



## January News and Updates



### *Top Accomplishments of 2017*

- The Commission staff has participated in and provided data support for Tupelo's Grade Level Reading Coalition.
- Contributions are approximately \$12.5 million for the year.
- 2017 was again an outstanding year for endowment fund growth with 19 new funds established for a total of 206. This is the highest number of new endowments in any one year. The endowment fund balance exceeds \$84 million.
- \$250,000 grant award initiative was approved by the Toyota Wellspring

Committee for school districts to develop innovative proposals for career awareness and readiness projects.

- A \$1.5 million dollar grant initiative from Toyota Wellspring Education Fund for S.T.E.A.M. (Science, Technology, Engineering, Arts, Math) was announced at the annual meeting. This funding will be provided over three years.
- The "Imagine the Possibilities" Career Expo included all 17 CREATE counties. During the three-day event, 7,200 eighth grade students from 75 schools attended the expo. In addition, the event was open to the public on the second day, and there were over 1,000 teachers and 700 volunteers involved.
- The Tupelo/Lee County Foundation hosted a successful "A Night for A Hand Up" event with 22 organizations and 200 people participating. A major effort was launched to conduct a comprehensive study of food insecurity in Lee County. The Tupelo-Lee County Hunger Coalition was formed in partnership with United way of Northeast Mississippi. A \$100,000 challenge grant was made to the affiliate to begin the process of building an endowment fund.

## *New Funds Established in 2017*

### **SCHOLARSHIP FUNDS**

- Young Law Group Scholarship Fund
- Specialty Orthopedic Group Scholarship Fund
- Sharon Keeton 70 x 7 Forgiveness Scholarship Fund
- Robbie Buford Scholarship Fund

### **ENDOWMENT FUNDS**

- Rhonda Hanby Family Endowment Fund
- First Regional Library – Oxford Trust Endowment
- Nettleton High School Bible Class Scholarship Endowment
- Jim Williams Follow and Fight Memorial Scholarship Endowment
- Henry Miller Endowment Fund
- Glen and Paige Evans Family Endowment Fund
- Lee County Library Youth Endowment Fund
- Thacker Mountain Radio Endowment Fund
- Halfway Home Animal Shelter Endowment Fund
- The Corinth-Alcorn Animal Shelter Foundation
- Calhoun City Rotary Club Endowment Fund
- Mississippi Entomological Association Endowment Fund
- Claude and Gussie Roebuck Memorial Endowment for St. Luke

### **DONOR ADVISED FUNDS**

- Imbler Foundation Donor Advised Fund
- Joe and Lauren Babb Advised Fund
- Brasfield Family Advised Fund
- Ernest Joyner III Advised Fund
- Zeke and Karen Hodges Advised Fund
- Allan H. Tucker or Barbara H. Tucker
- Amanda Kathleen B. Dalton and Frank Trice Dalton Advised Fund
- Karen Taylor Advised Fund
- Tom and Fredda Robinson Donor Advised Fund
- Jason B. Dees Advised Fund
- Catherine "Kitty" Bryan Dill Advised Fund

### **SPECIAL PROJECT FUNDS**

- Itawamba County Bicentennial Celebration
- Amory Police Department K9 Program
- The Good Samaritan
- Amory Fire Department ATV Fund
- Operation Fit Nation
- Hope Continues 5k Run
- Friends of the Northeast Mississippi Nature and Interpretive Trail
- The Maggie Project for Diabetes
- Robins Field Initiative/Elizabeth C. Ford
- Keep Tupelo Beautiful

- United Methodist Church
- First United Methodist Church of Pontotoc Endowment Fund
- Love Packs Endowment Fund
- Amory Municipal Library – James Victor Smith and Elizabeth Louis Smith Endowment Fund
- HTN Endowment Fund

- Starkville Poverty Initiative
- The Corinth-Alcorn Animal Shelter Building Fund
- Tupelo Rocks
- Pasture to Pantry
- Pontotoc High School Band Uniform Fund
- Tupelo-Lee County Hunger Coalition

## *In the News*



### **OUR OPINION: Collaborative approach strong way to fight hunger**

A broad-based coalition took another step in its efforts to fight hunger in Lee County. Read entire story [here](#).



### **Hope Continues**

Medical clinics, hospitals and other health care providers get some financial help to better serve women when it comes to breast cancer screenings and awareness. Proceeds from the first “Hope Continues 5K” are being distributed to area medical facilities and non profits. The first “Hope Continues 5K” raised \$50,000. Read more [here](#).

## *When Should a Woman Have a Will?*

### **A checklist for planning**

In today's fast-paced economic climate, it is essential for a woman to have a valid estate plan – including a will – in place and up to date. Growth in asset values, longer life expectancies, and other factors make leaving the future to chance far too great a risk.

Although trusts and other planning tools continue to gain in popularity and may achieve some of the same long-term objectives, a will - either by itself or working in a concert with other legal plans – is typically the foundation of a sound and effective long-range financial plan.

Of course, obligations to family members and others

1. When She is Single
2. When She is Married
3. When She Has Minor Children
4. When She Has Adult Children
5. When She and Her Husband Own Property Jointly
6. When Her Marital Status Changes
7. When She Wants to Help Other Family Members
8. When She Wants to Avoid Unnecessary Expenses

must come first. But you can name one or more charitable entities to receive whatever remains after your heirs have been provided for.

Making your plans and updating them as needed can bring you and your loved ones great satisfaction and peace of mind. We will be pleased to be of assistance as you and your advisors consider your long-range financial needs and estate plans.

9. When She Wants to Name Her Own Personal Representative

10. When She Has Hard-to-Value Property

11. When She Wants to Remember a Friend

12. When She Has Charitable Wishes

## OUR MISSION

CREATE Foundation is committed to improving the quality of life for the people of Northeast Mississippi through:

- Building permanent community endowment assets
- Encouraging philanthropy and managing charitable funds contributed by individuals, families, organizations and corporations
- Strengthening the regional community development capacity
- Taking a leadership role on key community issues and impacting the region through gifts and targeted grant-making

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