The Union City Community Foundation’s 2015 Annual Report

What's Your Gift?
Letter From The Chairman

The Union City community has a great deal of wonderful people who truly care about one another. We are always ready to help in time of need and we continually surpass the odds of success. Over the years, we continue to build to become a more focused and energized community.

I am pleasantly amazed at the generous individuals from the Union City area. These dedicated individuals are willing to give their unique gift: volunteer of time, abilities, or their financial resources. The volunteers are willing to give for cause when called upon. All of these are valuable gifts, which help build a much stronger community.

Currently we are in the process of creating the Ottaway Legacy Society so that giving individuals can designate their financial resources in their estate planning, wills, trusts, IRA/401K, annuities, or life insurance policy. This will protect and preserve the vitality of our Union City Community. By joining, members agree to be listed in the Union City Community Foundation Annual Report and other publications. Amounts are anonymous and have no minimum! It is our goal to help you learn more about this opportunity and most importantly….joining will be simple.

You can provide a permanent gift by creating your personal named fund or by donating to an existing fund…this is truly a gift that keeps on giving!

Please contact: Susannah Frigon, Vice President of Investor Relations of The Erie Community Foundation SfRigon@eriecommunityfoundation.org or by phone 814-454-0843 Ext. 105

As a board, we strive to improve the visibility and effectiveness of the Union City Community Foundation. Your gift will be a legacy that will benefit future generations in making your dreams become a reality.

Your continued support is crucial to our community’s future success!

Please contact me with any further questions you may have about your Union City Community Foundation.

Thank you,

R. Steven Jones, UCCF Chairman
steve@ronjoneshardwood.com
814-438-7622
2015 Funded Organizations

Camp Halo / Doorkeepers Christian Outreach – Camp Shoes
Eligin Beaverdam Hose Co – Gas Detection Equipment
Amanda’s Notary / Grady’s Decision – EGGStravaganza
Lions Club – Pavilion Landscaping & Christmas Lights
Lunch with Santa / UCASDF – Food and Gifts
Main Street Art Center / UCASDF – Web and Internet
St. Vincent Outpatient Center – Building Upgrades
Union City Area School District Foundation – Security Upgrades
Union City Area School District Foundation – Visual Arts Cameras
Union City Family Support Center – Infrastructure Improvements
Union City Healthy Youth Club/UCASDF – Club Marathon
Union City Police Department / UCCHA – Tasers
Union City Pride, Inc. – Higby Building
Parks & Recreation / Union City Pride, Inc. – PLAY Camp
Union City Prom to Dawn / UCASDF – 2015 Prizes
Union City Public Library – Computer Purchase
Union City Public Library – Pre-K Transportation
United Way of Erie County— Erie Free Taxes

24 Scholarships totaling $17,500

Total Grants $65,337.84
**Statement of Financial Position**
as of December 31, 2015

**ASSETS**
Cash and Investments $3,387,517
Total $3,387,517

**LIABILITIES**
Grants and Accounts Payable $27,508
Total $27,508

**CHANGE IN NET ASSETS**
Decrease in Net Assets $(210,498)
Beginning Net Assets $3,570,507
Ending Net Assets $3,360,009

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**Statement of Revenue, Expenses and Grants Paid**
for the Year Ending December 31, 2015

**REVENUES**
Public Support - Gifts and Bequests $14,199
Net Investment Income $(57,579)
Other Income $1,405
Total $(41,975)

**EXPENDITURES**
Grants and Awards $110,621
Administrative and Development Expenses $39,243
Fees to Investment Managers $18,659
Total $168,523
“I Believe” Award

In 2009 we instituted what has become an annual “marquee” award to honor individuals, group and organizations that work to make the Union City area a better place to live. The idea of the award is to honor anybody who steps outside of the box and does what they have to do to make our community a better place to live, work and raise a family.

2016 - Larry Obert

2015 - Union City Downtown Development

2014 - Dr. Rogelio Allanigue

2013 - Union City Pride, Inc.

2012 - Christopher Lash

2011 - Union City Volunteer Fire Department

2010 - Mark Webb

2009 - Union City Little League
Create Your Legacy

Through The Union City Community Foundation, you can create a personal philanthropic legacy tailored to your specific needs and interests. Funds may be established during your lifetime or by bequest in your will. Grants are then awarded to your favorite charities in the name of the fund, forever.

Unrestricted Funds are ideal funds if you have broad charitable interests and a vision for the future. If you choose this fund, you offer The Union City Community Foundation maximum flexibility to respond to the changing needs in the community.

Donor Designated Funds are created to perpetually benefit one or more specific charities of your choosing. Grants will be made in the name of the fund so long as the organization remains in operation and is consistent with its original charitable purpose.

Donor Advised Funds are an attractive alternative to the creation of a private foundation because your donor advised fund receives a 100 percent tax deduction for your original and any future gifts. In future years, you may suggest deserving charities to benefit from fund income, or, if desired, principal. Grants are then made in the name of the fund to your favorite charities.

Geographic Funds are designed for when your charitable interests are limited to a particular geographic area within Erie County.

Scholarships Funds support students who are attending or graduating from a particular school or studying a specific subject. Each scholarship is unique. You can design your scholarship fund in memory or in honor of a loved one with specific parameters.

Field of Interest Funds are perfect if you wish to support a particular broad charitable cause, such as education, the arts, health, environment, human services or community development.

Pass-Through Funds allow a gift to The Union City Community Foundation to "pass through" to your favored charity. This may be appropriate when you want anonymity, or when unique property is used to make a gift.

Annuities and Trusts are available, at no cost, to organizations with Agency Endowments. We also have significant experience with charitable remainder and lead trusts. These planned giving alternatives often create beneficial situations for both you and your favorite nonprofits.

How to include the Foundation in your will A bequest to The Union City Community Foundation is simply including us in your will or estate plans. Your legal counsel may include language similar to the following:

“I give, devise and bequeath the following:

(Describe assets that are the subject of the bequest: for example, a stated sum, the residue of the estate, or a percentage of the residue of the estate.)

to the Union City Community Foundation, a Pennsylvania nonprofit corporation. This gift shall be known as the ___________________________ Fund.”

(the name you choose)

If it is desired that the bequest be applied to an area of charitable interest or to specific organizations, add “this Fund shall be devoted to the support of ____________________________.”

(name of favorite charity)
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<tr>
<th>BOARD OF TRUSTEES—2016</th>
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<tr>
<td>R. Steven Jones, Chairman</td>
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<tr>
<td>Diane Bowes, Secretary</td>
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<tr>
<td>Dr. Rogelio Allanigue</td>
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<td>Pat Burgess</td>
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<td>Gerald Eddy</td>
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<td>Ronald O. Jones</td>
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<td>Jim Shreve</td>
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<td>Mark Webb</td>
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<td>Richard Mason - Emeritus Class</td>
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<td>Norman Troyer - Emeritus Class</td>
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<td>Kaylynn Ostergard, Administrative Assistant</td>
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Dedicated to serving the people of the Union City area.

P.O. Box 512
Union City, PA 16438
(814) 438-7622
www.UnionCityCF.org

**Affiliated with the Erie Community Foundation**

A copy of our official nonprofit registration may be obtained from the Pennsylvania Department of State by calling toll-free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.