

# INDIANA 4-H FOUNDATION

Spring 2017

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## Indiana 4-H Foundation, Inc

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*The Indiana 4-H Foundation provides resources that give the opportunity for all Indiana youth to develop life skills that benefit their communities.*

### Partnered with:

*Purdue Extension Specialists and county-based Extension educators who deliver 4-H youth development educational programs to over 200,000 Indiana youth.*

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*Director of Purdue Extension & Associate Dean of Purdue College of Agriculture*

Dr. Renée McKee,  
*Assistant Director of Purdue Extension & Indiana State 4-H Program Leader*

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## INDIANA 4-H YOUTH GRATEFUL FOR TRIP TO DC FOR INAUGURATION DAY

Your gifts on Giving Tuesday 2016 made this possible!

The Indiana 4-H Foundation's Giving Tuesday campaign helped to raise \$10,000 to send ten Indiana 4-H youth and their chaperones to Washington, D.C., for the 2017 Citizenship Washington Focus Presidential Inauguration. Thanks to many generous donors, these youth were able to have the experience of a lifetime. Indiana 4-H selected 10 4-H members from across Indiana, based on essays and personal interviews, to represent their peers at this "first of its kind" 4-H Inauguration event.

This event was designed for high school aged 4-H members from across the country and provided a variety of educational workshops.

Youth and adult chaperones also toured our nation's capital and experienced Inauguration Day events including the Oath of Office, Presidential Inaugural Address, Inaugural Parade and Inaugural Ball Dinner and Dance Cruise.

### Program participants:

- Learned the meaning and importance of the Democratic process
- Explored the history of the Presidency, the election process, and the role of the press
- Discovered the intricacies of the Executive Branch and careers in politics
- Practiced citizenship through service, civic education, and engagement

**"I would like to say thank you to the Indiana 4-H Foundation for giving us the rare opportunity to see the Presidential Inauguration. I am going to be taking away a ton of experience from this. I learned a lot about our nation's capital and I got to witness one of the most historic events in American history."**

*—Daniel Jones, Lake County*

# LEAVE YOUR MARK ON INDIANA 4-H

## *Advice on Planned Giving*

Each of us has many unique opportunities to help causes and people that we care about, and equally importantly, to leave a legacy. Planned giving through an estate plan can be one way to do so.

My grandfather was a 10-year member of 4-H and a 47-year volunteer. He farmed and raised hogs for over 50 years. To this day, his 50-year commemorative wooden clock from the Woodford County, Illinois 4-H (an organization that he chaired for many years) sits proudly on my mantle. Only years later did I discover that he didn't just teach me the power of generosity from the memento left to me, but that he left money to the Woodford County 4-H in his will. My grandfather didn't have knowledge of the 4-H Foundation then. Now, we all have the benefit of the 4-H Foundation and the ability to consider planned giving in an organized and tax-deferred fashion. The Indiana 4-H Foundation is a part of my estate plan because of what I learned from my grandfather.

### ***What Is Planned Giving and Does It Come at the Expense of My Family?***

Planned Giving can be an important part of any estate plan. Planned giving does not have to come ahead of ensuring the financial security of loved ones or prudent transfers of hard-earned assets and real estate—it is a partner in this process. It can fill the vital need of being a source for funds when contingencies occur, as well as assisting in tax-deferred estate planning mechanisms.

Charitable giving does not have to be a stand-alone process. Rather, when supporting charities is among a person's goals, they can incorporate their charitable giving into their larger overall plans, through planned giving.

For those of us that have benefitted so much from 4-H over the years, aspects of planned giving can both benefit

the Indiana 4-H Foundation and the donor/member. In addition to the tax benefits, the donor gets the comfort of knowing that she has provided a lasting legacy to the charity of her choice.

### ***Do You Even Need an Estate Plan?***

A well-crafted estate plan should provide for your loved ones in an effective and efficient manner by avoiding guardianship during your lifetime, probate at death, estate taxes and uncertainty and unnecessary delays. Not to mention that a comprehensive estate plan provides for a Living Will, Power of Attorney, and a Special Durable Power of Attorney for Health Care and Appointment of Health Care Representative.

Most Hoosiers think an estate plan begins and ends with having a will executed—but the process is much more beneficial if legal documents are put into place in advance that aid your loved ones in dealing with medical providers if you become ill as well as the power to address your financial matters if you become ill. The focus of your loved ones should be on spending time with you, not dealing with banks and hospitals and filling out forms.

Of course, you should consult a qualified estate planning attorney to review your family and financial situation, your goals, and to explain the various options available to you. Most of our clients tell us that once their estate plan is in place, they have peace of mind knowing that they have provided for themselves and their family in case the worst happens. And we find that most clients have beloved causes that they wish to support—both to aid these causes financially and to leave a legacy.

### ***Should Planned Giving Be Part of My Estate Plan?***

There are many different varieties of planned giving, including: planned gifts to charity during one's lifetime,

leaving gifts to charity in one's will and the use of charitable trusts (such as a Charitable Lead Trust or a Charitable Remainder Trust).

There are unique rules and legal issues present when it comes to charitable giving that can create some special opportunities for tax and financial benefits in relation to such giving. Doing it right is crucial to ensure that all appropriate tax benefits are obtained and to ensure that your wishes are honored. People often ask, "Do I have to just pick one charity?" No. Clients often choose their place of worship, organizations where they were members or volunteers, educational institutions or a combination of charitable entities.

Planning your charitable giving in connection to an overall estate plan helps ensure that your charitable giving strategy is consistent with your goals and personal passions, but also with your overall goals for what to do with your wealth. It is not at the exclusion of providing for the financial security of loved ones.

### ***How Is Planned Giving Accomplished?***

As with other aspects of estate planning, when incorporating planned giving into your estate plan, the specific details (such as what type of planned giving is decided on and what particular terms end up being set for such decided-on charitable giving mechanisms) matter greatly. These details can impact whether the planned giving will have the impacts that you want, or will instead have unintended consequences.

### ***Planned Giving Takes Many Forms:***

The most basic way to remember a charity in your estate plan is through the use of a specific bequest in your will. A specific bequest in a will may read, "I hereby give and devise the sum of (dollar amount) to (the charity of your choice)." A specific bequest



**EDUCATOR SPOTLIGHT:  
ROGER SHERER**  
WELLS COUNTY

**Roger Sherer, Extension Educator in Wells County, has truly felt the impact of 4-H throughout his entire**

life. Originally from Noble County, Roger grew up on a farm with his siblings where his mother, a former 4-H member, encouraged her children to be active participants of the program. As a 4-H youth, Roger was dedicated to making his best better. After being elected Health and Safety Officer of his Junior Leaders, Roger remembers the time and devotion that he put into his position, ultimately cultivating a love and passion for 4-H. When Roger was selected as one of the eight national finalists for his completion of the 4-H Achievement Record Book (similar to the Accomplishment Resumé Scholarship today), he was thrilled. As one of the national finalists, Roger was given a scholarship and the opportunity to attend the National 4-H Club Congress. To this day, the opportunity remains vivid and valuable to his 4-H experience.

Dick Reel, the Extension Educator in Noble County at the time, was a role model for Roger. Because of him, Roger felt drawn toward becoming an Extension Educator. He couldn't believe that such a career was possible. After completing his 10 years of 4-H, Roger made the decision to attend Purdue University where he studied Animal Science and Agriculture

Education, in hopes of becoming an Extension Educator or an Agriculture Education teacher. Roger said, "[4-H] helped me to get an idea of a career goal and it led me to attend Purdue, which ultimately led me to my career."

Today, Roger is inspiring youth in the same way that he was inspired as a 4-H member. While 4-H has changed since he was a member he says, "We're doing more projects, more science related subjects, and youth can still find something in 4-H that might interest them." He believes that 4-H is broad and opening up the doors to deliver possibilities for people of all interests, passions, and backgrounds. While 4-H still provides opportunities in livestock, foods, and sewing, Roger says it is also providing new opportunities in areas such as robotics and fluid power that allow youth to broaden their perspective and try new things..

**"[4-H] helped me to get an idea of a career goal and it led me to attend Purdue, which ultimately led me to my career."**

*—Roger Sherer*

***Advice on Planned Giving***  
*(continued from page 2)*

could also take the form of leaving real estate, artwork, coins, or other property.

Most clients prefer utilizing a trust in their estate plan to achieve tax benefits and to provide specific directives on the timing of distributions of their assets and the treatment of real estate. A well drafted trust ensures that donor's needs are met, including calculating and issuing payments, preparing and filing tax forms, and providing reports on investments. Trusts

provide many benefits in an estate plan, including an independent trustee to administer assets as well as achieving tax savings and ensuring that real estate is transferred in a manner consistent with your wishes. Trusts are also an ideal place to consider planned giving. Many strategies exist for planned giving trusts. The options include charitable remainder trusts, charitable gift annuities, charitable lead trusts and pooled income funds.

For those clients who have a desire to leave a legacy via planned giving, planning giving trusts are a common vehicle for accomplishing a client's goals. Utilizing a trust to effect planned giving also allows one to benefit a charitable organization or cause. Your estate plan can provide for such organizations in a variety of ways, either during your lifetime or at your death. Depending on how your planned giving plan is set up, it may event let you receive (continued on Page 9)

# 4-H ALUMNA HONORS FATHER WITH GIFT

## Tribute Donation Makes Lasting Impact on Indiana 4-H Youth

A long-time 4-H member, June Ladd not only reaped the countless benefits of the Indiana 4-H program throughout her life, but has effortlessly sowed them as well.

June has made many generous contributions to the Indiana 4-H Foundation, but the most meaningful to her is starting a scholarship in her father's name.

"I decided I wanted to do something for my dad that would be there long after I'm gone, so that his name would still be out there, being remembered," she said. "He worked really hard all his life and was just a really great, wonderful, warm person."

Raised on a farm, June takes pride in her humble beginnings as a 4-H member in Grant County,

Indiana. While June loved having the opportunity to participate in 4-H projects, such as showing her Holstein cows, throughout her 10 years in 4-H. It is the life skills, family, friendships, and community that she has cultivated that sit at the forefront of her mind still today. "It means family, friends, growing up with a good life, good people, good standards, and morality," she said in talking about 4-H. "It was a way to get together with people, a community thing. It kept you in touch with your friends and you could meet new people."

This past fall, June's donation to the Giving Tuesday campaign helped send 10 kids to Washington, D.C., for the Presidential Inauguration. "What an opportunity. Can you imagine the

once-in-a-lifetime opportunity it is to see how our government works? Just to be there, so few people get that chance," she said, excited.

As June reminisces on her life and her years spent dedicated to the 4-H program in Indiana, she looks to her father as the spark of that dedication. For June, giving back to the youth within the 4-H program today is a way to honor what her father did for her. "There isn't a day that goes by where I don't think about how lucky I am to have had the dad I had because he really brought us up well, and I miss him a lot. This is just something so small and insignificant, but I wish I could do more. I love 4-H. I can't tell you all the good times I had with people and the camaraderie."



*We want to say thank you! Join us at the*

### **2017 ANNUAL MEETING & DONOR APPRECIATION LUNCH**

**FRIDAY, APRIL 28 | 10AM TO 2PM**

*Sign up today at [www.in4h.org](http://www.in4h.org).*

*generously hosted by:*



**SUBARU of INDIANA AUTOMOTIVE, INC.**

5500 IN State Road 38, Lafayette, IN 47905

*Watch demonstrations on Science, Healthy Living, & Citizenship from our own 4-H youth, OR take an in-depth tour of the Subaru of Indiana Automotive, Inc. facility.*

## **SUBARU CREATES STEM LEARNING OPPORTUNITIES FOR 4-H YOUTH**

In an effort to increase interest in STEM careers through hands-on learning opportunities, Subaru has partnered with the Indiana 4-H Foundation to provide STEM kits to several counties across West Central Indiana. New to the 4-H program within Indiana, SPARK clubs are being formed to provide this educational instruction and help youth

who are interested in STEM. Including learning materials such as 3D printing pens, Edison robots, makey makey's, and simple household items, STEM kits are providing opportunities for 4-H members to creatively learn the engineering design process. With the help of passionate 4-H volunteers and active funding by Subaru, 4-H

members are building valuable life skills including decision making, problem solving, creativity, and teamwork. It is thanks to the support of Subaru that Indiana 4-H is capable of providing its youth with learning opportunities that not only stimulate growth, but also stimulate the belief that they can make the best better.



Booster Club members (left to right): Patty Keating, Leanita (Skeeter) Scott, Ruth Ambers, Marcia Wolff, Deb Fisher, Shelby Fultz, and President Curt Morrison. Not pictured: Amy Morrison

## LAPORTE COUNTY 4-H OPENS ENDOWMENT FUND

Back in the 1990's when I started with Purdue Extension, LaPorte County had a great partnership with the Indiana 4-H Foundation. As an educator, I saw the great things that the Foundation was doing to support programs on the state level, including scholarships for local students. Through the efforts of a great volunteer, June Lenig, we even received the Perfect Partnership Award in 1991.

I left Extension in 1998 to raise my young children and held three different positions during my hiatus. I worked for a local community foundation, started an afterschool program, and did development work at a private boarding school. Through these experiences, I came to learn more about endowment funds and how important they are in creating an organization's sustainability plan.

I always liked the quote attributed to Nelson Henderson that states, "The true meaning of life is to plant trees, under whose shade you do not expect to sit." When I came back to the 4-H program in 2005, I was determined to plant that tree. In a time of uncertain budgets, I wanted to create a future stream of income to make

sure that the 4-H program would continue in perpetuity.

Enter the 4-H Booster Club. We started the LaPorte County 4-H Booster & Alumni Association back in 1992 as a way to engage alumni and provide financial support for our programs. Through a small, but dedicated, core of volunteers, the Booster Club had a tremendous impact on the program. The funds they raised through plant sales, pie auctions, memberships and donations provided reduced fees for members to attend 4-H camp, incentives for members to attend Officers Training, new project display units for the fair, sponsorship of the 4-H Leader Hall of Fame, "Clover Grants" to fund specific needs, meals for judges during the fair, a poster contest to promote 4-H, and educational scholarships for seniors and alumni.

At one point, there was hope that a new building would be constructed on the fairgrounds for 4-H. The Booster Club decided to direct proceeds from their annual plant sale to this project. Year after year, the balance grew but the future of this building was uncertain. A new Extension Office was built that had a meeting room, which

alleviated some of the need for a new building. By this time, the Booster Club was sitting on a large balance. The money that they invested in funds and CD's had a poor rate of return and they knew that there had to be a better way to protect what they worked so hard to achieve. I encourage every Indiana county to consider an endowment with the Indiana 4-H Foundation if they do not have one.

**By opening an endowment fund through the Indiana 4-H Foundation, they were able to achieve three things:**

- 1. They were able to invest this money with a guaranteed rate of return much higher than what they were receiving elsewhere,**
- 2. The interest alone provides four scholarships each year, freeing up the club's other funds for immediate projects, and**
- 3. The dual-purpose agreement allows them to access the principal if a 4-H building ever comes to fruition.**

It is very easy to set up and their staff does all the work for you, including the promotion of your fund to potential donors. A great way to do this is to select a new or existing fundraising event and dedicate all the proceeds to the endowment fund. There is great satisfaction in watching that balance grow over time, knowing that you are providing shade for future generations.

*After 10 years as a 4-H member, and 20 years of service as a 4-H Youth Educator, Patty Keating is now a Community Development Educator in Porter County. She has recently applied to be a 4-H volunteer in LaPorte County.*

# 4-H TEENS BECOME TEACHERS TO YOUTH IN COMMUNITY



Teens as Teachers is a program that has equipped more than 500 high school students, in the areas of biotechnology, biosecurity, and healthy living, on the necessary skills to effectively teach younger youth within their community.

For the past six years, those who have participated in the Teens as Teachers program have given between 500 to 700 hours of their time to teaching these initiatives to younger youth within their communities. With 12 youth making up four teams, this year the Teens as Teachers program has focused on teaching nutrition and phys-

ical health initiatives. Angie Frost, Indiana 4-H Extension Specialist in 4-H Healthy Living says, "The Healthy Living Teachers are well-prepared and inspired, to lead younger youth down the path to a healthy and well-balanced life."

The generous \$4,500 given by Franciscan Health has helped to support a low cost for youth attendees as well as provide curriculum, supplies, and teaching kits that are given to the youth to use within their communities upon completion of the program. The youth that attend this program implement what they have learned in a multitude of places within their schools and communities, whether that be in their local 4-H Club, afterschool programs,

Spark Clubs, camps, the County Fair, Farmer's Markets, or other community events. Erika Bonnet, Indiana 4-H Extension Specialist in Science Initiatives says, "Teens who participate in this program learn not only subject matter, but also learn skills like communication, teaching to different age audiences, lesson planning, experiential learning, and other leadership skills." As a result of this program, youth broaden themselves to the endless opportunities they have in becoming a leader and teacher, within their community and world, no matter their background, field of study, or the dreams and passions they have set before them.



## SUPPORT INDIANA 4-H YOUTH WITH YOUR LICENSE PLATE!

Individuals all across the state of Indiana are steering their support for the 4-H program, mile upon mile, with the purchase of an Indiana 4-H Foundation Specialty License Plate.

The funds from these plates go directly to supporting programs for youth within Indiana, with a portion of the funds for each plate sold going directly to the 4-H program of the county in which it was purchased.

Hamilton County is a strong supporter of the license plate program. Kathleen Bohde, the 4-H Youth Development Extension Educator in Hamilton County says, "It's nice that the program gives back to not only the 4-H Foundation, but also to the county programs where we have the opportunity to assist our families in having a strong program at the local level too."

Hamilton County uses the funds they receive from the license plate program

in more ways than one. Whether that be to help sponsor 4-H families that may need a scholarship or sponsorship to cover their child's 4-H program fee costs and underwriting SPARK club initiatives to name a few. Hamilton County has seen the immense benefits of the program since the initiative began.

"It's so easy to do now at the BMV," Bohde said. "There's no additional forms, you just tell them that you want a specialty plate and it's all right there. It's so much easier than when the program first began, and we've seen that our numbers have risen due to that."

The Indiana 4-H Foundation Specialty License Plates are not only representing and promoting Indiana 4-H on the roads, but they are giving back to those who matter most in 4-H: the youth.

## Top Ten Counties for Plate Purchases



# 1	Marion.....	90
# 2	Hamilton.....	87
# 3	Elkhart.....	76
# 4	Tippecanoe.....	74
# 5	Hendricks.....	65
# 6	Johnson.....	64
# 7	LaPorte.....	49
# 8	Boone.....	48
# 9	Madison.....	47
# 10	Porter.....	43

## **Advice on Planning Giving** (continued from page 3)

a stream of income for life, earn higher investment yield, or reduce your capital gains or estate taxes.

Individuals may also consider establishing a charitable remainder trust for the benefit of the charity of their choice. By utilizing a charitable remainder trust, an individual places money or property in trust. The donor receives income from the trust for a term of years or for life, with the remainder of the trust assets going to the charity. In return, the donor is reducing the size of his/her estate, possibly reducing or eliminating estate taxes. In addition, there may be significant capital gains savings to the donor by donating highly appreciated property to the charity through a charitable remainder trust.

In addition to the use of bequests and trusts, donors may consider naming a charity as the designated beneficiary on a life insurance policy, annuity or retirement account. Finally, individuals can (i) name a charity as a contingent beneficiary in the event that their heirs have died before they do and/or (ii) name a charity as a percentage recipient of funds under a trust (for example, 1 percent).

*Mercho Caughey is a full-service law firm with experience in both agricultural law and estate planning and probate law. Mercho Caughey was named an "Indiana Best Law Firm by U.S. News & World Report" for 2016 and 2017 and its attorneys have been routinely recognized—including being recognized by being named as an Indiana Super Lawyer and well as on U.S. News & World Report "Best Lawyers in America."*

**[www.merchocaughey.com](http://www.merchocaughey.com)**  
317-722-0607

**Are you interested in making a planned gift to the Indiana 4-H Foundation? Please contact Shelly Bingle at [shellyb@purdue.edu](mailto:shellyb@purdue.edu) or call the office at (317) 445-7977.**

## **LEGACY SOCIETY**

*Planned Giving Donors  
\*Deceased members*

The following individuals have informed the Indiana 4-H Foundation of planned gifts—such as will bequests, life insurance policies, charitable gift annuities—they have pledged for the Foundation.

**Dr. Robert M. Abel\***

**Mr. and Mrs. Robert and Maurine Anderson**

**Mr. and Mrs. Steve and Deborah Bechman**

**Mrs. Hollie Bunn**

**Ms. Lorene Burkhart**

**Mrs. Lois Ellen Byers**

**Mrs. Christy Denault and Dr. Jeffrey Denault**

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**Jane Hildenbrand**

**Mr. and Mrs. Tom and Karen McKinney**

**Mrs. Deborah Myers-Cook and Mr. Ronald Cook**

**Mr. and Mrs. Jim and Judy Singleton**

**Mrs. Annie Watts Cloncs and Mr. Richard Cloncs**

**Mrs. Helen L. Witte**

**Ms. Pandora J. Woodward**

If you have made provisions for Indiana 4-H, please contact Shelly at (317) 445-7977 or [sbingle@purdue.edu](mailto:sbingle@purdue.edu).

## **2016 EMERALD CLOVERS**

*Gifts of \$5,000 or more in unrestricted funds during 2016*

Farm Credit Mid-America

Mr. and Mrs. Robert and Maurine Anderson

Mr. and Mrs. Steve and Deborah Bechman

Dr. and Mrs. Kerry and Betsy Keffaber

Mr. and Mrs. Mark and Julia McKinney

Mr. and Mrs. Tom and Karen McKinney

Mr. and Mrs. Ted and Julie McKinney

Mr. Thomas P. Murphy

## **2016 CRYSTAL CLOVERS**

*Gifts of \$1,000 or more in unrestricted funds during 2016*

Mr. and Mrs. R. Duke Aldridge

Marion County Farm Bureau, Inc.

Allen County 4-H Clubs, Inc.

Alice Chitty Revocable Trust

Mr. and Mrs. Jerry and Kathy Adkins

Mr. and Mrs. Adolph and Martha Altschaeffl

Ms. Sara K. Anderson

Mr. and Mrs. John and Harriet Armstrong

Mr. and Mrs. Charles and Marjorie Beasley

Mr. and Mrs. Lawrence and Glendia Beck

Ms. Michelle L. Bingle

Mrs. Lois Ellen Byers

Ms. Charlotte Carr

Mr. Richard Cloncs

and Mrs. Annie Watts Cloncs

Mr. and Mrs. David and Brenda Day

Mrs. Christy Denault

and Dr. Jeffrey W. Denault

Ms. Julie Eddleman

Mr. and Mrs. Brian and Kenda Friend

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Dr. and Mrs. Jason and Angela Henderson

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Mr. and Mrs. Larry and Susan Jordan

Ms. June Ann Ladd

Mr. and Mrs. Paul and Beverly Martin

Dr. Renee McKee and Mr. James McKee

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Mr. and Mrs. Benton and Ina Moore

Mr. and Mrs. George and Nancy Morton

Ms. Peggy J. Naile

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Mr. and Mrs. William and Terri Viar

Mr. and Mrs. Timothy and Bonnita Whicker

Mr. and Mrs. Robert and Dana White

Mr. and Mrs. Jeffrey and Holly Wooden

Mr. and Mrs. Steve and Anne Young

**For the full 2016 Donor Roll Call, please visit our webpage:**

**[www.in4h.org/2016donorlist](http://www.in4h.org/2016donorlist)**



## 2016 Matching Gift Challenge Results

Because of your commitment to Indiana 4-H, our 2016 Matching Gift Challenge raised \$104,924 in unrestricted funds. Unrestricted funds are used to support Foundation operations, to build capacity for the Foundation, and to appropriate more funding for new and expanded 4-H programs. Special thanks to Farm Credit Mid-America for their generous gift of \$25,000 to grow Indiana 4-H! The invaluable skills and life lessons 4-H teaches our Indiana youth will continue to positively impact communities statewide.



National Association of  
Extension 4-H Agents

NAE4-HA members are all professional educators working with state cooperative Extension programs who are part of each state's land grant university.

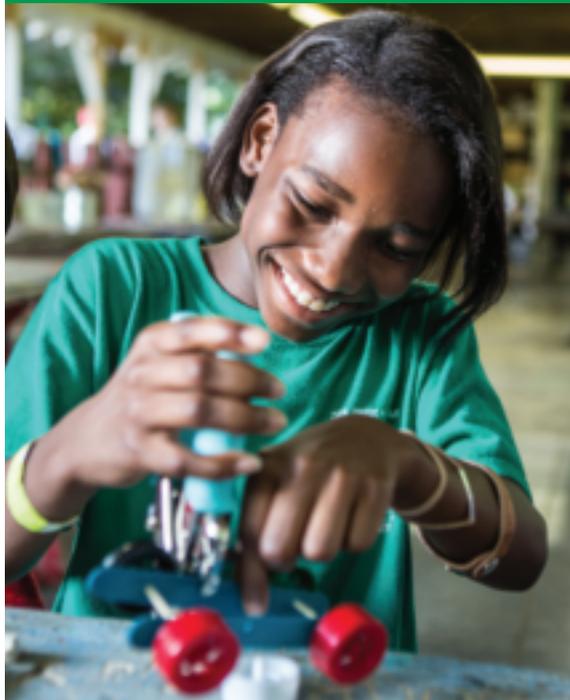
### 2017 ANNUAL NAE4-HA CONFERENCE

November 12-16, 2017

JW Marriott Hotel | Indianapolis, Indiana

### *Sponsorships Available for the Conference!*

If you're interested in sponsoring the 2017 Annual NAE4-HA Conference, please contact Shelly Bingle at [shellyb@purdue.edu](mailto:shellyb@purdue.edu) or call the Indiana 4-H Foundation office at (317) 445-7977.



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