Community Fund, Taylor County High School Alumni Fund and Caleb's Cause Fund.

Green County Community Fund was set up by the Green County Local Advisory Committee as an unrestricted fund to help with local needs. Balance as of June 30, 2017-\$1,363.17.

Taylor County High School Alumni Fund was set up by Superintendent Roger Cook, to provide need and merit based scholarships for junior and senior high school students wishing to take dual credit courses and/or students graduating from high school in Taylor County, Kentucky. Recipients must be pursuing undergraduate postsecondary education with the intent to return to Taylor County to pursue the chosen career. Balance as of June 30, 2017--\$138.76

Caleb's Cause "The Mission of Caleb's Cause is to help provide financial or tangible assistance to families and individuals with unforeseen medical expenses." Balance as of June 30, 2017- \$0

Funds Created during 2016

During LAF's fourth year of operation five additional funds were created: We Care of Cumberland County, The Taylor County Development Fund, The Russell County Honor Guard, The Russell County High School Alumni Scholarship Fund and George and Joan Howell Environmental Education Scholarship Fund.

The **We Care of Cumberland County Fund,** chaired by Hazel Smith, began in response to the needs of the very ill and their families for transportation and other supports while undergoing treatments. Proceeds from this fund will be available to meet these needs as identified by the We Care Board of Directors. Balance as of June 30, 2016-\$2500.

The **Campbellsville Taylor County Community Development Grant Fund**, created by Joe and Susan Walters, is to broadly benefit a variety of non-profits in the good work they are doing. Balance as of June 30, 2016-\$2,000.

The **Russell County Honor Guard Fund** is organized and equipped to honor our veterans in life and in death through their activities. Proceeds from this will assist in the day to day operating expenses for this non-profit.

The **Russell County High School Alumni Scholarship Fund** was set up by Superintendent Michael Ford, to solicit all Russell County High School Alumni to donate an amount equal to their year of graduation. By setting the fund up in this manner it is in the reach of all. Balance as of June 30, 2016-\$1,290.01.

The **George and Joan White Howell Environmental Education Scholarship Fund** was set up by George Howell. It will fund a \$5,000 scholarship for one environmental education student each year at Campbellsville University.

Funds Created during 2014/2015

During LAF's third year of operation two additional funds were created: Esther House Fund and the Lake Cumberland Senior Services Fund.

The **Esther House Fund** was started by the Board of Directors of the Esther House as a designated fund to be used for the benefit of the Donor for any and all purposes necessary. Balance as of June 30, 2015—\$2,205. The **Lake Cumberland Senior Services Fund** was started by the LCADD Senior Citizens Centers to help aid the centers where necessary. Balance as of June 30, 2015—\$659.40.

Funds Created during 2013

During the Lake Area Foundation's second year of operation 10 funds were created by various individuals and groups throughout the region. The following is a list of funds established during the year of 2013:

The **Bethany House Fund** was started by the Board of Directors of the Bethany House Abuse Shelter as a designated fund to be used for the benefit of the Donor for any and all purposes necessary. Balance as of December 31, 2013—\$10,000.

The **Lake Cumberland Children's Advocacy Center Fund** was established by an anonymous donor to assist with the on going operation and maintenance of the center. Balance as of December 31, 2013—\$2,000.

The **ARC Pregnancy Center Fund** was established by an anonymous donor to assist with the on going maintenance and operation of the center. Balance as of December 31, 2013—\$2,000.

The **College Operating Fund** was established by the Liberty/Casey County Economic Development Authority to be used for the operating expenses of the Casey County Community and Education Center. Balance as of December 31, 2013—\$2,000.

The **Masselink Beautification Fund** was started by Blaine and Catherine Staat in honor of Carolyn Masselink Wager. This designated fund will provide funding to the City of Liberty to attend to the beautification of the City by purchasing and planting flowers, trees, shrubs and other living greenery. Balance as of December 31, 2013—\$2,100.

The **Linda Hatter Scholarship Fund** was established by the Liberty/Casey County Economic Development Authority to provide need and merit based scholarship for students graduating from high school in southern Kentucky with preference given to students from Casey County and pursuing post-high school education. Balance as of December 31, 2013—\$2,000.

The **Albany Volunteer Fire Dept. Equipment Fund** was created by the Clinton County LAF Local Advisory Committee. As a designated fund the annual income will be used for the purchase of equipment. Balance as of December 31, 2013—\$4,000.

The **Clinton County Women's Circle Fund** was started by the Clinton County Women's Circle to fund unmet needs in Clinton County. Balance as of December 31, 2013—\$2,300.

The **Pulaski County Women's Circle Fund** was started by the Pulaski County Women's Circle to fund unmet needs in Pulaski County. Balance as of December 31, 2013—\$5,045.

The **Durham School Legacy Fund** was started by Alumni of Durham School to assist with efforts to host an Annual Durham School Legacy Festival. Balance as of December 31, 2013— \$800.

The **Taylor County Women's Circle of Hope Fund** was established by the Taylor County Women's Circle to fund unmet needs in Taylor County. Balance as of December 31, 2013—\$1,600.

Funds Created during 2012

During the Lake Area Foundation's first year of operation 11 funds were created by various individuals and groups throughout the region. The following is a list of funds established in 2012:

The **Lake Cumberland Area Development Fund** was started by the Ron and Donna Diaz family as an unrestricted fund to benefit the ten-county Lake Cumberland region. Balance as of December 31, 2012—\$2,780.

The **Pat Bell Administrative Fund** was established by the Lake Cumberland Area Development District staff for the purpose of securing on-going professional administration of the Lake Area Foundation. Balance as of December 31, 2012—\$3,217.

The **Adair County Courthouse Preservation Fund** was started by Dan Antle for the on-going preservation of the Adair County Courthouse. Balance as of December 31, 2012— \$2,000.

The **Adair County Women's Circle Fund** was begun by the Adair County Women's Circle to fund unmet needs in Adair County. Balance as of December 31, 2012— \$2,525.

The **Lindsey Wilson College Fund** was started by Dan Antle to meet on-going needs of Lindsey Wilson College. Balance as of December 31, 2012— \$20,645.

The **McCreary Christian Center Fund** was initiated by the McCreary County Giving Circle to fund unmet needs in McCreary County. Balance as of December 31, 2012— \$2,200.

The **God's Food Pantry Fund** was started by an anonymous donor to provide food for needy families in Russell County. Balance as of December 31, 2012— \$2,000.

The **Habitat for Humanity Fund** was established by an anonymous donor to support the Russell County Chapter of Habitat for Humanity. Balance as of December 31, 2012—\$2,000.

The **Russell County Development Fund** was set up by Dr. Jerry D. Westerfield as an unrestricted fund to cover unmet needs in Russell County. Balance as of December 31, 2012— \$10,000.

The **Russell County Emergency Shelter Fund** was started by an anonymous donor to provide unmet needs for The Inn through the Russell County Emergency Shelter Board. Balance as of December 31, 2012— \$2,000.

The **Russell County Women's Circle Fund** was initiated by the Russell County Women's Circle to fund unmet needs in Russell County. Balance as of December 31, 2012— \$3,525.

We Care of Cumberland County



"Looking to today's needs and future needs"















LAKE AREA FOUNDATION

LAKE AREA FOUNDATION FUNDS

Established	County	Fund	Trust Account Basis	Checking Account Balance	Total
7/1/2012	REGIONAL	OPERATING FUND		\$786.36	\$786.36
12/6/2013	REGIONAL	PAT BELL ADMINISTRATION FUND	\$29,112.03	\$1,572.00	\$30,684.03
11/20/2013	REGIONAL	BETHANY HOUSE FUND	\$12,459.24		\$12,459.24
12/6/2013	REGIONAL	LAKE CUMBERLND AREA DEVELOPMENT FUND	\$73,942.51	\$1,500.62	\$75,443.13
11/27/2013	REGIONAL	LAKE CUMBERLAND CHILDREN'S ADVOCACY CENTER	\$5,579.85		\$5,579.85
5/29/2015	REGIONAL	LAKE CUMBERLAND SENIOR SERVICES FUND	\$37,115.84	\$20.00	\$37,135.84
11/27/2013	MULTI- COUNTY	ARC PREGNANCY CENTER	\$3,001.13		\$3,001.13
12/6/2013	ADAIR	ADAIR CONTY COURTHOUSE PRESERVATION FUND	\$3,816.68		\$3,816.68
5/14/2013	ADAIR	ADAIR COUNTY WOMEN'S CIRCLE FUND	\$4,292.55		\$4,292.55
5/14/2013	ADAIR	LINDSEY WILSON COLLEGE FUND	\$27,872.78		\$27,872.78
10/21/2013	CASEY	CASEY COUNTY COMMUNITY EDUCATION CENTER		\$9,685.51	\$9,685.51
8/5/2013	CASEY	COLLEGE OPERATING FUND	\$2,592.81		\$2,,592.81
11/20/2013	CASEY	MASSELINK BEAUTIFICATION FUND	\$3,300.82		\$3,300.82
8/5/2013	CASEY	LINDA HATTER SCHOLARSHIP FUND	\$2,535.24		\$2,535.24
8/5/2013	CLINTON	ALBANY VOLUNTEER FIRE DEPT. EQUIPMENT FUND	\$5,380.37		\$5,380.37
12/16/2016	CLINTON	CALEB'S CAUSE FUND			
12/20/2013	CLINTON	CLINTON COUNTY WOMEN'S CIRCLE FUND	\$2,630.29		\$2,630.29
7/15/2014	CUMBERLAND	ESTHER HOUSE	\$2,520.45		\$2,520.45
4/14/2016	CUMBERLAND	WE CARE OF CUMBERLAND COUNTY FUND	\$10,263.01		\$10,263.01
8/22/2016	GREEN	GREEN CO. COMMUNITTY FUND	\$1,363.17		\$1,363.17
7/24/2013	MCCREARY	MCCREARY CHRISTIAN CARE CENTER FUND	\$2,940.00		\$2,940.00
4/1/2013	PULASKI	PULASKI COUNTY WOMEN'S CIRCLE FUND	\$6,324.45		\$6,324.45
4/1/2013	RUSSELL	RUSSELL COUNTY DEVELOPMENT FUND	\$34,727.71		\$34,727.71
4/1/2013	RUSSELL	RUSSELL COUNTY EMERGENCY SHELTER FUND	\$4,001.59		\$4,001.59
11/13/2012	RUSSELL	RUSSELL COUNTY -GOD'S FOOD PANTRY FUND	\$7,194.52		\$7,194.52
4/1/2013	RUSSELL	RUSSELL COUNTY HABITAT FOR HUMANITY FUND	\$2,699.55		\$2,699.55
5/6/2016	RUSSELL	RUSSELL COUNTY HIGH SCHOOL ALUMNI SCHOLARSHIP FUND	\$1,574.49	\$6,528.08	\$8,102.57
2/29/2016	RUSSELL	RUSSELL COUNTY HONOR GUARD	\$1,061.97		\$1,061.97
11/19/2012	RUSSELL	RUSSELL COUNTY WOMEN'S CIRCLE FUND	\$13,991.95		\$13,991.95
12/13/2013	TAYLOR	DURHAM SCHOOL LEGACY	\$4,727.44		\$4,727.44
8/5/2013	TAYLOR	TAYLOR COUNTY WOMEN'S CIRCLE OF HOPE FUND	\$2,009.59		\$2,009.59
2/29/2016	TAYLOR	CAMPBELLSVILLE/TAYLOR COUNTY COMMUNITY DEVELOPMENT GRANT FUND	\$9,402.89	\$1,050.00	\$10,452.89
2/29/2016	TAYLOR	GEORGE AND JOAN HOWELL ENVIRONMENTAL EDUCATION SCHOLARSHIP FUND	\$5,142.77	\$5,000.00	\$10,142.77
9/8/2017	TAYLOR	TAYLOR CO. HIGH SCHOOL ALUMNI SCHOLARSHIP FUND	<u>138.76</u>		<u>138.76</u>
			\$323.716.45	\$26,142.57	\$349.859.02

2017 2017 Donors

The following individuals/organizations made donations in 2017 to the Foundation and its funds:

360 Dr. Monin Car Show 360 Motorcycle Challenge 360 Orienteering Challeng 360 Super Hero 5K 360 WALC Debra Aaron Nancy Abbott Lavonne Adams Tonya Adams Tommye Allen Jamie Anderson Judge Mike Anderson Willis Anderson Ballou & Stotts Funeral Home Phillip Combest Bank of Jamestown **Brentley Bault** Cindy Bell Hula Bell Chari Bennett Jeannine Bennett Ivan Bennett Edra Bernard Glenna Bertram **Richard Blair** Bernita Blair **Mike Blevins** Tonya Bloyd Bluegrass Oxygen, Inc Nancy Boland Donna Branham Joan Britnell Sara Brown **Doris Brown** Nancy Buchanan Sharon Bunch Jordan B. Burks Jennifer Burton Barbara Campbell Campbellsville University Tina Capshaw Jennifer Carnes Ralph Carrender

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2017

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2013 Donors

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Honoring:

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Auctions, jail and bail events, bean and chili lunches, The Harlem Ambassadors basketball game, and donations in the amount of your graduation year helped increase LAF funds.





Donate the year of your graduation to a scholarship fund. Encourage your graduation classmates to donate also.





Those interested in the Russell County High School Alumni Scholarship Fund plan for the Harlem Ambassadors Fundraiser.

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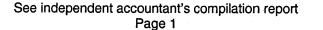
To the Board of Directors of Lake Area Foundation, Inc.

Management is responsible for the accompanying financial statements of Lake Area Foundation, Inc. (a nonprofit organization), which comprise the statements of financial position as of June 30, 2016 and 2015, and the related statements of activities and cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, a conclusion, nor provide any form of assurance on these financial statements.

Management has elected to omit substantially all the disclosures required by accounting principles generally accepted in the United States of America. If the omitted disclosures were included in the financial statements, they might influence the user's conclusions about the Organization's financial position, changes in net assets, and cash flows. Accordingly, these financial statements are not designed for those who are not informed about such matters.

Campbell, Myers & Ratledge, PLLC

Glasgow, Kentucky September 27, 2016



410 South Broadway * Glasgow, Kentucky 42141 * Office: 270.651.2163 * Fax: 270.651.6677 * www.cmr-cpa.com

LAKE AREA FOUNDATION, INC. STATEMENTS OF NET POSITION June 30, 2016 and 2015

ASSETS:	<u>2016</u>	<u>2015</u>
Cash and cash equivalents	\$61,867	\$100,222
Investments, by funds:		
Adair County Women's Circle	3,906	3,727
Clinton County Women's Circle	2,400	2,392
Pulaski County Women's Circle	5,746	5,479
Taylor County Women's Circle	1,838	1,756
ARC Pregnancy Center	2,258	2,000
Albany Volunteer Fire Department Fund	4,629	4,403
Bethany House Spouse Abuse Shelter	11,302	10,876
Casey County College Operating Fund	2,366	2,253
Durham School Legacy Fund	2,595	917
Lindsey Wilson College Fund	25,262	23,912
Russell County Development Fund	21,903	11,108
Adair County Courthouse Preservation Fund	3,475	3,303
McCreary Christian Fund	2,681	2,438
Pat Bell Administrative Fund	22,769	14,190
Russell County Women's Circle	10,833	6,750
Lake Cumberland Area Development Fund	54,626	23,662
Russell County-God's Food Pantry Fund	4,742	4,530
Russell County Habitat for Humanity Fund	2,463	2,327
Russell County Emergency Shelter Fund	2,401	2,274
Lake Cumberland Childrens Advocacy Fund	4,196	2,080
Masselink Beautification Fund	3,008	2,748
Esther House	2,301	2,293
Linda Hatter Scholarship Fund	2,314	2,202
We Care of Cumberland County	2,511	
Russell County Honor Guard	502	
Campbellsville/Taylor County Community Dev.	2,008	
Lake Cumberland Senior Services Fund	<u>19,320</u>	
Total Investments	<u>224,355</u>	<u>137,620</u>
Pledges receivable	<u>153,984</u>	<u>135,126</u>
Total assets	<u>\$440,206</u>	<u>\$372,968</u>
NET ASSETS:		
Unrestricted		
Designated for specific purposes		\$178
Permanently restricted	440,206	372,790
	. 10,200	0.2,100
Total net assets	\$440,206	\$372,968

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LAKE AREA FOUNDATION, INC.

STATEMENTS OF ACTIVITIES For the Years Ended June 30, 2016 and 2015

LAKE AREA FOUNDATION, INC.

STATEMENTS OF CASH FLOWS

For the Years Ended June 30, 2016 and 2015

REVENUE AND SUPPORT: Contributions Unrealized Gains Investment income Other income Total revenue	2016 \$102,963 2,287 4,063 <u>342</u> 109,655	2015 \$89,453 6,824 259 <u>3,093</u> <u>99,629</u>	Cash Flows From Operating Activities: Increase in Net Assets Adjustments to reconcile increase in net assets to net cash provided by (used in) operating activ- ities: (Increase) decrease in:	<u>2016</u> \$67,238	<u>2015</u> \$83,183	
EXPENSE: Program Services: Donations Supporting Services:	26,011	9,520	Pledges receivable Net Cash Provided from Operating Activities	<u>(18,858)</u> <u>48,380</u>	<u>(12,376)</u> <u>70,807</u>	
Accounting Supplies and administrative	1,200	1,200	Cash Flows From Investing Activities:			
expenses	<u>15,206</u>	<u>5,726</u>	Purchase of Investments	(82,672)	(20,973)	
	<u>42,417</u>	<u>16,446</u>	Interest and dividends reinvested Net cash used in investing activities	<u>(4,063)</u> <u>(86,735)</u>	<u>(259)</u> 21,232	
Change in net assets	67,238	83,183				
NET ASSETS BEGINNING OF YEAR		<u>289,785</u>	Net Change in cash and cash equivalents	(38,355)	\$49,575	
			Cash and Cash Equivalents-Beginning Year	<u>100,222</u>	<u>50,647</u>	
NET ASSETS END OF YEAR	<u>\$440,206</u>	<u>\$372,968</u>	Cash and Cash Equivalents-End of Year	<u>\$61,867</u>	<u>\$100,222</u>	
See independent accountant's compilation report			See independent accountant's compilation report			

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LAKE AREA FOUNDATION, INC. SELECTED INFORMATION June 30, 2016

Selected Information:

Substantially all disclosures required by Accounting Principles Generally Accepted in the United States of America are not included.

Statement of Purpose:

Lake Area Foundation, Inc. (the Organization) is a not-for-profit organization exempt from federal income tax under Section 501(c)(3) of the U.S. Internal Revenue Code. The Organization was organized exclusively for charitable and educational purposes. The mission of the Organization is to encourage philanthropic giving by providing an accessible means for contributions to be made to permanent endowments that benefit charitable concerns related to community and economic development, education, health and human services, the arts, public recreation and civil beautification. Grants shall be made for the purpose of improving the quality of life in our communities and leaving a legacy for upcoming generations to build upon. The service area shall include Adair, Casey, Clinton, Cumberland, Green, McCreary, Pulaski, Russell, Taylor and Wayne counties in Kentucky, and other geographic areas of the state recommended for inclusion by the Foundation Board of Directors.

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