



United Way of  
Indian River County

Responsibly Managed Since 1961  
**Community Impact Report**  
[ 2021-2022 ]



# MEET THE 2021-2022 TEAM

PAGE 1

Jeffrey Schlitt, *Chair*  
 Jeffrey Petersen, *Chair-Elect*  
 Dr. Katie Nall, *Secretary*  
 Margo Lind, *Treasurer*  
 Jeff Smith, *Past Chair*  
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 LaKisha Erwin, *At large*  
 Randy Riley, *Ex Officio*

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 Chris Ellis  
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 Rev. Benny Rhyant  
 Suzanne Seldes  
 Denise Smith  
 Caryn Toole

Meredith Egan  
*Chief Executive Officer*

Tracey Segal  
*Campaign Director*

Sarah Tucci  
*Marketing Director*

Nate Bruckner  
*Director of Community Impact*

Deana Shatley  
*Director of Community Impact*

Christian Pelaez  
*Director of Finance*

Sydney Mihailoff  
*Relationship Development Manager*

Stacy Benezra  
*Community Impact Coordinator*

Jacquelin Figueredo  
*Community Engagement Associate*

Monique Clark  
*Community Engagement Associate*

Your Part-Time Controller  
*External Finance Department*

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# A NOTE FROM LEADERSHIP

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## CHEERS TO 60 YEARS!

Since 1961, it's been our mission to improve lives by mobilizing the caring power of our community. Supporters like you have made that possible, and we're so glad you've joined us for the last 60 years! You've helped drive real, measurable change in our immediate area and neighborhoods where we live, work, and play. Your support, combined with thousands of others, is a robust investment in the future of our community. We cannot thank you enough!

With such a milestone achievement, we took a moment to reflect on our history, but we knew it was time to turn our focus to the future. With our Board's strength and passion, our organization's strategic goals came more clearly into focus. Not only did we move forward with our Strategic Plan, but we've been able to add more programs and expand our campaign with new workplaces and partnerships. We continue relentlessly toward our goal and couldn't have done that without our community. Our success is due to our collective diligence and drive.

We all thought this past year would be easier than the previous. However, finding success through another year of cancellations and constant changes all around us would not have been possible without your support. The people in our community are lucky to have you as their neighbors and friends.

We are so proud of where we have come and what has been accomplished, and know our brightest days are on the horizon. We hope you will join us on this adventure!

**Thank you,**

  
**Jeff Schlitt**  
 Board Chair

  
**Meredith Egan**  
 Chief Executive Officer

# IMPACT AT A GLANCE

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**To effectively address our community's most persistent problems, we must have an organized proven strategy.**

We're more than just a funder. United Way is the place where we can all make a bigger difference for those in need. With countless ways to give, advocate, and volunteer, we combine every gift to drive maximum impact in our fight for the Health, Education, and Financial Stability of every person in our community.

In 2021-2022, the Community Impact Fund provided grants to 45 programs that align with our goals. Through this fund, United Way confronts our community's biggest challenges to drive measurable results and lasting change.

## Through United Way funded partners and programs –

■ **2,514 individuals**  
were able to access  
mental health services

■ **27,462 individuals**  
had nutritious food

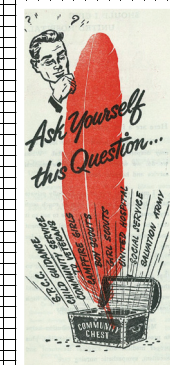
■ **4,308 individuals**  
in crisis received services  
within 48 hours of their request

■ **877 children**  
participating in United Way  
funded programs are  
developmentally on track

■ **659 children**  
enrolled in United Way funded  
programs have made significant  
gains in core academic subjects

# A GOAL FOR THE FUTURE

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## Strategic Plan Objectives: 2022-2024

■ **Ignite** our Community Impact Strategy to increase impact while cultivating a culture of learning and evaluation

■ **Expand** and diversify the range of supporters and deepen relationships to grow revenue

■ **Increase** brand awareness to make United Way of Indian River County a recognized, respected, and "go to" resource

■ **Enhance** operational excellence and strengthen our infrastructure



# COMMUNITY PARTNERS

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Total 2021-2022 Community Investment: \$1,798,068 –

- 211 Palm Beach and Treasure Coast
- American Red Cross, South Florida Region
- Big Brothers, Big Sisters of St. Lucie, Indian River & Okeechobee Counties
- Boys & Girls Clubs of Indian River County
- Camp Haven
- Catholic Charities of the Diocese of Palm Beach
- Childcare Resources of Indian River
- Children's Home Society of Florida, Treasure Coast
- Crossover Mission
- Drug Abuse Treatment Association
- Early Learning Coalition of Indian River, Martin & Okeechobee Counties
- Economic Opportunities Council of Indian River County
- Education Foundation of Indian River County
- Emergency Operations Command Center of Indian River County
- Environmental Learning Center
- Executive Roundtable of Indian River County
- Gifford Youth Achievement Center
- Hibiscus Children's Center
- Hope for Families Center
- Indian River County Healthy Start Coalition

# COMMUNITY PARTNERS

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■ Health: \$649,477 ■ Education: \$788,112 ■ Financial Stability: \$360,479 –

- Indian River Habitat for Humanity
- Literacy Services of Indian River County
- Mental Health Association in Indian River County
- Mental Health Collaborative of Indian River County
- Moonshot Community Action Network
- Redlands Christian Migrant Association
- SafeSpace
- Senior Resource Association
- Senior Collaborative of Indian River County
- SingleCare Prescription Discount Cards
- Substance Awareness Center of Indian River County
- The Arc of Indian River County
- The Learning Alliance
- Treasure Coast Community Health
- Treasure Coast Food Bank
- Treasure Coast Homeless Services Council
- Tykes and Teens
- United Against Poverty
- Veterans Council of Indian River County
- Visiting Nurse Association and Hospice Foundation
- Volunteer Income Tax Assistance/My Free Taxes
- Youth Guidance Mentoring Program



# YOUR INVESTMENT MATTERS

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**Donors continue to see the value of investing in United Way's strategic approach to local problems,** leading the way from quick fixes to real, lasting change. Individuals, businesses, corporations, and foundations supported UWIRC's effort to bring in nearly \$3 million in fiscal year 2021-2022.

Please find copies of our IRS 990 and most recent audit at [UnitedWayIRC.org/finances](http://UnitedWayIRC.org/finances).

## Income –

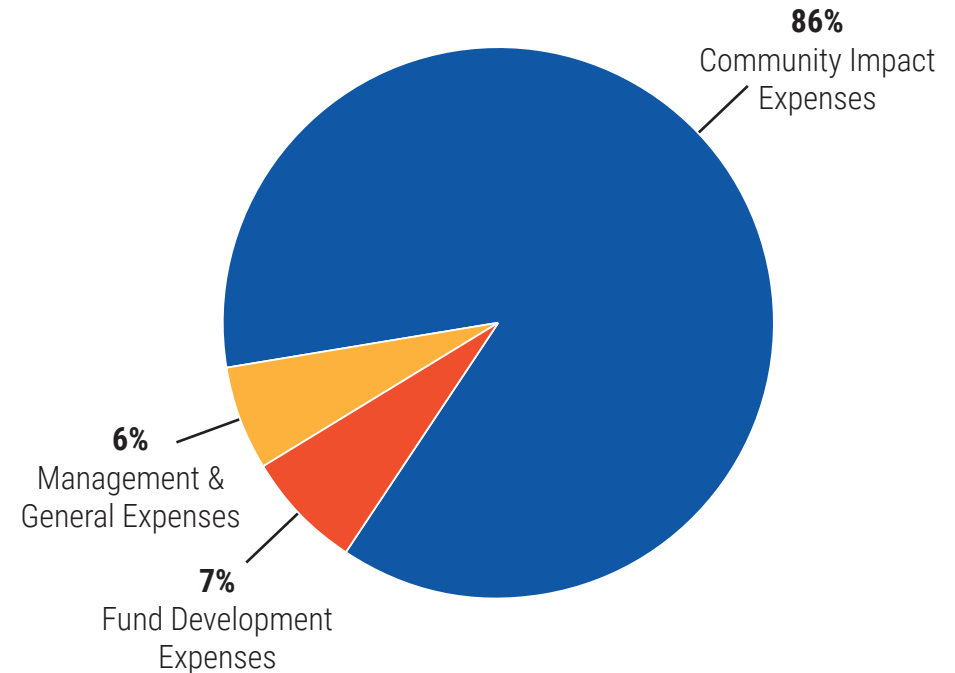
Public Support & Revenue	\$2,881,515
Net Campaign Revenue	\$2,385,422
Federal Grant Revenue - CARES Act	\$350,000
Community Response Fund	\$26,196
In-kind Contributions	\$90,858
Investments, Net	(\$136,569)
Other	\$165,608

## Expenses –

Community Support Services	\$2,738,050
Campaign Fund Development	\$262,650
Management & General	\$203,050
<b>Total Expenses</b>	<b>\$3,203,750</b>
Changes in Net Assets	(\$322,235)
Net Assets, Beginning of Year	\$2,581,921
New Assets, End of Year	\$2,259,686

# TOTAL EXPENSES

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## Volunteer Income Tax Assistance (VITA) Program –

<b>\$1,733,145</b> total refunds for clients	<b>\$1,867</b> average refund amount per client
	<b>\$238,000</b> saved in filing fees

**\$516,897**  
in Earned Income Credits

**1,360**  
filed tax returns

# 60 YEARS OF HISTORY

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## A woman, a priest, and a rabbi...

In 1887, a Denver woman, a priest, two ministers and a rabbi got together... It sounds like the beginning of a joke, but they didn't walk into a bar; what they did do was recognize the need to work together in new ways to make Denver a better place - an idea that became the nation's first united campaign and created a movement that would become United Way.

### 1961

In Indian River County, the United Fund was formed, raising \$44,367 for social service agencies. The first campaign lasted 28 days and was organized out of a four-draw file cabinet housed in the Chamber offices. Piper Aircraft marks the first Workplace Campaign raising \$25,000.

### 1971

Under the leadership of Jim Thompson, \$97,901 was raised, and 21 agencies received funding.

### 1973

United Way joins forces with the NFL to create public service announcements and programs featuring NFL players, coaches and owners to boost awareness of social service issues. The "one gift works many wonders," campaign, featuring Woody the Woodpecker helps thousands of residents.

"efforts were endless and determination unlimited."  
-Press Journal on Campaign Chair, Dick Bird



# 60 YEARS OF HISTORY

PAGE 10

### 1976

The United Fund Board of Directors unanimously voted to change the organization's name to the United Way of Indian River County, Inc.

### 1977

The expansion phase welcomed the beginning of the Volunteer Bureau and a county-wide Information and Referral Service.

### 1985

The 1st Annual Citrus Golf Tournament tees off.

### 1987

The national United Way Movement turns 100.

### 1992

The first Annual Community Leader's Breakfast was held. After Hurricane Andrew, a Special Response Fund was established to set 10% aside of money raised enabling non-partner agencies to apply for special project funds.





# 60 YEARS OF HISTORY

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## 1993

Volunteers rolled up their sleeves for the first Annual Day of Caring.

## 1997

Citrus Holiday Fundraiser begins.

## 2001

Celebrating our 40th Anniversary, funding increased to \$1.6 million.

## 2004

In wake of Hurricane Charley, Frances, and Jeanne, \$200,000 was authorized for emergency disaster response and recovery relief efforts.

## 2006

United Way Center calls 1836 14th Avenue home.

## 2010

United Way charts success: 50 years, \$39 million raised and VITA takes on its first clients.

## 2011

The United Way Foundation of Indian River County was established with \$2.3 million in assets.

**40**  
*Wonderful Years*  
Serving Indian River County



## The DODGER GREATS meet the DODGER GREATS

**Benefit Exhibition Baseball Game**  
The Los Angeles Dodgers Adult Baseball Camp comes to an exciting climax with a game between the all-time "Greats" instructors and the "Near Greats" camp participants!

**Here's the Dodger 'Greats' Line-up:**  
Ralph Branca, Roy Campanella, Tommy Davis, Don Drysdale, Carl Erskine, Carl Furillo, Lou Johnson, Clem Labine, Tom Lasorda, Ken McMullen, Wes Parker, Ron Perrano, Johnny Podres, Prescher Roe, Ted Sizemore, Duke Snider, and Camp Director Guy Wellman.



**You Can Be Part of the Fun!**  
Help the "veteran" baseball trainees have a day to remember. See some All-Time Dodger Greats and experience the special satisfaction of knowing that all the proceeds will be benefiting the United Way.

**HOLMAN STADIUM**  
**FRIDAY, NOVEMBER 14**  
**2:00 P.M.**

**All Seats - \$2.50**

For Ticket Information Call 569-4900

All Ticket Proceeds Benefit the Indian River County United Way.



# 60 YEARS OF HISTORY

PAGE 12

## 2014

Success By 6 was created to address problems facing children six years old or younger. 2014 marks the first pitch at the Jackie Robinson Celebration Game.

## 2015

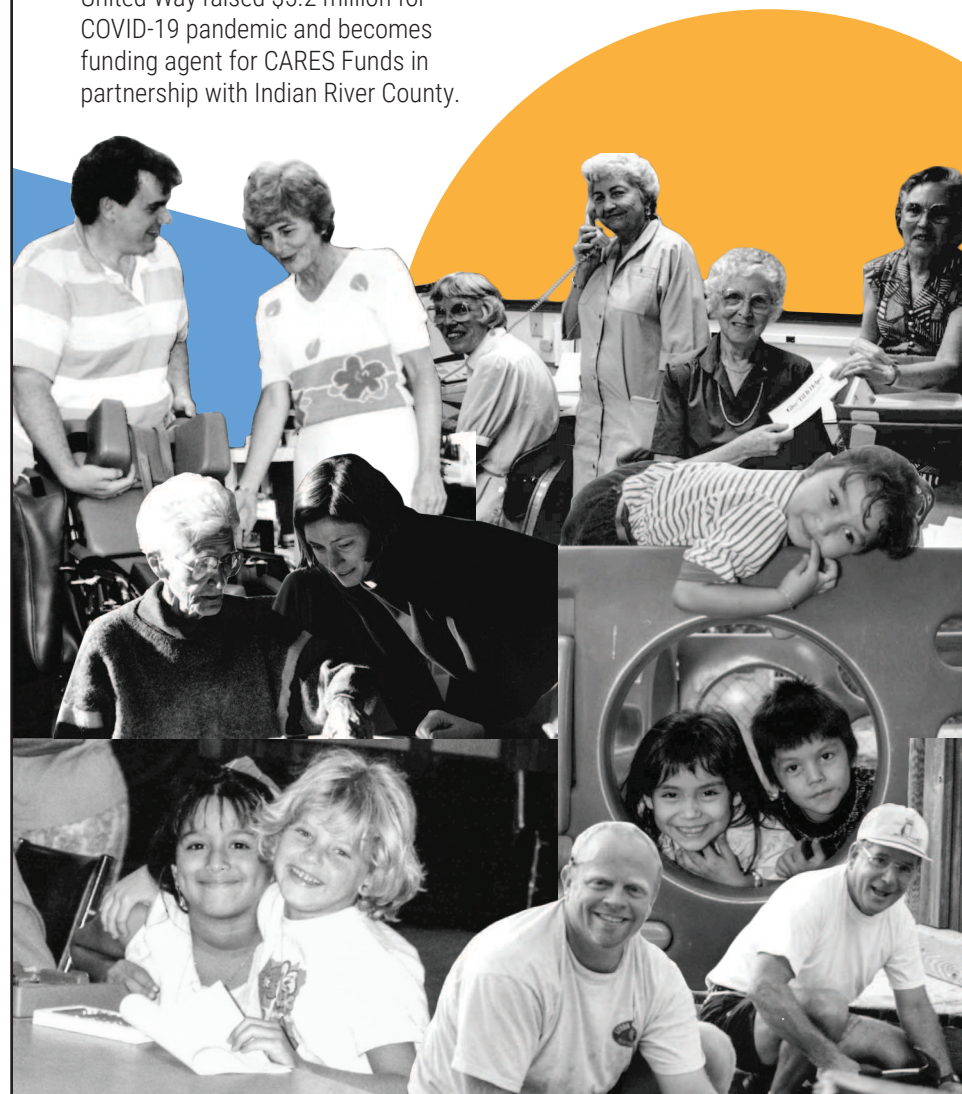
Move toward Community Impact Model.

## 2020

United Way raised \$5.2 million for COVID-19 pandemic and becomes funding agent for CARES Funds in partnership with Indian River County.

## 2021

In the last 60 years, a total of \$72,139,051 has been raised to help everyone in Indian River County thrive.





# COMMUNITY LEADER'S BREAKFAST

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***"Since the pandemic hit 18 months ago, your United Way has been working overtime to help our community. With your support, we have raised, leveraged, and distributed more than \$5.2 million for this crisis response work." –Jeff Schlitt, Board Chair***

After a brief hiatus due to the pandemic, friendly faces of regular campaign supporters gathered virtually, thanks to our Presenting Sponsor, Florida Power & Light Company. Keynote speaker Jeff Johnson, State Director of AARP Florida, discussed the importance of making communities more livable for all ages.

The Prize Patrol, hosted by Board Chair-Elect, Jeff Petersen, had the esteemed privilege of recognizing the Richardson Spirit of Indian River County Award winners by surprising them at their places of business.



# COMMUNITY LEADER'S BREAKFAST

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These prestigious awards were presented to the following honorees for making a notable difference in our community:

- The Richardson Spirit of Indian River County Award for Workplace Campaign: *School District of Indian River County*
- The Richardson Spirit of Indian River County Award for Partner Agency Workplace Campaign: *Substance Awareness Center of Indian River County*
- The Richardson Spirit of Indian River County Award Community Champion: *Jeremy Odom*
- Ralph T. King Award: *Jeff Smith*





## DAY OF CARING

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Typically, the largest one-day volunteer event in Indian River County, pivoted again to small, socially distanced groups to adhere to safety protocols.

While the teams may have been small, the task was monumental – 1,000 hygiene kits were packed and delivered to unhoused children living in our community. Thanks to our sponsors, Publix, Inc. and McDonald's, each backpack included shampoo, soap, a toothbrush, toothpaste, floss, sponges, deodorant, hair gel, and hand sanitizer.

## DID YOU KNOW?

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### Did you know?

423 students are homeless in Indian River County. Plus 250 more students are considered to be "couch surfing."\*

*\*This data is often significantly under represented, due to family concerns of repercussions.*

# WORKPLACE CAMPAIGNS

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Workplace giving is an easy and effective way for employees to make a difference and show them their workplace is actively supporting their local community's most important issues.

Employees of a company are given an opportunity to support United Way of Indian River County (UWIRC) by donating via payroll deduction, cash, or check.

These employees' investments benefit the entire community, not just one program, issue, or population, and this leads to a stronger, more sustainable place to live and work.

UWIRC provides expert management of donor investments and brings the right people, ideas, and resources together to solve the most pressing needs of the community and finds innovative solutions for lasting change.

## Sawbones VS. Jawbones Softball Tournament –

Local professionals give back to their community at the annual Sawbones VS. Jawbones softball tournament presented by Cleveland Clinic Indian River. The doctors vs. lawyers rivalry continued for the 11th year at the newly renovated Holman Stadium at the Jackie Robinson Training Complex, raising nearly \$8,000 for United Way and the community.



# WORKPLACE CAMPAIGNS

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All-Rite Water Purification  
AT&T  
AYS Employee Leasing  
Bank of America  
Best Buy Store #816  
Boys & Girls Clubs of IRC  
Camp Haven  
Childcare Resources of Indian River  
Children's Home Society  
City of Fellsmere  
City of Sebastian  
City of Vero Beach  
Cleveland Clinic Indian River  
Croom Construction  
Crossover Mission  
Cumberland Farms  
Dillard's Department Stores, Inc.  
Disney's Vero Beach Resort  
Drug Abuse Treatment Association, Inc.  
Economic Opportunities Council  
Elliot Merrill Community Management  
Federal Express Corporation  
Fellsmere Farms  
Florida Floor Fashions  
Florida Power and Light Company  
George E. Warren Corporation  
Gifford Youth Achievement Center  
Gould Cooksey Fennell  
HealthSouth  
Hibiscus Children's Center  
Indian River County  
IRC Clerk of the Circuit Court  
IRC Healthy Start Coalition  
IRC Property Appraiser's Office  
IRC School District  
IRC Sheriff's Office  
IRC Supervisor of Elections  
Jacoby and Handley, PLLC  
John's Island Real Estate  
Kmetz, Elwell, Graham & Assoc., CPA's  
Law Offices of Jennifer Peshke  
Literacy Services of IRC  
Marine Bank  
Mental Health Association in IRC  
Mental Health Collaborative  
Northern Trust  
Nylacarb Corporation  
Piper Aircraft, Inc.  
PNC Advisors  
Proctor Construction  
Publix Super Markets, Inc.  
Raymond James & Associates  
Redlands Christian Migrant Association  
Regency Windsor Management, Inc.  
Rehmann  
Riverside Theatre  
Rossway Swan Tierney Barry Lacey & Oliver, P.L.  
SafeSpace  
Samaritan Center  
Schlitt Services  
Seacoast Bank  
SouthState Bank  
Space Coast Credit Union  
Spiezle Architectural Group, Inc.  
Substance Awareness Center  
SunTrust Bank  
Target  
TD Bank  
The Arc of Indian River County, Inc.  
The Hill Group  
Town of Indian River Shores  
Treasure Coast Community Health  
Tykes & Teens  
United Parcel Service  
Vero Insurance  
Veterans Council of Indian River County  
Visiting Nurse Association  
Walmart  
Wells Fargo  
Wilmington Trust, N.A.  
Windsor (Torwest)  
Youth Guidance



## SPECIAL EVENTS

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### Publix Appreciation Week –

Whether it's lending a hand to carry a heavy bag for an elderly neighbor, packing groceries for delivery to those who feel safer at home, or continuing to show up on the front lines throughout the pandemic – grocery workers are there to support us.

Every year, we celebrate United Way Worldwide's No. 1 Global Corporate Leader, Publix Super Markets, Inc. Publix associates collectively create a major impact for local United Ways within their 7-state footprint. They truly LIVE UNITED by giving their time, talents, and treasures to our local communities.

## SPECIAL EVENTS

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### Pinwheels for Prevention –

In April, we participated in the Child Abuse Prevention Campaign, Pinwheels for Prevention. Across the Treasure Coast, struggling families have access to people and organizations who will work with them to build these capabilities and lift their families.

United Way invests in local solutions to prevent child abuse through non-profit agencies with established best practices, such as Healthy Families Florida, IRC Healthy Start Coalition, Safe Families for Children, and Childcare Resources. As a community, we are helping to improve parenting skills, counseling, support, and connections to a host of resources.



# CITRUS GOLF TOURNAMENT

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## Golf Sponsors –

JBT Food Tech  
Bernard Egan Foundation  
Perfect Stix, LLC  
Complete Electric, Inc.  
CED Vero  
SouthState Bank  
Rehmann  
Schlitt Services  
The Hill Group  
Nelson Morgan Fessler Petersen  
Wealth Management  
IRSC Foundation, Inc.  
Jeremiah's Italian Ice of Vero Beach  
Northern Trust

TC Enterprises of the Treasure Coast  
George E. Warren Corporation  
Barker Air Conditioning & Heating  
Plant Food Systems, Inc.  
Comcast Business  
JR Land Management LLC  
Lulich & Attorneys, P.A.  
STAR Technology  
The Wawa Foundation  
Florida Floor Fashions  
Law Offices of Robert C. Nall  
Smoke Inn Cigars Vero Beach  
Jones and Jones Advertising  
Gould Cooksey Fennell, PLLC

# CITRUS GOLF TOURNAMENT

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Over the past thirty-five years, the Citrus Golf Tournament has largely contributed to our campaign goals raising a combined total of over \$600k. In spite of this years stormy weather, it was a great day out on the greens. Every dollar raised by the tournament is invested in programs that have a direct and measurable impact on the community.





# CAMPAIGN SPONSORS

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## Torchbearers –

Bank of America  
Bernard A. Egan Foundation  
Cleveland Clinic Indian River  
Florida Power & Light Company  
Indian River County  
IRC School District  
Piper Aircraft, Inc.  
Publix Super Markets, Inc.  
Wells Fargo

## Elite Campaign Sponsors –

Alex MacWilliam Real Estate  
Armfield Wagner, Inc. Appraisers  
AYS Employee Leasing  
Dale Sorensen Real Estate  
Disney's Vero Beach Resort  
Florida Power & Light Company  
Graves Brothers Company  
Jacoby and Handley, PLLC  
Kmetz, Elwell, Graham &  
Associates, CPA's  
Marine Bank  
Northern Trust  
Rossway Swan Tierney Barry & Oliver, P.L.  
Schlitt Services  
SouthState Bank  
USI Insurance Services

# EVENT SPONSORS

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## Volunteer Income Tax Assistance (VITA) Program Sponsors –

Jacoby & Handley, PLLC, CPA's  
Kmetz, Elwell, Graham & Associates, CPA's

## In-kind Sponsors –

Costa d'Este Beach Resort & Spa  
Countryside Citrus  
Environmental Learning Center  
EverGreen Media  
Hometown News  
Jones & Jones Advertising, Inc.  
LoPresti Productions  
McDonald's  
Mulligan's Beach House  
Paddles by the Sea  
Perfect Stix

Riverside Theatre  
Sailfish Brewing Company  
Smoke Inn Cigars Vero Beach  
Southern Eagle Distributing  
TCPalm  
The Ad Agency  
The Beach Shop  
Treasure & Space Coast Radio  
WFLM Radio  
White Glove Moving & Storage  
Vero Beach 32963



# ALEXIS DE TOCQUEVILLE SOCIETY

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With an annual gift of \$10,000 or more, Alexis de Tocqueville Society members are creating a profound and lasting impact throughout Indian River County.

*Donations received from July 1, 2021 - June 30, 2022.*

*We greatly appreciate each gift given in support of United Way and have made every effort to ensure the accuracy of this listing. Please notify us of any inaccuracies or omissions. We regret any errors.*

## Ordre D'Égalité (\$50,000-\$74,999) –

Edward and Sherry Ann Dayton

Jim and Jean Kelly

## Ordre De Liberté (\$25,000-\$49,999) –

Duane and Dorothy Bluemke  
Chris and Keena Clifford  
Barbara D. Hauptfuhrer,  
in memory of Bob  
Betty MacMillan  
Raymond J. and Sonia McGowan

Edward and Dawn Michael  
Jack and Mollie Rogers  
Mr. and Mrs. O. Griffith Sexton  
King and Dace Stubbs  
Mrs. David K. Welles, Sr.  
Bernard A. Egan Foundation, Inc.

# ALEXIS DE TOCQUEVILLE SOCIETY

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## Membres de la Société (\$10,000-\$24,999) –

1 Anonymous Donor  
Norman and Ann Baker  
Mr. and Mrs. Andrew P. Barton, Jr.  
Mrs. Herman F. Becker  
Bill and Mary Ann Becker  
John and Jean Beckert  
William and Marcia Blackburn  
Fritz and Gay Blaicher  
Don and Mary Blair  
Barbe Bonjour Pike  
Mr. and Mrs. Theodore W. Brickman, Jr.  
Mr. Richard J. Canty and  
Ms. Hope B. Woodhouse  
Wendy and Chase Carey  
Amy and Cecil Conlee  
D. Lorne and Jane R. Coyle  
Marybeth and Chuck Cunningham  
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Veronica and Vincent (V.J.) Dowling  
David and Harriet Dyer  
Janet I. & H. James Field, Jr. Fund  
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Susan and Paul Hanson  
Hauser Family Foundation  
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Hoffman Foundation  
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Ted and Debbie Kelly  
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Charles and Susan Moritz  
Susan and Bob Morrison  
Chad and Lisa Morrison  
Sharon and David Northrup  
Patricia Perkins  
Jeffrey Petersen and Maria Segura  
Ed and Jan Pillard  
Michael and Anne Rhoads  
Marjorie Hopwood Richardson and  
Danforth Kidd Richardson  
Don and Patsy Riefler  
Sandy and Randy Rolf  
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Camp Younts Foundation  
Michael and Susan White  
Judy and Kent Whittaker  
Marcy and Robert Wolpe  
Joan Woodhouse  
J.M. Hopwood Charitable Trust  
A. James & Alice B. Clark Foundation

# LEADERSHIP DONORS

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## Diamond Circle (\$7,500-\$9,999) –

Mr. James G. Berges  
Four-Four Foundation, Inc.  
John W. Childs  
Indian River County Bar Assoc.

Ms. MaryMargaret Lucas  
Robert & Sheila Washburn  
Mr. and Mrs. James B. Wigdale\*

## Platinum Circle (\$5,000-\$7,499) –

1 Anonymous Donor  
Steve and Lucia Bailey  
Mr. and Mrs. Timothy Beaulac  
Susan and Dick Bergeman  
Mary L. Casey  
Dr. and Mrs. Robert P. Christopher  
Mr. and Mrs. Jonathan M. Clark  
Mr. and Mrs. John F. Curley  
Mrs. James L. Currie  
Dick and Maryanne Davis  
Andrew and Betsy Forrester  
Mr. and Mrs. Bernard M. Freeman  
Mr. and Mrs. William Grealis  
Mary and Gordon Harnett  
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Mr. and Mrs. Thomas G. Hopkins  
Kip and Mary Jacoby  
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Barclay and Dennis Kass  
Mrs. Peter Kennedy  
Mrs. Reginald B. Newman II  
Mr. and Mrs. James J. O'Connor, III  
Mr. Michael Perez and  
Ms. Barbara Edelstein  
Mr. Paul Pronsky, Jr.  
Mr. and Mrs. John L. Salmon  
Dick and Nancy Shoemate  
Mr. and Mrs. David Smick  
John and Terry Souza  
Mr. and Mrs. John W. Taylor  
Mr. and Mrs. Peter M. Thompson  
Mr. and Mrs. Sten Tonnessen  
Judith and Andrew Tucker  
Jeff and Carol Twyman  
Andy and Robin Williams

## Gold Circle (\$2,500-\$4,999) –

Linda Aiken, V.M.D.  
Mr. and Mrs. Richard Axilrod  
Mrs. Barbara Baldwin  
David and Tina Banta  
Jayne and Paul Becker  
Ms. Carole Beecher Brown  
Mr. and Mrs. William C. Buck

Julie and Peter Burchfield  
Mr. and Mrs. Robert E. Byrket  
Mr. and Mrs. James Byrnes  
Dan Chappell  
Ms. Helan Cox  
Mr. and Mrs. Richard Detwiler, Jr.  
Mr. and Mrs. Keith Drewett

# LEADERSHIP DONORS

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## Gold Circle (Continued) –

Steve and Edie Dubord  
Chris and Becky Ellis  
Mr. and Mrs. Frederick Floyd  
Mr. Kyle Gabbard  
David and Lynn Geiser  
Miriam Grabow  
Mrs. Mary P. Graves  
Graves Brothers Company  
Greene Groves & Ranch  
Mr. and Mrs. Charles J. Gulino  
Mr. and Mrs. Samuel B. Hayes III  
John and Tracey Hrusovsky  
Jacqueline and John Hullar  
Dr. and Mrs. Leander Jennings  
Mr. and Mrs. James Johnson  
Mr. and Mrs. John L. Kelsey  
Jay and Linda Knoll  
Mr. William W. Lane  
Mr. and Mrs. Richard Lowry  
The Luther Family Foundation,  
John and Nancy Luther  
Mr. and Mrs. Gordon S. Mann  
Ms. Edna Marino

Mrs. Phoebe Meehan  
Liz and Nick Melnick  
Karen K. Meyer  
Nancy and Dick Milsten  
Mr. John Moran  
Dick Oehme  
Mr. and Mrs. Raymond J. Oglethorpe Jr.  
Ed and Tibra Parker  
Gary Phillips  
Mr. and Mrs. Dean P. Phypers  
Mr. Benjamin Pridemore  
Mr. and Mrs. Robert D. Reisman  
Mr. and Mrs. Talmage G. Rogers, Jr.  
Jack and Penny Rohrbach  
Mr. and Mrs. Frank C. Schroeder  
Mr. & Mrs. John B. Scott  
Mrs. Charlotte S. Stifel  
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Jane and John Todd  
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 \* Deceased

# UNITED WAY FOUNDATION

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United Way Foundation of Indian River County, Inc. is a separate nonprofit organization classified as a Type I supporting organization. It is governed by a local volunteer Board of Directors comprised of financial professionals and community leaders.

The Foundation is committed to building a permanent endowment to generate funds in support of the community-wide work of United Way of Indian River County.

**Please find copies of our IRS 990 and our most recent audit at [UnitedWayIRC.org/finances](http://UnitedWayIRC.org/finances).**

At the beginning of 2021, the United Way Foundation had \$5.56 million in assets under management with another \$6.1 million in documented legacy gifts that will be realized in the future. Gifts to the Foundation are invested for growth with a percentage available for distribution each year to support and sustain the critically important work being done by UWIRC.

If United Way of Indian River County has been an important part of your charitable giving, we would welcome an opportunity to meet with you and discuss legacy options that best suit you and your family's goals.

**To learn more about endowing your annual support call the United Way Foundation, at (772) 569-6777.**

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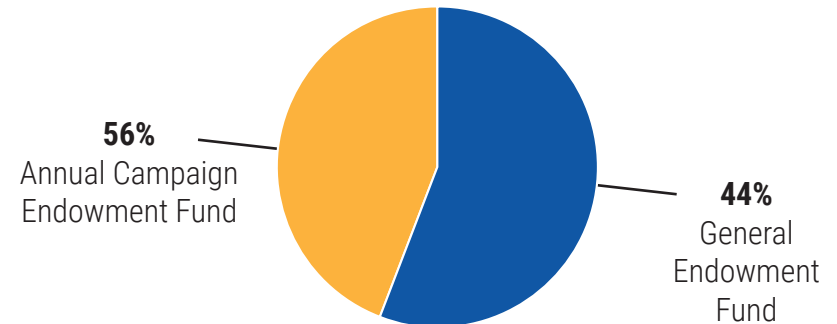
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Elizabeth Ullian  
*Executive Director*

# ENDOWMENT FUNDS

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## ASSETS

### *Annual Campaign Endowment*

Endowed funds restricted in purpose to solely support United Way partner agency programs as part of United Way's annual Community Investment process.

### *General Endowment*

Endowed funds not restricted by donor in purpose to be used at the Board's discretion.

## INCOME

Contribution	\$177,394
Investment Return, Net	(\$657,863)

## TOTAL

Public Support & Revenue	(\$480,469)
--------------------------	-------------

## EXPENSES

Community Support Services	\$109,554
Endowment Operations	\$113,737

Total Expenses	\$223,291
Changes in Net Assets	(\$703,760)
Net Assets, Beginning of Year	\$5,537,175
Net Assets, End of Year	\$4,833,415

# FOUNDATION DONORS

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## Tocqueville Legacy Circle –

*The following individuals have either made or made provisions for a thoughtful legacy gift to endow their annual gift to the United Way of Indian River County as members of the esteemed Alexis de Tocqueville Society. Each year, the Foundation will make a gift of \$10,000 or more to the annual campaign in their names in perpetuity.*

Fred M. and Gay C. Blaicher	Edward and Dawn Michael
Dick and Sally Brickman	Lee and John Moore
Chris and Keena Clifford	Marjorie Hopwood Richardson and
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## Leadership Legacy Circle –

*The following individuals have either made or made provisions for a thoughtful legacy gift to endow their annual gift to the United Way of Indian River County as members of the distinguished Leadership Investment Society. Each year, the Foundation will make a gift of \$1,000-9,999 to the annual campaign in their names in perpetuity.*

Norman and Ann Baker	Joseph Mullaney
Bill and Nancy Curtis	Dr. Julie Vargo and Dr. David O'Brien
Chris and Don Loftus	Daniel and Karen Somes
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## Legacy Society

*The following companies, private foundations, and individuals have made or made provisions for gifts to the Foundation to support the many facets of the critically important work of our local United Way here in Indian River County for generations to come.*

43 donors who wish to remain anonymous	Fran Adams
	Valerie and Douglas Anderson

# FOUNDATION DONORS

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## Legacy Society Continued –

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# FOUNDATION DONORS

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# FOUNDATION DONORS

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## Legacy Society Continued –

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Archie S. Wingfield, Jr. Charitable Trust  
Henry and Joan Woodhouse

## Memorial Gifts –

*Memorial gifts celebrating the life of the following individuals have been made by their family, friends, and colleagues to honor their philanthropic spirit and forever support United Way's working in advancing the common good here in Indian River County.*

Louis Allocca  
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[ To improve lives by mobilizing the caring power of our community. ]

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