



Giving Back

with the Battle River Community Foundation

Volume 10, No. 3

Camrose, Alberta

December 2008

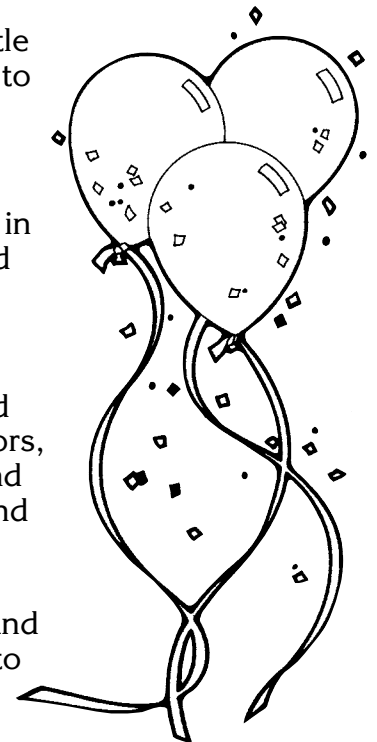
We've reached the million dollar mark!

It's official! By the end of the current round of grant allocations, the Battle River Community Foundation will have granted over one million dollars to worthwhile community projects throughout east central Alberta.

The Battle River Community Foundation Board is very pleased to have reached this significant milestone within thirteen years of granting. This achievement is due, in large part, to the enthusiastic and generous way in which the people of this area have embraced the Foundation and helped build its asset base.

"We're very honoured by the strong support we've received," says Foundation Board Chairman Blain Fowler. "We're very proud to have been able to provide one million dollars in support of worthy causes and projects within east central Alberta." He adds, "Thanks to the local donors, we've been able to support everything from educational scholarships and health care equipment purchases to parks, campgrounds, cemeteries and playgrounds; from firefighting gear and suicide prevention materials to important programs in support of children at risk."

"Our Foundation has benefited individuals, families and communities. And we're moving full steam ahead, in order to continue to grow our assets to meet community needs."



What is a legacy gift?

"Planned giving" or "legacy giving" allows a donor to build charitable purpose(s) into his/her overall financial, tax and estate planning goals. Any donor can plan a legacy gift regardless of current assets or income. A legacy gift is a living reminder left by individuals and/or families who have strong charitable goals allowing them to support the causes they believe in – now and forever.

A donor may speak to his/her financial planner, lawyer and/or family to consider the range of possibilities associated with this type of gift. They may be in the form of:

- * Life insurance
- * Charitable remainder trust
- * Bequest

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A letter from the Chairman of the Board



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Dear Friends and Supporters:

Some of you have been asking how the current global economic situation is affecting the Battle River Community Foundation.

It won't surprise you to hear that, although the Battle River Community Foundation has widely diversified investments, we are not immune to the effects of the current upheaval in the financial world.

As an organization stewarding funds in perpetuity, we have stellar investment practices and rigorous financial management policies that assist us to weather storms such as this one. The Battle River Community Foundation is well positioned to thrive in the long run.

However, the volatile market situation has negatively impacted our 2008 returns. After thirteen very successful years we are facing the very real possibility that our ability to make grants will be severely diminished for 2009.

Dropping stock prices do not mean a corresponding drop in social and community needs. In fact, we are worried about the consequences some of our community's very vulnerable citizens could face if we are not able to fund projects at our usual level next year. If you, as a donor, would like to add to your fund on a flow-through basis, to ensure continued support for these organizations, please let us know.

Our investment strategies will see us through this period of instability, never fear. In the meantime, please don't hesitate to contact us if you'd like information, clarification or to help ensure our communities continue to receive support in these challenging times.

Yours truly,

Blain Fowler
Chairman

A family that earns and gives together

The Mayer family of Camrose believes strongly in giving back to the Community.

In fact, Norm, Betty and James, the owners of Central Agencies, say their insurance and real estate business has been treated well by local residents over the years and they always want to support the communities that have supported them.

The Mayers have long been known as generous financial contributors to charities and projects, as well as for giving generously of their time, to serve as coaches and on committees or boards. Following nine years as an alderman, Norm was Mayor of Camrose for an additional fifteen years. James currently serves on the Battle River Community Foundation board.

Norm was also part of the initial group of local residents who worked with the late Louise Jensen to get the Foundation started in the early 1990s.

“We wanted a vehicle for local people to be able to support the community,” Norm recalls. “The idea of an organization whose mandate allowed us to do that in perpetuity was very meaningful. We bought into the theory as a community. As business owners and as a family we decided that if it was good for others it was good for us, too.”

“Lots of fundraising is project specific,” James explains, “but the Foundation is going to be here for the long term, supporting the community in whatever way is necessary. That appeals to me.” James and Val Mayer specifically support the Administration Endowment Fund, because they understand that there are costs associated with running the organization.

Both Central Agencies and the Mayer family have expanded since Norm and Betty started out forty-five years ago. “We started with zip in 1963,” Norm recalls. “Now we’ve grown to have a good business and many, many local clients. There are not a lot of local projects that we don’t support.”

James came on board in 1983 and his wife,



James, Betty and Norm Mayer with an award received at the Small Business banquet in October.

Val, has contributed on a part-time basis since 1994. Older son Bruce, who works with the Alberta government, has three children. James and Val have two children. Their oldest child, Matt, is now studying real estate, in order to join the family firm.

Norm says, “we live here, work here and raise our family here. Those are pretty good reasons to help grow our community, don’t you think?”

And how do these generous donors feel about the current economic downturn?

“This downturn is not a reason to quit supporting the Foundation,” says Norm. “In fact, the downturn means societal needs are increasing. Giving organizations such as this one are more important than ever.”

“The economy is cyclical,” he adds. “I’ve been around long enough to have seen this kind of thing before. A long term investment in the Foundation is patient money – it’s going to be there when the economy comes around.”



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A successful season of Community Builders' dinners

The Battle River Community Foundation has hosted three very successful Community Builders dinners this fall, in the communities of Camrose, Loughheed and Killam.

Each dinner has been held to celebrate the contributions of people who have dedicated years of time to improving their community and their world.

Bitz O'Riordan, long-time owner of Hi-Way 13 Transport, was honoured in Camrose on October 17. Now in his 80s, Bitz has a long history of supporting local causes.

The Losness family, whose roots in Loughheed stretch back more than 100 years, was celebrated in that community on November 15. Herb Losness served as Mayor for eight years, as well as being active in many organizations and projects. He and his wife, Eunice, also owned an insurance business and ran the ATB Financial. Although Herb passed away in 1983, Eunice is still an active community senior. Also celebrated was Herb's brother, Sonny, who also served as Mayor, in addition to owning Losness Drilling.

On November 29, in Killam, community volunteer Gordie Enghoj was the centre of attention. Local residents were thrilled to celebrate this tireless contributor, who has inspired an entire community. Left partially paralyzed and unable to speak by polio at age two, Gordie is now 78. He has dedicated countless hours to the Town of Killam, most especially at the local arena.

Between these three special evenings, more than \$100,000 has been added to the assets of the Battle River Community Foundation and new funds have been set up in the name of each of these groups of Community Builders. Income from these funds will be used to support projects in the local areas forever!



Bitz O'Riordan



Herb Losness



Eunice Losness



Sonny Losness



Gordie Enghoj