

Greater
ALLIANCE
FOUNDATION
FOR GOOD, FOR ALLIANCE, FOREVER

Together

Quarterly

A Charitable Remainder Trust: Celebrating the largest gift in our history



Geraldine Burnell-Brotsman and son Ted

One of our own, a generous woman, Geraldine Burnell-Brotsman was born in 1921 and lived in Alliance for a portion of her adult life. A reserved lady who came from humble beginnings, she was surrounded by a full and rich family life. Her brother, Romane Burnell, was a well-known Alliance architect and philanthropist. Geraldine's life of 49 years was not long, but her family's influence was powerful.

Geraldine's father Rue Burnell was a country minister who, like most pastors at that time, supplemented his income by working outside of the church as he pastored his flock. The family moved about the country as Pastor Burnell was called to various congregations, but finally settled in the Alliance area where he pastored at the Christian Church in Westville, Ohio. During this time, the family had a small dairy farm and grew fruit and vegetables which they sold to supplement the limited income of a pastor.

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Celebrating the largest gift in the history of the Greater Alliance Foundation

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During her early years, Geraldine had to overcome not only the challenges of being a “P.K.” (preacher’s kid) in a large family, but also the challenges of one major health issue after another. In spite of her medical challenges, Geraldine persevered.

Geraldine worked at McCaskey Register Company in Alliance. She had a disappointing marriage that did not last, however she was blessed with a son – Theodore. Over the coming decades, it became obvious to Geraldine that her son faced similar medical problems and had limitations as her own. She inherited funds from her uncle and mother before her passing in 1970 and she was able to secure her son’s financial future by establishing a trust. Geraldine also had the foresight and desire to provide for others who faced similar challenges by directing the remaining funds in the trust to be given to charity.

After Geraldine’s son Ted passed away in 2020, the remainder of the trust she established to support him came to GAF in the amount of \$2.6M. This is the largest gift in our history and as a result, the legacy of the Burnell-Brotsman family continues in perpetuity.

Geraldine had an interesting family heritage, and two stories were recently shared by family members Bruce Swallen, Gary Burnell, and Juli Burnell:

In WWII, Geraldine’s Uncle Unca Whitacre from Missouri invented the process of solderless electrical connections and subsequently founded a company called AMP which grew to be the largest producer of solderless connectors in the world. This type of connector revolutionized the industry and is still found in almost every electric device produced. It advanced the war effort by eliminating the need for soldering of aircraft harnesses and large machinery.

Geraldine’s great grandfather served as president of Union Christian College and was a state senator for a time in Missouri.

Our message to Geraldine: We will honor you by providing exceptional and responsible stewardship of the gift that you left to better our community and will proudly carry on your family legacy which is so impactful and far-reaching.

Thank you Geraldine!

A fond remembrance from nephew Bruce Swallen: “By God’s grace, Geraldine’s latter years were filled with joy and well being. She found a rewarding job, and was able to enjoy her family, and friends, and coworkers up to the time that God took her home to His Heaven.”

Alliance Area Development’s Relocation is Debt Free

Did you know that area non-profits can establish an agency fund with GAF with their reserved funds? It can be difficult for our local charitable organizations to build reserves. An agency fund allows assets to gain greater diversification of investments than they could independently, while minimizing the administrative time and expense. The Alliance Area Development (AAD) knows first-hand the benefit of an agency fund at the foundation.

In February 2006, the AAD under the leadership of Tom Pukys established an agency fund at the GAF and placed \$40,000 into the fund. This past summer, current president, Rick Baxter, envisioned creating a larger up-to-date office to provide economic development incubator space for start-up businesses. He knew AAD could bring the project to fruition because their agency fund had grown through the years to almost \$100,000.

Using approximately half of the funds, AAD completely renovated the former Time Warner office space on East Main Street next to the Alliance Area Chamber of Commerce.



Rick Baxter, President of AAD

Baxter said, *“AAD’s previous board members had the foresight to set aside funds with the Greater Alliance Foundation. Through the growth of our agency fund, we were able to upgrade our office, give area entrepreneurs support, and leverage our collaborative ability with the Chamber to strengthen our business community. Plus, we have money left in the agency fund that will remain in GAF’s corporate pool of assets when other opportunities arise.”*

As demonstrated by AAD, an agency fund is a flexible and simple way for our hard-working local non-profits to build funds for a project or future need. Congratulations to the Alliance Area Development with their new office and the opportunities it will create for our area companies.

For more information on how your organization can establish an agency fund at our local community foundation, contact Linda S. Ferguson at 330-823-8560, lfergason@greateralliancefoundation.org.

A Designated Fund to Honor the Gemplers



Bob and Arlene Gempler

In 2003, Bob and Arlene Gempler began to enjoy a fixed lifetime of payments and realized a significant tax deduction by establishing a Charitable Gift Annuity (CGA) with us. Both Bob and Arlene were Alliance natives and had a love for their hometown. This was reflected by their wide-spread commitment to our community and this planned gift.

Bob worked for 39 years for Alliance Machine Company, retiring as President of Purchasing. He kept busy as a member of Filibusters, Kiwanis, and Toastmasters and was an avid

golfer at the Alliance Country Club. Arlene was equally committed to the Alliance Women's Club as a board member, the Alliance Community Hospital Auxiliary, Eastern Star Chapter #296, Mount Union Woman's Club, Panhellenic, Coterie and Sorosis. They both were lifelong members of First Immanuel United Church of Christ and served with their hands and heart. Arlene passed away in 2005 and Bob lived another 15 years receiving income from their CGA.

To memorialize this couple's dedication to our community, the GAF Board of Trustees decided to designate their gift and establish the Robert and Arlene Gempler Education Fund with the remainder of the annuity. This fund will provide additional dollars each year for educational grants along with the Stuckey Education Fund established by Arlene's brother, Art Stuckey.

More than 18 years ago, the Gemplers decided to manage their assets wisely and planned for future charitable giving.

"This beloved couple is now honored by the establishment of an educational fund that will lend dollars to important programs such as One Book One Community, Dolly Parton's Imagination Library, Early Childhood Education Alliance (ECEA), the Alliance Works Scholarship through Stark State College, classroom grants for teachers, and many more."

—Douglas R. Schwarz

Bob and Arlene had community minded spirits and now their philanthropic arm will reach into Alliance's future through educational opportunities for our residents. They continue to be remembered well by us and our community.

Thank you Bob and Arlene!

Lavery Automotive



Bill Lavery

Bill Lavery of Lavery Automotive Sales and Service recently made a gift to the Greater Alliance Foundation's Community Response Fund for COVID Relief. According to Bill, during the holiday season the Canton Auto Dealers Association allowed his dealership to select an organization to contribute toward financially.

Bill said, *"This year, GAF came to mind because of their leadership and responsiveness during the pandemic. I know GAF has and continues to use the money for current needs in our town. I have seen and continue to believe in their ongoing efforts in the Alliance community and they have especially stepped up during COVID. Thanks GAF for the impact you continue to make in our community."*

COMMUNITY RESPONSE FUND

\$43,347

Our Community Response Fund has assisted 13 local charities

It's not too late to help!

Consider making a gift to the CRF to aid those charities in need who provide basic human needs to our community during this continuing pandemic. COVID has a long-reaching ripple effect on our financially disadvantaged population.

Donate now

Visit [GreaterAllianceFoundation.org](https://www.GreaterAllianceFoundation.org) and specify Community Response Fund.

In Celebration of Friends of the Greater Alliance Foundation Carl and Martha Jean “Nickie” Orwick

GAF celebrates a wonderful couple – our community friends Carl and Martha Jean “Nickie” Orwick. We remember them as ‘a smiling couple filled with joy and enthusiasm’ and make special acknowledgement of a gift that was recently received by GAF from the Orwicks by way of a Charitable Remainder Trust at the University of Mount Union.

Carl, a Navy Veteran of WWII, was decorated with a Victory Medal and American Theater Ribbon, and his wife Nickie also served in the United States Marine Corps in WWII. The discipline and pride of serving in the military was a big part of the Orwicks’ character, and this carried over to their family, the church, and how they served the Alliance community, as well. They gave back ...with pride and devotion.



Carl and Martha Jean “Nickie” Orwick

The Orwicks’ community involvement was extensive. Christ United Methodist Church, YMCA, YWCA, VFW, Community Concert Association, Mount Union Century Raiders and Kiwanis Club were some of the organizations where they provided leadership and where they devoted their time and energy. Both attended Mount Union and were active in Greek life on campus (Alpha Tau Omega and Alpha Chi Omega). Carl was also the Chairman of the Board of the McConnell Insurance Agency and was a board member of Charter One Bank.

Carl, who passed away in 2011 at the age of 90, graduated from Alliance High

School and Mount Union College. Nickie, who spent most of her life in Alliance, also attended Mount Union College and passed away in November of 2020 at the age of 97.

It is with fond memories of Carl and Nickie that we acknowledge their recent gift. The Greater Alliance Foundation will provide responsible stewardship for its use.

Thank you Carl and Nickie!



Linda Ferguson joined our community foundation as Director of Donor and Community Relations this past fall. During her 38-year career in the non-profit sector, Linda has impacted communities in the Stark and Portage County areas through her charitable fundraising efforts. She brings experienced leadership and strategic purpose now to our local community foundation that will benefit the greater Alliance residents and businesses.

When you reach out to Linda, you will find a warm and easy person to talk with who has the knowledge to help you achieve your philanthropic desires. Her expertise in helping you and your professional advisors find the right avenue to meet your personal circumstances and best tax saving strategies is what she enjoys the most.

Plus, for those that serve in a leadership role at one of our local non-profits, Linda can share ideas that could help you grow your charitable dollars.

“I am thrilled to work for GAF to give back to the community where my family and I have spent our entire lives – doing what I love!”

- Linda S. Ferguson

Recent Grants



\$16K



21st Century and STEM grants for teachers' individual classrooms



\$40K



Early Childhood Education Alliance
Educate - Advocate - Collaborate

Operations in providing quality early education for kindergarten readiness



\$15K



Financial assistance for adults in developing career pathways



Alliance Pregnancy Center New Kitchen

\$21K



Capital improvements including their new kitchen



The GAF Trustees sponsored the Alliance Pregnancy Center's new kitchen and honored Heidi McClung's work as office manager with the foundation over the last 8 years.

"Our community foundation is unique and encompasses the true meaning of serving others. This gesture on behalf of the trustees was an honor and I am happy to be a part of making an impact on the lives of others."

-Heidi McClung

Our Partnership with Professional Advisors

The Greater Alliance Foundation was established as a community foundation in 1999. Since our inception, we have remained true to our mission to strengthen the greater Alliance community by serving and connecting people, resources and needs through philanthropic giving.

**We currently manage \$23.1 million in assets
and have a portfolio that includes 61 funds and scholarships.
Last year, we received \$1.3 million in gifts from our donor
family and awarded over \$1 million in grants.**

Professional Advisors are Key

We recognize and respect the role of professional advisors in creating charitable giving plans for your clients. As a community foundation, GAF is a very cost-effective alternative to a private foundation. A partnership with GAF will provide resources that will help address a family's philanthropic and financial goals, and your relationship with your client will be primary.

Opportunities

GAF can help you show your client exciting options regarding their family legacy, creating a philanthropic vision and making suggestions to protect their charitable assets.

Our staff is experienced and accessible. Whether creating an estate plan, using inherited dollars, or assets from the sale of a business, we can help you work efficiently with your clients. We can assist you to present various scenarios to your clients in a way that is meaningful to their overall goals, and in a manner that is friendly and inspiring.

Streamlined and Efficient Services

We can help your client discover various charitable planning vehicles that have great benefits, including charitable gift annuities and charitable remainder trusts that provide an ongoing stream of income. In addition, GAF is the conduit through which your client can make grants to the charitable organizations that they are passionate about by establishing a fund with the foundation. Your client can choose from different types of funds including donor designated, field of interest, donor advised, scholarships and more.



We will also streamline all of the paperwork and be responsible for reports to the fund holder, tax filings, and other administrative functions related to grants or pay-outs.

We Accept a Wide Range of Gifts

GAF has the unique ability to accept many types of gifts including cash gifts, stock transfers, life insurance, real estate, and planned gifts to name a few. By using GAF to develop charitable giving strategies, your client will receive the maximum tax benefit.

Knowledge of Local Non-Profits with Solutions to Community Problems

GAF has in-depth knowledge about our local non-profits and programs that are effectively addressing community issues. GAF will provide information about needs in the Alliance area and can personalize a grant-making process for our fund holders.

**For more information about how we can
assist you, please call 330.823.8560**
