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A Sense of Communities

Newsletter of the Community Foundations of the Hudson Valley serving Dutchess, Ulster, and Putnam Counties

Local giving. Local impact.

Red Hook couple chooses Northern Dutchess Fund now and for the future

“We just felt that this was the right cause, the right place and the right time to give.”

— Jeff Martin



Michelle, a member of the Community Foundation’s Professional Advisors Council, likes the opportunity for the hands-on involvement we offer. “It’s one thing to see someone else doing something, it’s another thing entirely to get involved and do it yourself.”

Perhaps Jeff said it best, “We just felt that this was the right cause, the right place and the right time to give.”

For more information on the Northern Dutchess Fund, contact Christine Kane, Vice President at 845-452-3077 or ckane@cfdhny.org.

Please remember us in your will and trusts.

Finances and Widowhood: “Moving Forward on Your Own”

June 11th at The Grandview in Poughkeepsie, 10:30 am to 1:30 pm

Please join us as renowned author and speaker Kathleen Rehl, Ph.D., CFP, will be the featured speaker at a woman’s luncheon on Tuesday, June 11th at The Grandview in Poughkeepsie.

Dr. Rehl is a leading authority on the subject of widows and their financial planning needs. She’s frequently invited to give presentations around the country—designed for widows, their families and friends.

Kathleen’s world changed forever when her husband died. Five weeks later her widowed mother also passed. From her personal grief experiences, Kathleen’s life purpose evolved—helping widows to feel more secure, enlightened and empowered about their money matters. She is passionate

about assisting her “widowed sisters” take control of their financial future.

With the Hudson River as a backdrop, Dr. Rehl will conduct an informative and interactive workshop addressing issues of grief and decision making, monetary mistakes and how to prepare for the “issues of the heart” and your future. Copies of her book, *Moving Forward on Your own: A Financial Guidebook for Widows* will be available for purchase.

The cost for the luncheon is \$20.00 per person. Check-in begins at 10:30 with the program running from 11:00 to 12:30 followed by a seated lunch. This event is sponsored by Taconic Advisors and McCabe & Mack, LLP.

Professional Advisors: If you’d like to update your knowledge of



financial issues particular to the financial situations of widows, please join us for a special breakfast meeting with Ms. Rehl, also on June 11th, starting at 7:30 am. \$25 per person, CLE and CFP credits are available.

For more information on tickets and reservations for either event please visit our website, www.cfdhny.org or call us at 845-452-3077.

Family, friends and community are the foundation of Jeff and Michelle Martin’s life. With five children and two businesses (he’s a lawyer in private practice and a town judge, she owns RiverStone Wealth Management), numerous volunteer commitments and family roots in Red Hook that go back for 13 generations - when they say that the local community is important to them, you know they mean it.

So, when Jeff and Michelle learned about the Northern Dutchess Fund at our affiliate, the Community Foundation of Dutchess County, they “just knew” it was the right option for them.

“The Community Foundation is so inclusive,” said Jeff. “It’s all different people, from different backgrounds, with different stories; all coming together for the good of our local communities. That’s very powerful.”

The Northern Dutchess Fund was started in 2007 by an anonymous donor who,

with a group of community members, wanted to build a permanent endowment to improve the quality of life for residents in Clinton, Milan, Red Hook, Rhinebeck, Pine Plains, Staatsburg and Stanford. The Fund will serve as an ongoing resource that can look across town borders and attract additional support to achieve maximum benefit for residents of the region.

The Martins have been looking for a way to take their community giving to the next level for some time. By joining the Northern Dutchess Fund Founder’s Circle they’re pooling their gifts with others to create a greater impact, while still keeping it all local. They made a five-year pledge to the fund so they, and their children, can witness the positive impacts that Northern Dutchess Fund grants will have.

One of the reasons Michelle and Jeff gave now is, “Giving back to our community is part of our family culture. Our children will be in the next generation of philanthropists. And we believe in teaching by example.”

New Funds at the Foundation

More than 530 individuals, families, businesses and nonprofits have chosen the Community Foundation to help them accomplish their charitable giving goals. Below is a list of funds, whose founders and donors recently placed their trust in us.

- David Butler Memorial Fund
- Digestive Disease Center Charitable Fund
- John and Gloria Golden Fund for Hyde Park
- Hudson Valley Guns and Hoses Fund
- Kim Anne Pedersen Memorial Scholarship Fund*
- Premier Cares Foundation Fund
- Premier Cares Foundation Grant Fund
- Roosevelt-Vanderbilt Conservancy Fund

* Community Foundation of Ulster County Funds
Community Foundation of Dutchess County Funds (no mark)



Andrea Reynolds and Tim Dean

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In Dutchess and Putnam, 845.452.3077 In Ulster, 845.338.2535

www.cfhvny.org

Your First Resource for Everything Charitable®

Dear Friends,

One of our biggest challenges is explaining exactly what a community foundation does. We're sure many of you are hard-pressed to do the same. It's never as simple as saying one phrase such as, "We help people to happily give their money away," or "We provide funding to hundreds of nonprofits," or "We help make thousands of peoples and animals lives better," or "We work with other funders to provide meaningful programs to local organizations," or "We work with professional advisors to create an optimal charitable giving plan for their clients to achieve their philanthropic goals and offset taxes."

The truth is we do all of that and more. People, businesses and nonprofit organizations come to us to carry out their charitable goals, and it's our job to figure out the best way to accomplish that.

As you will see in this newsletter, there are numerous examples of how we carry out our mission. Sometimes it involves a number of people coming together for a common goal, improving the quality of life in a specific area such as Northern Dutchess County or providing grants to teachers to improve educational opportunities for our youth. Sometimes it involves one individual, family, business or organization with very specific interests they want to support, so they individually open funds to do just that.

Bottom line: The Community Foundation is "Your first resource for everything charitable®," so if we can ever be of assistance with developing your charitable giving goals, please contact us.

Thank you for all you do for our communities,

Handwritten signature of Tim Dean

Tim Dean, Chair Board of Trustees

Handwritten signature of Andrea Reynolds

Andrea L. Reynolds President and CEO



Upcoming Events

May 23rd Professional Advisor Council Breakfast Poughkeepsie Grand Hotel

Mark your calendars for the Community Foundations of the Hudson Valley Annual Professional Advisor Council Breakfast. This year's honorees are John J. (Jack) Cina of D'Arcangelo and Company and Robert J. Ryan, Jr. of Ryan & Ryan Insurance for their dedication to the communities they serve. Registration opens at 8:00 am.

For additional details and to reserve your seat, please see our website, www.cfhvny.org or call 845-452-3077.

May 30th Partnership in Education Reception Poughkeepsie Grand Hotel

Join over 150 people at this annual event, where we'll award more than \$75,000 in grants and scholarships.

At the reception, we'll present:

- Fund for Excellence in Education Grants to Dutchess County school teachers to recognize the important contributions they make in improving learning opportunities for students; Taconic IPA Science Equipment Teacher Grants to educators from Dutchess, Orange and Ulster counties; Scholarships to students to assist with their college education.

The awards reception will also showcase the impact of these grants by former recipients.

The hors d'oeuvres reception begins at 5:00 pm and will be followed by the program and a seated dessert. Tickets are \$35 each with a cash bar.

Please visit the Foundation's website, www.cfhvny.org for more information. We hope to see you there!

June 11th Financial Planning with Widows - the Professional Advisor's Role The Grandview

Hosted by Community Foundations of the Hudson Valley and sponsored by Taconic Advisors and McCabe & Mack, LLP, this breakfast program is designed for Financial Advisors, Attorneys and Accountants who are currently working with widows in their practice or who would like to update their knowledge in this area. The program will feature Kathleen Rehl, Ph.D., CFP, noted author and authority on widows and their financial planning issues. Registration begins at 7:45 am, followed at 8:00 am by a one hour breakfast presentation, with questions to follow. CLE and CFP credit will be available.

Topics to be covered include actuarial statistics, common money pitfalls, and situations where a professional advisor's recommendations and advice can be helpful.

The cost is \$25.00 per person for breakfast. For more information and to reserve your place, visit our website, www.cfhvny.org or call 845-452-3077.

Save the Date!

2013 Garden Party Sunday, October 6th • 3 - 6 pm All Canter Farm, Stanfordville, NY

Honoring: J. Joseph and Mary McGowan Glenn B. Sutherland and Cynthia A. Lowe

Honorary Co-Chairs: Danny and Nancy Aronzon • Bill and Tildy Davenport