



UNITED WAY
Indian River County

COMMUNITY IMPACT REPORT

24
25



A WORD FROM OUR LEADERSHIP

What does it mean to build a thriving community? It's not about responding to crises; it's about preventing them. It's not about isolated programs; it's about coordinated systems. It's not about charity; it's about strategic infrastructure that catches families before they fall.

That infrastructure is United Way, ensuring that when challenges arise, the response is swift, coordinated, and effective.

Our 2024-2025 year began with unprecedented tornadoes tearing through our community, and once again, our team stepped in to lead relief and recovery efforts. In the aftermath of Hurricane Milton, we saw an extraordinary outpouring of compassion. You showed up with your time, your resources, and your generosity—quickly, wholeheartedly, and with genuine kindness.

This year proved our model works. But what you witnessed wasn't exceptional; it was our everyday work made visible. The coordination. The partnerships. The rapid response. That's United Way—standing with individuals and families through life's challenges.

Two years ago, we launched Access to Justice, a groundbreaking public-private partnership with the Clerk of the Court and the first of its kind in Florida. In just two years, we've supported over 2,200 individuals facing civil and family law crises.

Why does this matter? Because an eviction isn't just a loss of a home—it disrupts education, employment, health, and long-term stability. When we prevent one eviction, we keep children in school, parents in their jobs, and families on pathways to financial security. This is prevention as infrastructure.

Our Volunteer Tax Assistance program isn't just about filing forms; it's about economic justice. This year, we secured over \$1.3 million in tax credits and returned \$1.94 million to nearly 2,500 local households. For families living paycheck to paycheck, those refunds aren't extra—they're essential. Rent gets paid. Groceries get bought. Cars get repaired. Crises are prevented.

We invested over \$1.5 million in 48 programs across 34 partner agencies, from early childhood education and mental health to food security and healthcare access. But we don't just write checks. We convene partners, eliminate duplication, fill service gaps, and ensure families experience coordinated support rather than fragmented services.

When you support United Way, you are not funding just another nonprofit. You are investing in the backbone infrastructure that enables dozens of programs to operate as one coordinated system of care.

This year also brought moments of celebration. We brought back the cherished Jackie Robinson baseball game and expanded community engagement events like our St. Paddle's Day Pickleball Tournament and our Block Party Featuring Trike Wars.

We cannot let visibility fade when headlines shift. Prevention, treatment, and social services must remain adequately funded or the next crisis will hit harder, more families will fall further, and recovery will take longer.

United Way is the force that brings the whole community together to solve problems too big for any one organization. We align partners, invest where data shows the greatest need, and build the systems that help families thrive.

This is the work United Way is built for. This is why your continued support is essential.

Together, we're building the resilience that helps our community thrive.

With gratitude and determination,



Meredith Egan
Meredith Egan
Chief Executive Officer



K C Nall
Dr. Katie Nall
Board Chair

BOARD OF DIRECTORS

Dr. Katie Nall, Chair
Jamie Bell, Chair-Elect
Curtis Carpenter, Secretary
Jessica Churchill, Treasurer
Brian McMahon, Ph.D.,
CIC Chair
Christopher Bieber, At Large
Dana M. Apfelbaum
Bethany Burt
Ryan Butler
Amber Cerda
Chris Ellis
Kathy Hendrix
Chris Hill
Fred Jones
Carole Jean Jordan
Mike Mosel
Capt. Ross Partee
Anne W. Posey, LMHC, NCC
Suzanne Seldes
Denise D. Smith, Ed.D.
Caryn Toole

OUR STAFF

Nate Bruckner
Cindy Carr
Tricia Crocco
Meredith Egan
Sydney Mihailoff
Amanda Morgan
Miguel Saldana
Jessica Schmitt, CFRE
Deana Shatley
Sarah Tucci
Annette Yost



With your support,
we invested \$3.68
million in community
impact including \$1.59
million towards 48
programs at 34 agencies
and \$2.09 million driving
additional initiatives—
helping 1 in 4 people in
Indian River County.

IMPACT AT A GLANCE



Health | \$615,960 Invested

45,715 People served through access to nutritious food, mental health services, dental care and senior services.



Education | \$559,945 Invested

3,183 Children supported with high-quality early education, enriched after school programming and leadership development.



Financial Stability | \$717,852 Invested

22,098 Neighbors served with emergency case management, affordable housing, job training, budgeting skills and free income tax preparation.



Community Resilience | \$1,783,918 Invested

2,727 People supported post-disaster

FUNDED PROGRAMS

Alzheimer & Parkinson Association of Indian River County

Respite: Caring for the Caregiver

American Red Cross, South Florida Region

Home Fire Prevention & Emergency Assistance

Big Brothers, Big Sisters of St. Lucie, Indian River & Okeechobee Counties, Inc.

Community Based Mentoring · Passport to Early Literacy

Boys & Girls Clubs of Indian River County

Project Learn

Camp Haven, Inc.

Pathways to Financial Stability

Catholic Charities of the Diocese of Palm Beach

Samaritan Center for Homeless Families

Childcare Resources of Indian River

Subsidized High Quality Childcare · Wellness & Early Intervention Program

Children's Home Society of Florida, Treasure Coast Region

Dodgertown Elementary Community Partnership School

Crossover Mission

Accelerate My Potential (AMP) Program · Healthy Kids Program
Transcendence Academy

Drug Abuse Treatment Association, Inc.

Norman C. Hayslip Treatment Center, Fort Pierce · Outpatient Treatment Center

Early Learning Coalition of Indian River, Martin & Okeechobee Counties, Inc.

VPK Completers

Gifford Youth Achievement Center, Inc.

After School Education Program (ASEP)

Hibiscus Children's Center, Inc.

Career Pathways to Independence Program

Indian River County Healthy Start Coalition, Inc.

Babies & Beyond · Healthy Families · Nurse Family Partnership · Parents as Teachers

Indian River Habitat for Humanity

Critical Home Repair Program

Literacy Services of Indian River County, Inc.

Adult & Family Literacy

Mental Health Association in Indian River County

Walk-In & Counseling Center

FUNDED PROGRAMS

Mental Health Collaborative of Indian River County, Inc.

McCabe Connections Center

Pelican Island Audubon Society

Audubon Advocates After-School Lagoon Science Program

Redlands Christian Migrant Association, Inc.

Enhancing Early Learning & Family Support Services

SafeSpace, Inc.

SafeSpace Domestic Violence Services

Senior Resource Association, Inc.

DayAway Program · Senior Navigation Program
Meals on Wheels/Emergency Meals on Wheels

The Arc of Indian River County

Behavioral Analysis Program · Supported Employment Program

The Hope for Families Center, Inc.

Helping Homeless Families Achieve Success

The Learning Alliance, Inc.

Moonshot Families · The Learning Alliance Summer Programs

The Salvation Army

Homelessness Prevention & Social Services Program

Thrive

Prevention Works! · Recovery Works!

Treasure Coast Community Health, Inc.

Dental Services

Treasure Coast Food Bank, Inc.

Mobile Pantry

Treasure Coast Homeless Services Council, Inc.

Homeless Resource Center

United Against Poverty, Inc.

Success Training for Employment Program (STEP)

Veterans Council of Indian River County, Inc.

Veterans Case Management & Direct Aid

Visiting Nurse Association of the Treasure Coast

Telehealth: Chronic Disease Management Program

Youth Guidance Mentoring Academy

Pre-Apprenticeship Program · The Mentoring Academy

COMMUNITY IN ACTION

Neighbors Guiding Change

At the heart of our mission is trust, trust that every dollar given by our donors is making a real difference. The Citizens' Review Process (CRP) ensures just that. Each year, nearly 100 local volunteers come together to carefully review funding requests, visit agencies, and evaluate the programs shaping lives across Indian River County.

The volunteer-driven process is how we uphold transparency and accountability. Every funding decision is made by people who live and work right here in our community, people who want to see local families thrive. Through their time and commitment, CRP volunteers help direct resources to where they're needed most, ensuring that support reaches programs that strengthen health, education, and financial stability.



93

total volunteer
Citizens' Review Panelist

938

total volunteer
panelist hours



"This is more than just funding programs—it's about building a connected, reliable safety net. When someone faces a crisis, it's rarely one-dimensional. We work to ensure families have the support they need not just to survive, but to move forward."

Brian McMahon, Ph.D.
Director of Accountability & Research
School District of Indian River County
Community Impact Committee Chair
United Way Board Member



2,484

clients served

\$1.94M+

in total refunds



\$1,225

average refund

Free Tax Prep: Putting Money Back in Local Pockets

The Volunteer Income Tax Assistance (VITA) program once again made a powerful impact this year, returning nearly \$2 million to Indian River County residents through free, reliable tax preparation.

Supported by 37 trained volunteers, the program helped more than 2,400 individuals and families file their taxes accurately and claim valuable credits—like the Earned Income and Child Tax Credits—while saving hundreds in filing fees.

For working families, these refunds provided more than financial relief, they offered stability, opportunity, and peace of mind.



Conversations that Inspire Action

Powered by Purpose continued to spark meaningful dialogue and collaboration this year. The speaker series brought together local leaders, experts, and residents to address issues shaping life in Indian River County, from the housing crisis and rising costs for working families to gaps in women's and children's healthcare and the need for second chances for justice-involved individuals.

Hosted by Northern Trust, each session encouraged open discussion, fresh perspectives, and shared solutions. The kickoff "Meet the Funders" event strengthened connections between nonprofits and funders, reinforcing United Way's role as convener, bringing people and resources together to drive lasting change across our community.

LEADING TOGETHER

Honoring Local Changemakers

This year's Community Leaders' Breakfast gathered nearly 200 community members at Celebration Grove for a morning of inspiration and connection. Sponsored by Seacoast Bank, the event featured keynote speaker and author Rena Romano, whose message of resilience and hope resonated deeply with attendees. United Way CEO Meredith Egan and Board Chair Dr. Katie Nall highlighted the power of unity and collaboration in addressing Indian River County's most pressing needs.

The morning also celebrated community service through the Richardson Spirit of Indian River County Awards. Honorees included Schlitt Services, Indian River County Healthy Start Coalition, United Against Poverty, and Jeff Pickering of the Indian River Community Foundation. The Ralph T. King Award was presented to Michael Kint, recognizing his decades of leadership and lasting contributions to mental health and early childhood development. These stories shared at the breakfast remind us when we united as a community, we create lasting change for Indian River County.



In Indian River County



1 in 2
renters are
cost-burdened

20.7%
maternal morbidity

Recidivism drops by
66%
with education
& work programs



Team Publix Troy Clemenzi, Ryan Paulsen and Doug Theall secured their second Trike Wars victory, having also won the event's inaugural year.



UNITED WAY GAMES

Community Events with Purpose

Throughout 2024-2025, we brought people together through events that celebrated service, strengthened community spirit, and fueled local impact.

Our 29th Annual Day of Caring mobilized more than 500 volunteers to complete 49 service projects across the county, assembling 287 early learning kits and creating a new Born Learning Trail in Sebastian.

Sporting events like the Second Annual Wiffle Palooza Tournament and Saint Paddle's Day Pickleball Tournament combined fun and philanthropy, raising funds to support programs that improve health, education, and financial stability.

In April, over 4,300 fans once again filled Holman Stadium for the Jackie Robinson Celebration Game, raising more than \$30,000 while honoring Robinson's enduring legacy of unity and progress.

The 39th Annual Citrus Golf Tournament carried on a decades-long tradition of generosity, and the Third Annual Trike Wars & Thank You Block Party capped off the campaign season with gratitude and good-spirited competition.

Each event reminded us that when our community comes together—on the field, in the park, or in service—lasting impact follows. We hope you join us this year!



IMPACT IN ACTION

Opening Doors to Justice

Our Access to Justice initiative ensures that community members who cannot afford an attorney still have a clear and supportive path through the legal system. In partnership with the Indian River County Clerk of the Circuit Courts, our Self-Help Center provides free, accessible guidance for individuals navigating family law matters, residential evictions, small claims, and other civil issues.

Now in its second year, the initiative has become a trusted resource for residents who might otherwise face the courts alone. With bilingual legal kiosks across the county, professional staff offering step-by-step assistance, and virtual pro bono attorney consultations for more complex matters, we help individuals understand their options, complete required forms, and move forward with confidence—strengthening housing stability, family well-being, and economic opportunity throughout our community.



“Grateful you are available to the community to people who have no legal experience, but do not know if they need to get a lawyer for the situation they are in. It helps to start with a consultation.”

Client Testimonial
Access to Justice, 2025



WORKPLACE CAMPAIGN

Workplace Campaigns give employees an easy way to support community-wide impact. This year, over 50 local businesses participated, contributing over 20% of our annual campaign.

AT&T
AYS Employee Leasing
Best Buy Store # 816
Boys & Girls Clubs of IRC
Camp Haven, Inc.
Childcare Resources of Indian River
Children's Home Society of Florida
City of Sebastian
City of Vero Beach
Cleveland Clinic Indian River Hospital
Croom Construction Company
Dillard's Department Stores, Inc.
Drug Abuse Treatment Association
Economic Opportunities Council of IRC
Elliot Merrill Community Mgt.
Enterprise Holdings Foundation
Fellsmere Farms
Florida Floor Fashions
Florida Power & Light Company
George E. Warren Corporation
Gifford Youth Achievement Center
Gould Cooksey Fennell
Hibiscus Children's Center
Indian River County
IRC Clerk of the Circuit Court
IRC Property Appraiser's Office
IRC Sheriff's Office
IRC Supervisor of Elections Office
Indian River Habitat for Humanity
Jacoby and Handley, PLLC

Law Offices of Jennifer D. Peshke
Literacy Services of IRC
Manpower Group
Mental Health Association in IRC
Northern Trust
Nylacarb Corporation
Piper Aircraft, Inc.
PNC Advisors
Proctor Construction Co.
Publix Super Markets
Raymond James & Assoc.
Redlands Christian Migrant Association
Regency Windsor Companies
Riverside Theatre
Rossway Swan Tierney Barry & Oliver, P.L.
Samaritan Center
Schlitt Services
School District of Indian River County
Seacoast Bank
Space Coast Credit Union
Target
TD Bank
The Arc of Indian River County
The Hill Group
Thrive Indian River County
Treasure Coast Community Health
United Way of Indian River County
Visiting Nurse Association of the TC
Youth Guidance Mentoring Academy



2,245

Total clients across
four Self Help
locations



264

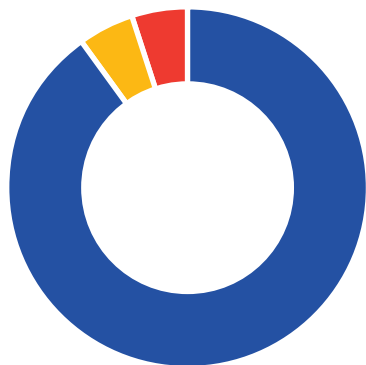
Consultations
125 Family Cases
139 Civil Cases



14

Pro Bono
Attorney
Volunteers

OUR FINANCIALS



With a commitment to transparency and thoughtful stewardship, United Way directs community contributions where they create the greatest impact. This past fiscal year, the Community Impact Fund supported 48 programs with a total of \$1.59M to advancing Health, Education, and Financial Stability for individuals and families across Indian River County.

5%
Fund Development
Expenses

90%
Community Impact
Expenses

5%
Management &
General Expenses

Income

Public Support & Revenue	\$5,716,206
Net Campaign Revenue	\$2,652,531
Community Response Fund	\$150,627
In-kind Contributions	\$240,011
Investments, Net	\$35,897
Other	\$2,637,140

Expenses

Community Support Services	\$4,846,663
Campaign Fund Development	\$273,609
Management & General	\$275,868
Total Expenses	\$5,396,140
Change in Net Assets	\$320,066
Net Assets, Beginning of Year	\$1,866,782
Net Assets, End of Year	\$2,186,848

OUR SPONSORS

TORCHBEARER SPONSORS

Cleveland Clinic Indian River Hospital
Indian River County
Merrill Lynch
Northern Trust
Publix Super Markets
School District of Indian River County
Seacoast Bank
Space Coast Credit Union
The Hill Group

ELITE SPONSORS

AMAC
Armfield Wagner, Inc. Appraisers
Florida Power & Light Company
Graves Brothers Company
Kmetz, Elwell, Graham & Associates, CPA's
Marine Bank
Schlitt Services
SouthState Bank

EVENT SPONSORS

AYS Employee Leasing
Bernard A. Egan Foundation
Bread & Butter Pickleball Company
Dean Mead Minton & Moore
GHO Homes
Gould Cooksey Fennell
In Motion
John's Island Real Estate
Kmetz, Elwell, Graham & Associates, CPA's
Marine Bank
Morgan Petersen Wealth Management
Northern Trust
Offut Barton Schlitt, CPA
PNC Bank
Publix Super Markets
Rehmann
Route 60 Hyundai
Schlitt Services
Seacoast Bank
Shambo Schwibner Schwartz
Wealth Management Group
Vero Beach Social Media



DISASTER RECOVERY FUND

After Hurricane Milton swept through our slice of paradise leaving unprecedented damage, many ALICE (Access Limited, Income Constrained, Employed) families were pushed past the edge of stability. United Way mobilized quickly to meet immediate needs through our Disaster Relief Fund. Working alongside our partners, we convened the community to stand up the Multi-Agency Resource Center (MARC). In just one week, more than 1,750 neighbors came through its doors for food, supplies, financial assistance, and critical services. Beyond immediate relief, United Way continues to galvanize resources and coordinate long-term recovery—helping families rebuild stability and hope after the storm.

\$250,000 - \$499,999

Indian River Community Foundation
John's Island Community
Service League
Marlynn and Bill Scully

\$100,000-\$249,999

Mr. and Mrs. Theodore W. Brickman, Jr.
Corbett Foundation

\$75,000-\$99,999

Indian River County Hospital District

\$50,000-\$74,999

One Anonymous Donor
Chris and Keena Clifford
Laraine K. Harrison Charitable Fund
Jay and Claire Robertson

\$25,000-\$49,999

One Anonymous Donor
Don and Mary Blair,
The Blair Family Foundation
Mr. and Mrs. D. Scott Deal
Head, Heart and Hands of
Indian River Club
Impact 100 of Indian River
Mr. and Mrs. Richard McDermott, Jr.
through the Indian River
Community Foundation
Mr. Arthur Jackson, Jr.

\$25,000-\$49,999 CONTINUED

Mr. and Mrs. Robert C. Puff, Jr.
Don and Patsy Riefler
Tommy and Simonetta Steyer
Mr. and Mrs. Peter M. Thompson

\$10,000-\$24,999

Jayne and Paul Becker
Mr. and Mrs. Dale P. Bennett
Duane and Dorothy
Bluemke Foundation
Burr Family Foundation
Mr. and Mrs. Philip Coviello
Mr. and Mrs. Alfred DeCrane, Jr.
Hamner Family Charitable Fund
Susan and Paul Hanson
Kanawah Fund
Jay and Linda Knoll
Mr. and Mrs. John La Duc
Wanda Lincoln
Betsy and George McFarland
Norris Family Fund
Mr. and Mrs. Ronald F. Rosner
Bob and Carmen Stork
United Way of Florida, Inc.
WPTV News Channel 5

Donor lists reflects only 2024-2025 Hurricane Milton Disaster Recovery Fund gifts and is not inclusive of Campaign gifts.



1,752

visitors served in one week at the MARC

\$1.95M

raised for relief and recovery efforts in Indian River County



728

families received assistance with rent, mortgage, and utilities



TOCQUEVILLE SOCIETY

With an annual gift of \$10,000 or more, Tocqueville Society members are creating a profound and lasting impact throughout Indian River County. Donations received from July 1, 2024 - June 30, 2025.

Thank you to our Tocqueville Society Event Sponsors, Northern Trust and John's Island Real Estate.

ORDRE D'ÉGALITÉ (\$50,000 - \$74,999)

Edward and Sherry Ann Dayton
Jim and Jean Kelly
Sharon and Bill Oglesby
Jack and Mollie Rogers
Ms. Patricia W. White

ORDRE DE LIBERTÉ (\$25,000 - \$49,999)

Duane and Dorothy Bluemke Foundation
Chris and Keena Clifford
Corbett Foundation
Bernard A. Egan Foundation, Inc.
Barbara D. Hauptfuhrer, in memory of Bob
Raymond J. and Sonia McGowan
Edward and Dawn Michael
The Jake Owen Foundation
Don and Patsy Riefner
Marlynn and Bill Scully
Mr. and Mrs. O. Griffith Sexton
King and Dace Stubbs through the
Indian River Community Foundation

* Donor list reflects only 2024-2025 Campaign gifts and is not inclusive of Disaster Response Fund donations

MEMBRES DE LA SOCIÉTÉ (\$10,000 - \$24,999)

Three Anonymous Donors
Norman and Ann Baker
Ms. Barbara Baldwin
Virginia and Timothy Beaulac
Susan and Dick Bergeman
William and Marcia Blackburn
Fritz and Gay Blaicher
Don and Mary Blair,
The Blair Family Foundation
Mr. and Mrs. Theodore W. Brickman, Jr.
Mr. Richard J. Canty and
Ms. Hope B. Woodhouse
Wendy and Chase Carey
Mary L. Casey
Amy and Cecil Conlee
Jane and Lorne Coyle
Marybeth and Chuck Cunningham
Gary and Donna Davis
David and Harriet Dyer
Dennis and Ellen Ferro
Janet I. & H. James Field, Jr. Fund
Four-Four Foundation, Inc.
Bill and Laura Frick through the
Indian River Community Foundation
Susan and Paul Hanson
Skip and Pat Hauser,
Hauser-Nuckols Family Foundation
Robert B. and Janet A.
Hoffman Foundation
J.M. Hopwood Charitable Trust
Timothy and Cynthia Hultquist
Mr. Henry K. Justi
The Kahle Foundation
Mrs. Fred Kasten
Ted and Debbie Kelly

Ralph T. King
Jay and Linda Knoll
Mr. and Mrs. John La Duc
Susie and Bill MacDonald
Betty MacMillan
Dennis and Karen Marlo
Robert F. and Eleonora W.
McCabe Fund
Marilyn P. McConnell
Betty and Jim McDonald
Guy and Kacy Mitchell
Charles and Susan Moritz
Chad and Lisa Morrison
Bob Morrison
Sharon and David Northrup
Jeffery Petersen and Maria Segura
Barbe Bonjour Pike/Otis G. Pike
Charitable Trust
Ed and Jan Pillard
Michael and Anne Rhoads
Marjorie Hopwood Richardson and
Danforth Kidd Richardson
Sandy and Randy Rolf
Lauren and John Roth
Susan and Larry Salustro
David and Betsy Sams
Mrs. Charles V. Sheehan
Anna Bain Slater
Mr. and Mrs. David Smick
Carl W. Stern and Holly Hayes
Andrew & Jean Taylor
Judith and Andrew Tucker
Mr. Gilford B. Walker,
Camp Younts Foundation
Robert Washburn
Michael and Susan White
The Windswept Foundation
Joan Woodhouse

LEADERSHIP CIRCLE

DIAMOND CIRCLE (\$7,500 - \$9,999)

Mr. and Mrs. Jonathan M. Clark
Mr. and Mrs. Christopher Kubasik
Mr. Jonathan McNeilly

PLATINUM CIRCLE (\$5,000 - \$7,499)

1 Anonymous Donor
Bill and Mary Ann Becker
Mr. and Mrs. David R. Cerchie

PLATINUM CIRCLE (CONTINUED)

Faith and Dick Coleman
John H. and Susan Dobbs
Ensio Family Foundation
Mr. and Mrs. Frederick P. Floyd
Andrew and Betsy Forrester
Mr. and Mrs. Bernard M. Freeman
Charlene A. Friedman
Richard J. Greene
Mary and Gordon Harnett
Mr. and Mrs. Richard M. Haverland
Mr. and Mrs. Christopher Hill
Kip and Mary Jacoby
Bob and Barbara Jones
Barclay and Dennis Kass
Ms. MaryMargaret Lucas
Sue Moody

GOLD CIRCLE (\$2,500 - \$4,999)

2 Anonymous Donors
Susan P. Adams
Linda Aiken, V.M.D.
David and Tina Banta
Jayne and Paul Becker
John and Jean Beckert
Mrs. Susan Bertolette
Ms. Carole Beecher Brown
Daniel Bryant
Mr. and Mrs. Robert E. Byrket
Mr. and Mrs. James Byrnes
Mr. and Mrs. Peter Calfee
Mrs. Barbara Cookson
Mr. and Mrs. Philip Coviello
Ms. Helan Cox
Mr. and Mrs. John F. Curley
Dick and Maryanne Davis
Katharine and Rohit Desai
Barbara and Dick Detwiler
Helen and Keith Drewett
David and Lynn Geiser
Michael and Lisa Giessert
Mrs. Mary P. Graves
The Hitt Family Foundation
Ginny & Lou Hoynes

Mr. John P. Moran
Mr. and Mrs. James J. O'Connor III
Dick Oehme
Mr. Michael Perez and
Ms. Barbara Edelstein
Gary Phillips
Ms. Bonnie Simpson
John and Terry Souza
Jane and John Todd
Jeff and Carol Twyman
Susan van der Stricht
Mr. Douglas K. Watson and
Ms. Susan Hunter
Andy and Robin Williams
Mr. and Mrs. B. Robert Wood

Dr. and Mrs. Leander Jennings
Mr. and Mrs. James Johnson
John C. and Mary P. Kurtz
Mr. William W. Lane
Mr. and Mrs. Robert P. Luciano
The Luther Family Foundation,
John and Nancy Luther
Barry and Robin MacTaggart
Mr. and Mrs. Alan J. Maguire
Ms. Brooke Megrue
Nancy and Dick Milsten
Mrs. Reginald B. Newman II
Mr. Raymond J. Oglethorpe Jr.
Patricia Perkins
Jeffrey Petersen and Maria Segura
Patricia Petersen
Mr. and Mrs. Robert D. Reisman
Jack and Penny Rohrbach
Mr. and Mrs. Frank C. Schroeder
Warren and Virginia Schwerin
Gordon and Linda Stewart
Mrs. Charlotte S. Stifel
Bill and Carolyn Stutt
Mr. John Titkanich
Mr. and Mrs. Sten Tonnessen

GOLD CIRCLE (CONTINUED)

Jennifer M Watson
Dr. and Mrs. Marsh Youngbluth

SILVER CIRCLE (\$1,000 - \$2,499)

21 Anonymous Donors
Jay and Judy Anglada
Dana & Nicolas Apfelbaum
Lois W. Appleby through
the Indian River
Community Foundation
Steve and Lucia Bailey
Mr. and Mrs. Stephen C. Bailey
Mrs. Samuel Bailey, Jr.
Chris Balter
Bob and Barbara Bandrimer
Sue and Kit Barrow
Mr. and Mrs. Linn Bealke
Mr. and Mrs. J. Scott Beckwith, IV
Jamie and Christy Bell
Mr. and Mrs. John D. Rusher III
Lisa Black
John and Carolyn Bowers
Zachary J. Brewer
Michael L. Briante
Nancy Briggs
Bryce A. Bronson
Cynthia Reason Broten
Gavin M. Brothers
Brian and Maureen Burkey
Mr. and Mrs. Michael Burns
Mr. Paul Carroll
Judi and Sam Carroll
Susan L. Chenault
Mr. Ernest Chevrette
Bill and Maryann Christie
Mrs. Rosalen E. Cline
Mr. and Mrs. Stephen C. Coley
Ms. Natacha Colfer
Bruce Colton
Dalton J. Comer
Chuck Cook
Mr. and Mrs. Russell J. Crossman
Kitty & Joe D'Agostino

Mr. and Mrs. Francis G. Ziegler
Stewart's Shops and
The Dake Family, a fund of
The Community Foundation for
the Greater Capital Region
Heather Dales
Patricia Daniels-Lindley
T Danis Charitable Trust
Riyad Deeb
Mr. and Mrs. Glenn J. DeSimone
Mr. and Mrs. J. Hugh Devlin
Chris DiBenedetto
Ann and John Dillon
Rene and Alice Donars
Mr. Michael D. Donovan
Jeanne M. Drenga
John and Patricia Dudzik
Francis Dugan
Sally and Don Dussing
Timothy A. Dyce
Russell Eddinger
Ron and Kathy Edwards
Meredith Egan
Thyra Elliott
Chris and Becky Ellis
Crystal and Jeff Ellison
Brad and Rebecca Emmons
Dalton N. Ensling
Steve and Mary Evans
Patrick Faucheux II
Mr. and Mrs. Gary S. Fischer
Mr. and Mrs. William Flatley
James and Hollis Forbes
Mr. and Mrs. William H. Friesell
Patti and Ted Frith
Jim and Marjorie Fulmer
Stephanie A. Gallagher
Mr. and Mrs. James W. Gardner
Katherine Garner
Mr. Charles E. Garris

SILVER CIRCLE (CONTINUED)

Mr. John O. Garrison
Daniel and Robin Glotzer
Joshua R. Greene
Robert and Melvena Grice
Mr. Donald Grinar and
Ms. Suzanne Whiddon
Nora and Madison Grose
Mr. and Mrs. Tyler Guettler
Mr. and Mrs. Charles J. Gulino
Mr. and Mrs. Herbert W. Gullquist
Jeannie Gustafson
Ms. Charlotte A. Hadley
Mr. and Mrs. Roger Haines
Mr. and Mrs. James H. Hance, Jr.
Sarah J. Hardin
Crystal S. Hart
Fagie Hartman
Mr. Hendrik J. Hartong, Jr.
Mr. and Mrs. Steven Hassur
Mr. and Mrs. William W. Heim
Kathy Hendrix
Susie and Dave Hentschel
Randy Hindert
Stuart and Mimi Hirstein
Douglas M. Hoffman
Mr. and Mrs. Edward K. How, Jr.
Mr. and Mrs. William N. Hudson
G. M. Hughes
Rick and Laura Hurley
Nat Jackson
Mr. Alan Jackson
Dr. Jacqueline E. Jacobs
Dr. and Mrs. Robert S. Janicki
Roger W. Jones
Elizabeth V. N. Judd
Ms. Courtney L. Julian
Dr. and Mrs. Garrick Kantzler
Linda and Bernard Kastory
Bob and Kate Khanna
Theresa and Jim Kilman
Michael and Sandy Kint
William and Valerie Kirk
Joseph A. Kowalczyk

Joseph D. Kuehl
Michelle A. Landreth
Shawn Marie and Chris Larsen
Joseph M. Laviolette
Mr. and Mrs. Alain Lebec
Ms. Martha G. Lemasters
Randall N. Lewis
Margo Lind
Mrs. Donald Lindell
Marco P. Lopez
Richard Lowry
Mrs. Barbara B. Lynch
Nancy and Roger Lynch
Mr. and Mrs. William P. Lyons
Leigh MacDougall
Melinda Marley
Sheila and George Marshall
James D. and Shirin K. Marver
Ed and Jo Massey
Mrs. William B. Matteson
Mr. and Mrs. Frank D. McCabe
Mike McGee
Mrs. William Ludwig
David and Tammy McLean
Alan and Ruthie McNally
Anthony B. McNeal
Ms. Cassandra E. Medina
Mr. and Mrs. Edwin Mellett
Jeremy W. Messersmith
Muffe and Taylor Metcalfe
Karen K. Meyer
Mr. and Mrs. Seth Milliken
Dr. George Mitchell, D.O.
Kyle and Debbie Morgan
Joseph E. Mullaney, Esq.
Rudolph and Andrea Muller
Edward Murphy, M.D.
Dr. Katie Nall
Mr. and Mrs. David Neithercut
Vernice E. Nichols
Mr. Edwin Offutt
Roberta Olsen
Mr. and Mrs. Robert P. O'Meara

SILVER CIRCLE (CONTINUED)

Ms. Christy Paoletta
Edward A. Parker Jr.
Deborah H. Peniston
Jim and Mary Buff Penrose
James D. Perry
Mr. and Mrs. Jonathan C. Peshke
Phillippe J. Pierre
Alan and Deborah Polackwich
Anne Posey
Mr. and Mrs. Theodore W. Price
Jesse L. Richard
Mr. and Mrs. Norman Rickard
Dillon Roberts
Mr. and Mrs. Talmage G. Rogers, Jr.
Mr. Stephen A. Rooks
Brad and Becky Rossway
Wally Royals
Alan and Christine Ryall
Mr. and Mrs. David Ryan
Mr. and Mrs. Joseph Schell
Bob Schlitt Jr.
Jeff and Cassie Schlitt
Jessica D. Schmitt
Mr. and Mrs. Robert A. Schneider
Carolyn and Bill Schrader
Mr. S. Van Zandt Schreiber
John and Kathi Schumann
Mrs. Julia Scott
Suzanne and Jerry Seldes
Mr. and Mrs. Andrew M. Senchak
Jerry and Mary Rita Sheehan
Mr. and Mrs. David C. Sherwood
Muddy Pond Trust Fund
Benjamin W. Sidorski
Sandy and Tom Slaughter
Scott C. Smith
Mr. and Mrs. Joseph E. Smith
Mr. James P. Smith
Mr. Daniel E. Somes
Karla and John Spooner
Michael and Doreen Sproule
Mr. and Mrs. David L. Squier

Cecelia Stalnaker-Cauwenberghs,
Cleveland Clinic
Diane and Norval Stephens
Mr. Jason Svitenko
Leslie & Mike Swan
Linda and Mel Teetz
Tom Tierney and Lisa Kahle
Mrs. James W. Titelman
Mr. and Mrs. William Tobin
Dr. and Mrs. Richard Tompkins
Sue and Chris Tompkins
Austin T. Touchberry
Mr. and Mrs. Jim Ueltschi
Robert J. Valentin
Linda Walton
Mr. and Mrs. Stephen H. Warhover
Laura E. Waters
Mr. Joseph Wauters Jr.
Brooke A. Weisman
Mr. Kenneth L. Wessel
Richard and Marsha Wheeler
Tiffany L. Wilder
Mrs. R. David Wilhoit
Robert Williams and Karen Katen
Dave and Bonnie Wilson
Mr. Freddie Woolfork
Ms. Jane W. Wykoff
Mr. Karl Zimmermann

Robin Lloyd
United Way
Supporter



BOARD OF DIRECTORS

- Margo Lind, Chairman
Seacoast Bank
- Sharon Northrup, Vice Chairman
- Mike McGee, Secretary
Morgan Stanley
- Peter Calfee, Treasurer
Calfee Financial
- Jessica Schmitt, CFRE, Staff
- Dana Apfelbaum
Dean Mead Minton & Moore
- Alex Batt
Warren Capital Management
- Meredith Egan (non-voting)
United Way of Indian River County
- Chris Hill
The Hill Group
- Stuart Hirstein
Saint Edward's School
- Dawn Michael
- Kyle Morgan
Nelson Morgan Wealth Management
- Merrill Lynch
- Dillon Roberts
Gould Cooksey Fennell
- Suzanne Seldes
Vero Beach Museum of Art
- Leslie Swan
Indian River County Supervisor of Elections



Margo Lind
Chairman

UNITED WAY FOUNDATION

Securing Tomorrow's Future

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.

At the beginning of Fiscal Year 2024, the United Way Foundation had \$6.6 million in assets under management with another \$6 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 United Way of Indian River County.

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) 567-8900.

Please find copies of our IRS 990 and our most recent audit at UnitedWayIRC.org



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	\$18,000
Investment Return, Net	\$764,269

Total

Public Support & Revenue	\$782,269
--------------------------	-----------

Expenses

Community Support Services	\$177,320
Endowment Operations	\$134,505

Total Expenses	\$311,825
Change in Net Assets	\$470,444
Net Assets, Beginning of Year	\$6,444,160
Net Assets, End of Year	\$6,914,604

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 Tocqueville Society. Each year, the Foundation will make a gift the annual campaign in their names in perpetuity.

TOCQUEVILLE LEGACY CIRCLE (\$10,000+)

- Fred M. and Gay C. Blaicher
- Dick and Sally Brickman
- Chris and Keena Clifford
- Edward and Sherry Ann Dayton
- Ralph T. King
- Jay and Linda Knoll
- Betty and Jim McDonald
- Edward and Dawn Michael
- Lee and John Moore
- Marjorie Hopwood
- Richardson and Danforth
- Kidd Richardson
- Sandy and Randy Rolf
- David and Betsy Sams
- Marlynn and Bill Scully

LEADERSHIP LEGACY CIRCLE (\$1,000-\$9,999)

- Norman and Ann Baker
- Bill and Nancy Curtis
- Chris and Don Loftus
- Jim and Melinda Marley
- Chad and Lisa Morrison
- Joseph Mullaney
- Dr. Julie Vargo and Dr. David O'Brien
- Daniel and Karen Somes
- Mr. and Mrs. Norval B. Stephens, Jr.
- Peter and Terry Sullivan

The following companies, private foundations, and individuals have 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.

LEGACY SOCIETY

43 donors who wish
to remain anonymous
Fran Adams
Valerie and Douglas Anderson
The James G. and Ellen C. Andrews
Revocable Trust
L.W. Appleby Revocable Trust
Eve Ballance in honor of Norma Lister
Edward C. Bamberg
Alan Bartol
Robert W. Bauchman
Lea Beadle Charitable Fund
Sandra Block in honor of
Barbara C. Block
Clair Brunetti
Mr. and Mrs. Anthony Buford, Jr.
Michael and Miriam Burns
Donald R. and Myra J. Burns
Doris Land Butler, in loving
memory of Grace R. Byrd
Peter Roy Carney
Richard Canty and Hope Woodhouse
John "Jack" Chamberlain
Susan L. Chenault
Mr. and Mrs. J. Warner Clark
P. Ross Cotherman, CPA
Jane and Lorne Coyle
Carol Crittenden
Mr. and Mrs. William C. Cummings
Marybeth and Chuck Cunningham
Oscar H. and Helen L. Curry
Curtis Ward & Associates, PA
Dr. and Mrs. William M. Cutler
Alice and Rene Donars
Mr. and Mrs. Hamilton R. Duncan
Mrs. Stewart A. Dunn
Mr. and Mrs. David W. Edwards
Robert R. Elser and
Mary Lou Commerford
Mr. and Mrs. Jack L. Ernsberger
Mr. and Mrs. Kenneth D. Felten
Dennis and Ellen Ferro
Henry Patrick Fitzgerald
Mr. and Mrs. William O. Fleming
Florida Power and Light
Gifford and Ellen Foley
Mr. and Mrs. John B. Ford III
Faith G. Frazier
Jim and Jennifer Gabbard
Priscilla and Dick Gavoort
Mrs. John R. Gould
Gracewood Fruit Company
Norva Z. Green
Lynn Hall
Marilyn Hammond
Jay W. Hart
Henry Patrick Fitzgerald
Mr. and Mrs. William O. Fleming
Florida Power & Light
Gifford and Ellen Foley
Mr. and Mrs. John B. Ford, III
Faith G. Frazier
Jim and Jennifer Gabbard
Priscilla and Dick Gavoort
Mrs. John R. Gould
Norva Z. Green
Lynn Hall
Marilyn Hammond
Jay W. Hart
Margaret Harvey
Bill and Carolyn High
Mr. and Mrs. Don R. Hinkley
John and Mary Hobart
John H. Holliday and Phyllis B. Holliday
Richard and Lucy Hope
J. M. Hopwood Charitable Trust
Mr. and Mrs. William B. Howell
William K. & Barbara W. Howell
Henry H. Hoyt, Jr.
Allen and Ann Hubbard
Mr. and Mrs. William Y. Humphreys
Indian River National Bank
Ilain Isaac
Mr. and Mrs. Richard S. Jackson

LEGACY SOCIETY (CONTINUED)

Kip and Mary Jacoby
Downing Jenks Charitable Trust
George and Sandy Kahle
The Kahle Foundation
Michael and Sandy Kint
William N. Kirk
Mr. and Mrs. F. Curtis Lane
Bobby and Lynn Lindsey
John J. and Francesca W. Logan
Mr. and Mrs. William E. Lower
Marcia P. Lunka
John and Nancy Luther
Alma Lee Loy
Ursula Ma
Michelle and Josh Malyn
Ron Mather
Mr. and Mrs. Thomas Manwaring
The Estate of Stanley T. Manzer
Joseph L. and Sarah S. Marcum
Dennis and Karen Marlo
Ed and Jo Massey
Walter J. and Mae S. Matthews
Charles O. McKenzie
Mildred D. McMichael Trust
David and Claudia McNulty
Dr. and Mrs. Roger Meyer
Mrs. Helen F. Miller in memory of
Danforth Miller, Jr.
Manley H. Mitton Trust
David Mixter and Carol Baldwin
John E. and Lee R. Moore
Mr. and Mrs. Charles W. Moritz
NextEra Energy Foundation, Inc.
The M. J. O'Brien Family Foundation
Anonymous Gift in Living Honor of
Ralph and Jane King
O'Malley and Siedler Families
Beverly B. O'Neill
Mr. Richard W. Paull
Raymond W. Paulsen
Bill and Karen Penney
Raymond T. Perring
William and Mary Phelan
Deborah Morrell Polackwich and
Alan Polackwich
Dan and Joan Preuss
Mr. Clay Price
Jerome D. Quinn
Estate of Clarence W. Redstone
Mr. and Mrs. Robert D. Reisman
Richardson Foundation
Mr. and Mrs. C. Graydon Rogers
Hugh Rosaaen
Mrs. Katherine H. Rose
Brad and Becky Rossway
David and Betsy Sams
Mark and Carolyn Sanchez
The Schumann Foundation
Mr. and Mrs. John Schumann, Jr.
Marlynn and Bill Scully
Mr. and Mrs. John C. Scully
Thomas and Charo Segura
Mr. and Mrs. David Shapiro
Fred and Jean Sirianni
Peggy and John Sirich
Matthew J. and Anne B. Smith
Leroy Smith
Louise L. Smith
Mrs. Margaret A. Smith
Mr. and Mrs. Benjamin F. Stahl, Jr.
Estate of Florabel L. Stevens
Norman W. and Ann R. Stewart
Tommy and Simonetta Steyer
Rosanne and Jeffrey L. Susi
Leslie and Michael Swan
Lois and Jim Thompson, in honor of
J.A. "Coach" Thompson
Mr. and Mrs. Mark Thurn
Mr. and Mrs. Charles M. Travis
Estate of Helen M. VanBlarcum
Mary Beth Vallar
Deborah Vickers
James and Faith Victory
Christine and Mike Videtic
Ethel M. Wasmuth Trust
Karl E. Wenk, Jr.
Lewis Stanley and
Myrna Newell Whitaker
Kent and Judith Whittaker
Elizabeth Whittall
Andy and Robin Williams
Archie S. Wingfield, Jr. Charitable Trust
Henry and Joan Woodhouse

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.

MEMORIAL GIFTS

Louis Allocca
Elliot A. Baines
Jesse Loy Baldwin
Kathleen Branca
Elmer T. Browne
Margot Coleman
Dorothy Coufos
Archie T. Croteau
Mr. Charles E. Davis, Jr.
Olga Draper
Ellen Ann Dunham
J.B. Egan III
Charles V. Fenn
Thomas Fratar
Lynn Hall
Bill Hamlin
Hayden Harlow
Doris Hardesty
Mabel B. Harris
Mr. Forrest Haselton
Mr. and Mrs. William B. Howell
Benjamin Jaques
Charles R. Johnson
Ruth Karpf
Ray Kempkin
Ralph King
Thomas A. Lewis
Jon W. Ludwig

J. Albert Marshall, Jr.
Walter J. Matthews
John McConnell, Sr.
James Orr McCue, Jr.
John C. Metzger, Jr.
Danforth Miller, Jr.
Jim Milliken
Fils-Hime Naus
Martin G. Noon
Kay and Walter O'Malley
Christy Pappadouplos
C. Gorham Phillips
Alphonsus Polackwich
Jack W. Price, Jr.
Mitchell Rendell
Elizabeth M. Rich
Charlotte Anne Rolfe
William Romanowski
Marguerite Schlitt
Tom Segura
Marguerite Lydia Shattuck
Jean Sirianni
Trevor Smith
Jane Osborne Stoddard
Virginia Wollenzin
George Wonderly
Joseph Zemke
Ruth M. Zimmer

CREATE IMPACT THAT LASTS

Learn more about endowed giving through the United Way of Indian River County Foundation.

Meredith Egan, CEO

(772) 567-8900, ext. 125

Meredith.Egan@UnitedWayIRC.org

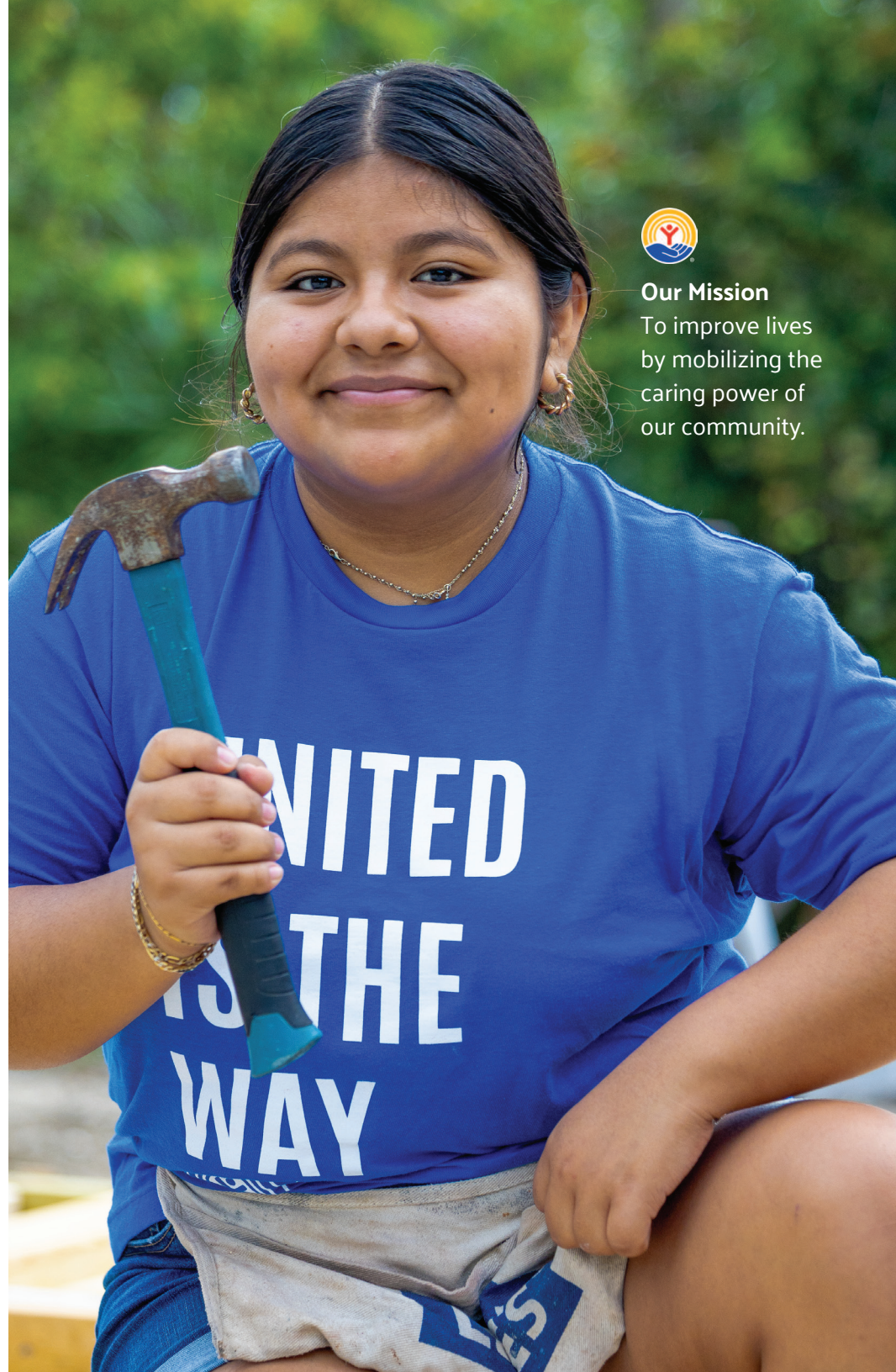


Donate and Learn More at
UnitedWayIRC.org



Our Mission

To improve lives
by mobilizing the
caring power of
our community.





UNITED WAY
Indian River County

1836 14th Avenue, Vero Beach, FL 32960
(772) 567-8900 | UnitedWayIRC.org
[@UnitedWayIRC](#)

