

Legacy MATTERS

Your Source for Planned Giving With the Northern New York Community Foundation

YEAR-END 2023

GOOD TO know

Foundation Friends

■ Donors who wish to join us and consider a gift to the Friends of the Foundation **Community Betterment Fund** may do so online at nnycf.org by **11:59 p.m. Dec. 31, 2023**. "Friends" gifts must be received or postmarked by **Sunday, Dec. 31, 2023**. A gift to this fund supports Foundation programs and helps us remain flexible and responsive to address key needs across Jefferson, Lewis, and St. Lawrence counties.

2023 year-end giving deadlines

■ Many Community Foundation fund holders recommend grants at year-end from their Donor-Advised Funds. If you would like the organization(s) you wish to support to receive grant checks before **Dec. 31**, please submit your recommendations by **5 p.m., Monday, Dec. 11**.

■ Many donors make gifts of stock or other appreciated securities to the Community Foundation at year-end. All **Stock gifts** should be received into the Foundation's brokerage account before **5 p.m., Friday, Dec. 15**.

■ General gifts to support the Community Foundation must be received or postmarked by **Sunday, Dec. 31, 2023**, to be credited this tax year or made securely online at nnycf.org by **11:59 p.m. Dec. 31**.

Establish a fund

■ Consider a **charitable fund** to help keep your passions alive, honor a friend or loved one, or to support the causes, organizations, and communities you care about — forever. **See page 3** for an overview of charitable fund options at the Foundation.

AN ENDURING GIFT FOR LEWIS COUNTY

Her legacy will give in perpetuity

A longtime librarian and teacher, **Irene Bowen** passed away in December 2021 at the age of 96, but her legacy of generosity and selfless giving will forever help five local charities whose work she valued throughout her lifetime.

As part of her legacy planning, Irene created **designated funds** to support five different organizations in the North Country. Like she did throughout her life, Irene will now provide annual support to the causes and organizations she cared most about with added oversight and stewardship through the Community Foundation.

Each year, in perpetuity, those five charities will receive an annual contribution in Irene's name, continuing the generosity she demonstrated in her lifetime.

Irene dedicated her life to education, nurturing a love of reading in many children she served through a remarkable career as a children's librarian at four different public libraries and two school systems. Born in Lowville, she graduated from Lowville Free Academy in 1943, and Smith College 1947. She later earned a graduate degree in library science from the Carnegie Institute of Technology. Irene's work with children brought her great joy and she was proud to inspire so many young readers.

She later served as a reading instructor for Jefferson-Lewis BOCES, primarily at Beaver River Central. Irene published four books of fiction for children and aided in the preparation of



"History of Lewis County, New York, from 1880 through 1965," which her father, G. Byron Bowen, edited.

She shared her gifts of time and talent as a volunteer and board member for several Lewis County civic and charitable organizations. We are grateful for the legacy the Community Foundation will steward on Irene's behalf.

What is a Designated Fund?

A **Designated Fund** is a personalized fund that **makes it easy** for you to support the organizations and causes **you care about** while ensuring **ongoing, reliable support**. You name the charity, or charities, that you want to benefit and we invest the money, **annually providing support** to these organizations. We ensure **your gift never becomes obsolete**.

A LEGACY OF MEDICAL SERVICE ENDURES

Family legacy fund helps health care students

Region will forever benefit from support for local workforce needs

As a tribute to the life and legacy of **Dr. Walter Sydney Atkinson** and his wife, **Mary**, and their devoted service to Watertown and the region, a permanent Community Foundation fund was established to assist and inspire nontraditional students pursuing health care careers.

Dr. Walter Sydney Atkinson followed his father, **Dr. Martin G. Atkinson**, and brother, **Dr. John Hedley Atkinson**, into medicine. After training in ophthalmology at McGill University, Montreal, and New York University, Dr. Walter Atkinson joined his father and brother in Watertown where, in 1911, they established the Atkinson Hospital on Sterling Street. The brothers joined the Canadian Army in 1917 and returned to family practice in Watertown after service in World War I. In 1921, Walter married Watertown native **Mary A. Gamble**.

Mary and Walter Atkinson lived in Watertown the rest of their lives and made many lasting contributions to the community.

Dr. Walter Atkinson was dedicated to quality patient care. He was also a professor and lecturer at the New York University Post-Graduate Medical School. In 1958, he was awarded an honorary Doctor of Science at St. Lawrence



A FAMILY LEGACY OF SERVICE: Dr. Walter Sydney Atkinson, wife, Mary Gamble Atkinson, and children John Gamble Atkinson, Jeanne Atkinson Remington, and Grace Atkinson Wright, pictured in 1933.

University in recognition of his contributions to medicine.

He was known worldwide as

a prominent eye surgeon. An authority on ophthalmic anesthesia, he developed the Atkinson needle

used for anesthesia. In 1972, he received the Howe Award in Greece, one of the highest medals awarded in ophthalmology.

Both served in leadership roles for various North Country organizations, especially in the health care field. For many years Walter Atkinson was director of the Watertown Foundation, now the Northern New York Community Foundation, and initiated interest-free student loans, the precursor to the Foundation's scholarship program.

The next generation, **Jeanne Atkinson Remington**, **Dr. John Gamble Atkinson** and **Grace "Gay" Atkinson Wright** all continued their parents' legacy in medicine, civic engagement, and athletics.

The **Atkinson Family Legacy Fund** will help provide encouragement, inspiration, support and great access for those seeking to serve others through careers in local health care.

It is the family's hope that those who may not have other sources of financial aid may find a pathway to pursue their dreams. Students will find opportunities for easier access to health training and the region will forever benefit by having hardworking residents supply the workforce needs for the region's hospitals and clinics.

WHAT IS LEGACY GIVING?

Plan now, give later

While established today, many planned gifts benefit the community after a donor's lifetime. **You do not need tremendous wealth** to consider a legacy gift; whatever your financial situation, there are **many flexible gift options** to fit your needs.

Legacy gifts are a **unique expression of generosity** that often highlight the causes and charities donors connect to most during their lifetimes. Planned gifts can **offer important estate, financial, and personal advantages** that allow you to give in a beneficial and most effective manner.

What's your passion?

No matter your inspiration for giving, your **legacy gift is an enduring testament** to the causes you value. By partnering with the Community Foundation, **you can make a difference that endures for generations to come.**

We can help you determine the type of gift to leave, see the impact your gift will have, work with your professional advisors, and **create a custom legacy plan** that captures your charitable intentions and preserves your personal giving story for future generations.

There's no place like home

When you give through the Community Foundation, you **ensure that your**

gift stays in Northern New York. Unlike private foundations, we aggregate many funds, magnifying their impact while providing maximum tax advantages and lessening administrative burdens.

As stewards of charitable legacies, **this work is core to our mission** and planning services are offered on a complimentary basis. No administrative fees apply until a fund is created.

Get in touch with us

Contact Foundation Executive Director **Rande Richardson**, rande@nnycf.org or Assistant Director **Max DelSignore**, max@nnycf.org, or **315-782-7110**, to learn how partnering with us can help you achieve your planned giving goals.

WORKING TOGETHER TO STRENGTHEN COMMUNITY

"I enjoy the ease of working with the Community Foundation. It supports such a wide range of our local charities and provides guidance and financial security that many charities cannot easily do on their own."

Mary Jane Watson,
South Colton



Choose a charitable fund that's right for you

Unrestricted Funds

Your gift addresses ever-changing community needs within certain parameters, including future needs that often cannot be anticipated when your gift is made.

Donor-Advised Funds

You recommend grants to qualified nonprofits and we handle all due diligence. Gifts to the fund may be made at any time, with grants made over time. Donor advised funds are great for individuals, families, and businesses and offer significant tax advantages.

Designated Funds

You can direct your gift to perpetually

benefit a specific nonprofit organization(s) or purpose. The fund provides a steady and reliable source of annual support.

Field of Interest Funds

You can target your gift to address needs in an area of community most important to you. You identify your interests when making your gift; grants are awarded to nonprofits and programs making a difference in the area you select.

Named Community Fund

You direct support to benefit citizens of a specific community or geographic region. Programs, projects, and initiatives that improve the quality of life in your chosen

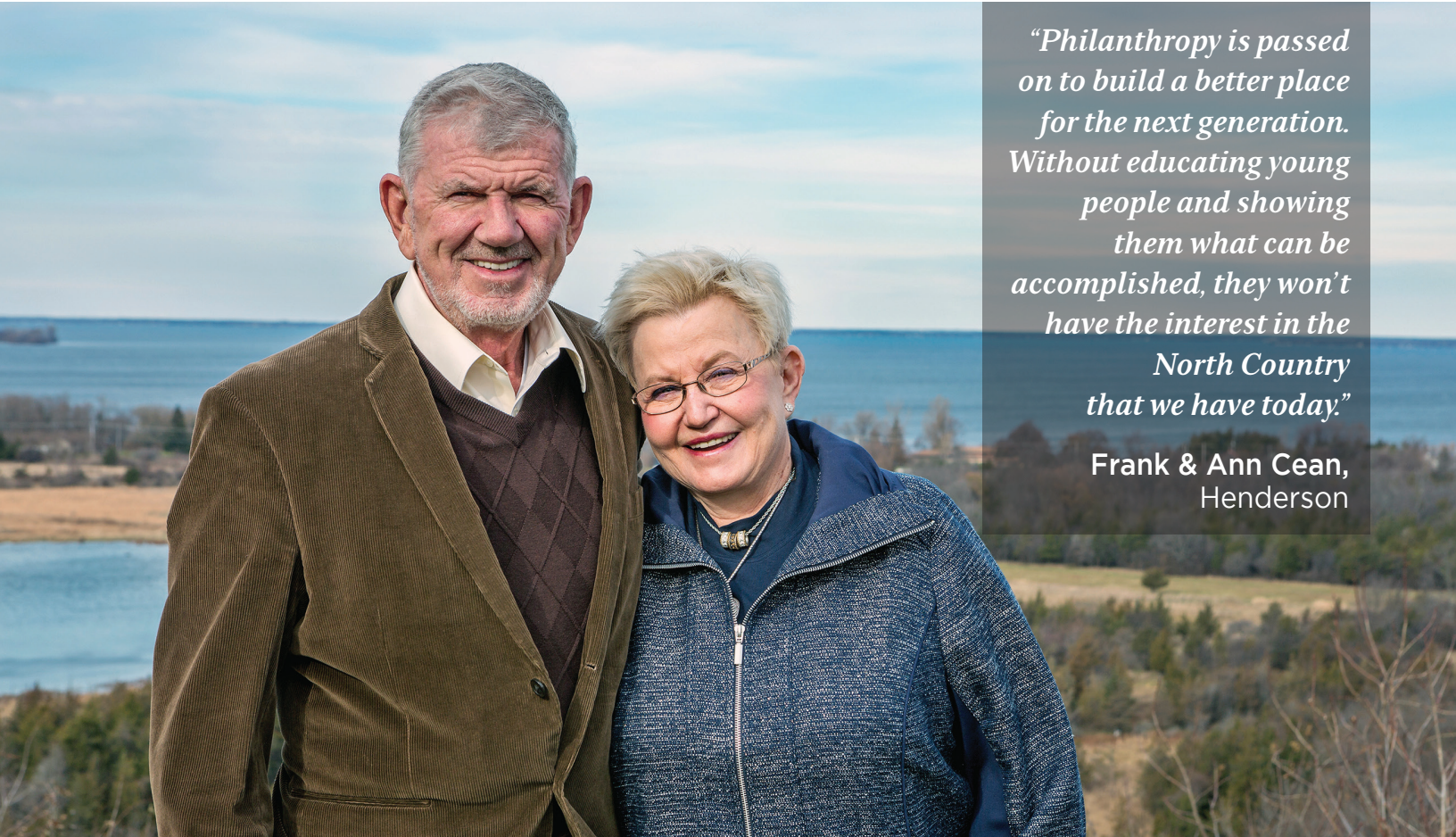
community or region are supported.

Scholarship Funds

You can use your gift to help inspire local students to achieve their educational goals. You work with Foundation staff to determine the criteria students must meet to receive the scholarship and we process the awards.

It begins with a conversation

Contact Foundation Executive Director **Rande Richardson**, rande@nnycf.org or Assistant Director **Max DelSignore**, max@nnycf.org, or **315-782-7110**, to learn how partnering with us can help you achieve your planned giving goals.



“Philanthropy is passed on to build a better place for the next generation. Without educating young people and showing them what can be accomplished, they won’t have the interest in the North Country that we have today.”

**Frank & Ann Cean,
Henderson**

FLEXIBLE GIVING TO HELP MEET YOUR GOALS

IF YOU WOULD LIKE TO:	YOU CAN:	OPTIONS AND BENEFITS:
• Contribute an annual or recurring gift to the Friends of the Community Foundation Community Betterment Fund.	• Help meet urgent community needs and match your gift with the region’s charitable needs. • Support Community Foundation programs like the Youth Philanthropy Council and Youth Giving Challenge.	• A gift to this fund helps the Community Foundation remain flexible and be responsive to address key needs across Jefferson, Lewis and St. Lawrence counties.
• Give now to the charities of your choice in an easy, organized, tax-saving way. • Make the best use of a new infusion of capital from a major life transition like an inheritance, or sale of a business. • Start a new family giving tradition.	• Start a DONOR-ADVISED FUND. You fund it, we invest it; you recommend grants, we do the paperwork and send the payments to qualified charitable organizations you choose to support.	• Involve family in your charitable decisions, or set up a fund as a gift. • Use an online portal to give to and manage your fund. • Receive an initial tax deduction. • Name the fund for yourself or in honor of a loved one, or remain anonymous.
• Champion what you care about for generations. • Establish a philanthropic legacy for your community.	• Create a PERMANENT FUND. You can create different kinds of permanent funds, including ones that benefit specific organizations, communities, places, or causes.	• Create a fund built to grow over time. • Help one or multiple issues or communities. • For a list of all fund types and their purposes, see page 3