

Leaving a Legacy Through Planned Giving

The United Way of Southwest Oklahoma depends on its volunteers and the generosity of the local community to fulfill its mission. One such giving person was longtime Lawton resident, Joye R. Lentz, who passed away at the age of 91 in November of 2014. Mrs. Lentz left a charitable bequest in her estate to the United Way of Southwest Oklahoma and they in turn transferred the bequest to their endowment fund at the Lawton Community Foundation.

Born in Chickasha, Okla., Mrs. Lentz was married to retired 1st Sgt. James Aaron Lentz for nearly 50 years before he died in 1990. She worked as a bookkeeper at the Officer's Club at Fort Sill and volunteered at the Comanche County Memorial Hospital. During her life, Mrs. Lentz was active with the Red Hat Society, the Society of Military Widows and attended New Post Chapel at Fort Sill for 40 years.



Joye R. Lentz

The sizeable gift from Mrs. Lentz's estate helped kickstart the creation of the organization's new planned giving initiative and, in her honor, it is named the "Joye Lentz Planned Giving Society."

"Our organization has discussed the development of a planned giving society for quite some time, but Mrs. Lentz's bequest led the way in making that dream a reality," said Lauren Ellis, president and chief executive officer of United Way of Southwest Oklahoma. "By establishing the 'Joye Lentz Planned Giving Society,' we were able to honor her in a way that celebrated her legacy, as well as initiate the new donor options that we are hoping to establish. I cannot think of a better way to honor a woman who was so generous to leave a legacy as she has, and in turn leave an example for others."

Ellis believes the initiative will make people in the community aware that there are other ways to contribute to the organization. She added that it's a great way to invest in your community and establish a legacy with a planned gift such as a bequest.



United Way
of Southwest Oklahoma

First established in 1947 as the Lawton Community Chest, the United Way of Southwest Oklahoma has gone through several changes over the years. A name change in 2014 also incorporated an expansion of the region which now includes nine counties in Oklahoma and two counties in Texas. The organization currently works with and funds 19 local agencies.

Including a charitable bequest in a will or trust is one of the simplest ways to make an estate gift. The Lawton Community Foundation can help you facilitate a bequest as well as help you structure a fund agreement that will enable you to change the charitable intent during your lifetime without having to change your will. We also offer a free Guide to Planning Your Will and Trust that is available at LawtonCF.org. If you are interested in leaving a bequest or would like additional information about planned giving, please contact us at 580/353-4747 or visit LawtonCF.org.

Dear Donors and Friends,

It is my sincere pleasure to share with you the 2015 Annual Report on behalf of the Trustees of the Lawton Community Foundation. In the following pages you will see highlights of activities that occurred during our Fiscal Year that ended on June 30, 2015.

As an affiliate organization of the Oklahoma City Community Foundation, we adhere to its investment policy that is designed for endowment funds to provide annual distributions for charitable purposes in perpetuity. The investment performance on our pooled investments for the fiscal year was 4.20 percent. As of June 30, 2015, the total assets of the Lawton Community Foundation were \$8,604,106.

In Fiscal Year 2015, \$67,254 in grants were awarded to 21 area charitable organizations through our Community Grants and Matching Grants programs. The Lawton Community Foundation Scholars program provided \$25,500 in scholarships to 14 Lawton area high school seniors.

Since its establishment in 1999, the Lawton Community Foundation has reinvested nearly \$3.5 million back into the community through scholarships, grants and annual distributions to area charitable organizations.

Community programs are made possible thanks to the support of our donors. We hope you will join us in continuing to support the charitable interests of our community now and in the future. Please feel free to contact us at 580/353-4747 or visit LawtonCF.org.



Scott Hatch
President,
Board of Trustees

Lawton Community Foundation Donors

The donors listed below have made cumulative gifts of \$500 or more to permanent endowments at the Lawton Community Foundation. We currently administer seven Advised Funds established by donors to accomplish their charitable goals. If you are interested in making a gift or establishing an Advised Fund at the Lawton Community Foundation, please contact us at 580/353-4747 or visit LawtonCF.org.

Owen & Jane Ard
Stephen & Nancy Arntz
Bank of the Wichitas
Bar-S-Foods
Maj. Gen. (Ret.) Lee & Theresa Baxter
Lt. Col. (Ret.) L. A. Beckman III
Bivens Memorial
Dianne & Chad Bledsoe
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Dennis & Sandra K. Ward
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Lanny & Florence Wilson
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Advised Funds

Virginia Brewczynski Legacy Fund
Terry K. Bell Charitable Trust Fund
Cowboy Fund
Cleo Craig Memorial Cancer and Research Foundation Fund
First United Methodist Church Foundation Gift Fund
Katherine D. Lacy Fund
Gene & Carolyn Anne Love Gift Fund

Lawton Organization Helping Stop Crime in Southwest Oklahoma

Crime Stoppers/Drug Busters of Southwest Oklahoma offers citizens an anonymous way to provide information to authorities after witnessing a crime or to report details that might be helpful in solving a crime. Since its inception in 1981, the organization has received 13,415 tips resulting in 2,749 arrests and 566 fugitives caught. During this time period, \$433,875 has been paid out in rewards to citizens.

To help support annual scholarships for police officer education, Crime Stoppers/Drug Busters of Southwest Oklahoma established an endowment at the Lawton Community Foundation with a gift of \$100,000 in 2014. The organization realized the importance of making sure these scholarships continue to be available in perpetuity. Through this endowment, charitable contributions can easily be accepted to further the mission of the organization.

The organization holds several fundraising events throughout the year including an annual membership drive, a two-mile "Moonlight Walk Against Drugs" and semi-annual bicycle auctions of recovered bicycles that haven't been claimed by their owners. All of the funds that are raised help support operating expenses and also provide rewards to citizens assisting Crime Stoppers/Drug Busters of Southwest Oklahoma.



Each year Crime Stoppers/Drug Busters of Southwest Oklahoma holds auctions of recovered bicycles to help support operating expenses and rewards.



The 2015 Lawton Community Foundation scholarship recipients, front row, left to right: Megan Craig, Mariah Butcher, Sienna Salas, Sabrina Carlson, Marquice Paras, Valeria Barrientos and Lauren Landoll. Back row, left to right: Chavicia Flanders, Morgan Sharkey, Emaini Payton, Leighton Reed, Kennedy Ballard and Leann Bay. Not pictured: Marisa Moore.

14 Lawton Area High School Seniors Awarded Scholarships

In April, the Lawton Community Foundation awarded 14 Lawton area high school seniors with a total of \$25,500 in scholarships at the foundation’s annual scholarship breakfast held at Cameron University. The recipients represented Lawton, Duncan, Frederick, Cache, Elgin and Altus school districts.

Lawton Community Foundation Scholar awards were presented to 11 students in the amount of \$1,500. The Lawton Noon Lions Club presented one award of \$1,500 per year for four years. Recipients of these awards are selected by the Lawton Community Foundation’s scholarship committee with assistance from high school guidance counselors and a committee at each high school.

2015 Lawton Community Foundation Scholars:

Valeria Barrientos – Eisenhower High School
 Leann Bay – Elgin High School
 Sabrina Carlson – Lawton High School
 Chavicia Flanders – Lawton High School
 Lauren Landoll – MacArthur High School
 Marisa Moore – Duncan High School
 Marquice Paras – Eisenhower High School
 Emaini Payton – Altus High School
 Leighton Reed – MacArthur High School
 Sienna Salas – Frederick High School
 Morgan Sharkey – Cache High School

2015 Frank Curran Memorial/Lawton Noon Lions Club Scholarship recipient:

Megan Craig – MacArthur High School

Benny McReynolds Memorial Scholarship

The Benny McReynolds Memorial Scholarship is a one-time \$2,000 award established at the Oklahoma City Community Foundation in 2010 and benefits graduating seniors from Frederick High School. Mr. McReynolds, a 1975 graduate of Frederick High School, left a bequest in his estate to establish the scholarship fund.

2015 Recipient:

Kennedy Ballard – Frederick High School

Lamont N. Wilson ROTC Scholarship

The Lamont N. Wilson ROTC Scholarship is a one-time \$1,000 award established in 2010 by an anonymous donor and Lamont’s parents to honor 2003 Eisenhower High School graduate Lamont N. Wilson. Lamont enlisted in the U.S. Marines following graduation and was killed in combat while serving in Iraq in 2004. The scholarship is awarded annually to an ROTC student graduating from Lamont’s alma mater.

2015 Recipient:

Mariah Butcher – Eisenhower High School

Charitable Organization Endowments

The Lawton Community Foundation administers permanent funds for 34 nonprofit organizations through the Charitable Organization Endowment Program. The endowments provide a reliable source of annual income for program participants and also offer a convenient way for donors to make contributions. As of June 30, 2015, the market value for these endowment funds was more than \$2.9 million and the annual distributions to the organizations exceeded \$115,000.

Fund	Fund Value at June 30, 2015	FY2015 Distribution
Arts for All	\$ 50,932	\$ 2,498
Association of the U.S. Army Fires Chapter	29,118	1,432
Comanche County Memorial Hospital Foundation	98,751	1,025
Crime Stoppers/Drug Busters of Southwest Oklahoma	99,625	4,263
J. Roy Dunning Children's Shelter	23,232	1,124
Field Artillery OCS Alumni Chapter	125,139	5,200
First United Methodist Church Foundation of Lawton	102,805	5,939
Fort Sill Armed Services YMCA Gene Love Endowment	317,792	14,418
Frederick School Enrichment Foundation	22,794	1,132
Friends of Fort Sill	36,696	1,324
Giddy Up 'N Go	64,845	3,182
Great Plains AMBUCS-Kid's Zone	20,715	1,031
Great Plains Technology Center Foundation	22,082	1,098
Greater Lawton Rotary Club	73,423	
Robert E. Greiner School for the Handicapped of Comanche County	34,490	1,688
Hackberry Flat Foundation	56,296	2,763
Holiday in the Park	23,480	1,151
Lawton AMBUCS Lou Brox Endowment	93,380	3,788
Lawton Community Theatre	31,030	1,532
Lawton Family YMCA	20,451	993
Lawton Food Bank	103,571	3,925
Lawton Friends of the Library	26,655	1,330
Lawton Philharmonic Orchestra	36,749	1,805
Lawton Public School Foundation	493,596	22,695
Museum of the Great Plains	32,787	1,586
On the Chisholm Trail Association Heritage Center	52,925	2,436
Bernice Ford Price Library Endowment	34,297	1,323
Kathy Bea Holsinger Reese Memorial for the benefit of St. Paul's United Methodist Church	57,689	1,987
Roadback Inc.	24,286	1,154
Southwest Oklahoma Genealogical Society	20,722	1,024
St. John Lutheran Church Foundation	52,492	1,717
Tipton Children's Home*	19,804	
United States Field Artillery Association Foundation	350,672	16,393
United Way of Southwest Oklahoma	324,858	2,659
Total	\$2,978,179	\$ 115,615

*New fund established in Fiscal Year 2015.

Scholarship and Award Endowments

The Lawton Community Foundation administers 11 scholarship endowment funds that provide support for area scholarship programs. Scholarship and award funds are a simple and effective way for donors to make a difference. Below is a list of the scholarship and award funds along with the fund values as of June 30, 2015.

Fund	Fund Value At June 30, 2015
Cache School Scholarship	\$ 164,366
Frank Curran Memorial/Lawton Noon Lions Club Scholarship	145,273
Great Plains - Jim Nisbett Scholarship	57,751
General Donald R. Keith Memorial Scholarship	26,836
General Jack N. Merritt Scholarship	23,700
Oklahoma Arts Institute Scholarship	27,241
General J.H. Binford Peay III Scholarship	23,575
Dennis J. Reimer Scholarship	29,601
U.S. Field Artillery Eagle Scholarship	20,849
General Carl E. Vuono Scholarship	23,575
Lamont N. Wilson ROTC Scholarship	26,563
Total	\$ 569,330

Community Grant Brings Anti-Bullying Workshop to Lawton Schools

Bullying is happening at alarming rates in our schools. With the help of a Community Grant from the Lawton Community Foundation and other funding sources, the Girl Scouts – Western Oklahoma are working to reduce teen bullying and promote positive conflict resolution in the Lawton Public School District.

From March to May of 2015, the Girl Scouts – Western Oklahoma presented a one-day Be A Friend First (BFF) workshop to 352 girls in sixth grade at MacArthur, Tomlinson and Central middle schools in Lawton. The BFF program is a research-based, nationally tested girls’ bullying prevention curriculum that promotes positive behavior and safe environments for girls.

With help from Girl Scout staff members, teachers and other volunteers, students discussed peer pressure, stereotyping, gossiping and cliques through role playing. There were also creative writing and discussion exercises and games. Participants were asked at the beginning of the day to define bullying and at the end of the day they came up with ideas to combat bullying. Each student received a Girl Scout aMaze! curriculum book and a BFF reminder bracelet.

The Girl Scouts – Western Oklahoma first brought the BFF program to the school district in 2013. The organization has been asked back each year since to provide the program to more girls in the sixth grade. The organization currently serves 39 counties in western Oklahoma.



Sixth graders participate in an anti-bullying exercise.

Community Grants

The Community Grants program awards grants of up to \$5,000 to support projects that will improve the quality of life and provide opportunities for Lawton area citizens. In Fiscal Year 2015, \$33,177 in grants were awarded to eight charitable organizations. For more information on our Community Grants program visit LawtonCF.org.

CASA of Southwest Oklahoma - \$5,000 to provide training for staff members and advocates.

Girl Scouts - Western Oklahoma - \$5,000 to support positive behavior and safe environments for middle school girls in the Lawton Public School District by providing a research-based, nationally tested girls’ bullying prevention curriculum.

J. Roy Dunning Children’s Shelter of Lawton - \$2,600 to purchase four new computers.

Lawton Family YMCA - \$5,000 for updating and improving the youth and teen area of the YMCA.

Lawton Public School Foundation/Eisenhower High School - \$2,400 to support the Ignition Mentoring program, a freshmen transition program that enhances the chances of success and improves the promotion rate of freshmen.

Operation Homefront Oklahoma - \$5,000 to support the Freedom Bunker program that provides help for military families in emergency situations.

Roadback - \$3,177 for the purchase of equipment and materials for the adolescent group room and physician exam room in the Community Recovery Center.

Teen Court - \$5,000 to provide educational classes for 125 youth to resolve conflict issues that result in violence in Comanche County.

Matching Grants

The matching grants program awarded up to \$3,200 in matching dollars for up to \$5,000 in gifts made to existing endowments at the Lawton Community Foundation. It was required that \$2,500 of the \$5,000 come from individuals. In Fiscal Year 2015, matching grants totaling \$34,077 were awarded to 13 charitable organization endowments.

Organization

Armed Services YMCA Lawton Fort Sill	\$	1,632
Cache School Education Foundation		3,200
Comanche County Memorial Hospital Foundation		1,600
Field Artillery OCS Alumni Chapter		3,200
Friends of Ft. Sill		2,045
Greater Lawton Rotary Club		3,200
Lawton Chapter of AMBUCS		3,200
Lawton Food Bank		3,200
Lawton Noon Lions Club		3,200
Bernice Ford Price Library Endowment		1,600
St. John Lutheran Church		3,200
St. Paul’s United Methodist Church-		
Kathy Bea Holsinger Reese Memorial Fund		3,200
United States Field Artillery Association Foundation		1,600
Total	\$	34,077

Lawton Community Foundation: Charitable Giving Made Easy

We Keep It Simple – We handle all administration and legal requirements associated with endowments and Advised Funds, allowing you to focus on your charitable giving.

Financial Benefits – Because we are an affiliate organization of the Oklahoma City Community Foundation, a 501(c)(3) public charity, you receive the maximum tax benefits available for your charitable gifts.

Flexibility – We accept a variety of gifts and can customize a giving plan that fits your charitable goals.

Cost Effective – The Oklahoma City Community Foundation provides our administrative and investment services at a much lower cost compared to private foundations or similar entities.

How and What to Give

Gifts We Accept:

We can accept a variety of gifts including cash, credit cards, real estate, retirement plan assets, business-related assets, oil and gas interests, royalty interests and appreciated stocks, bonds or mutual funds.

Planned Gifts:

We can work with you to determine the planned giving option that will provide the maximum tax advantages, has the greatest long-term charitable benefit and best meets your needs. Below are several planned giving options:

Bequest – A bequest is one of the simplest ways to make a planned gift. We can help facilitate your bequest to designate a percentage, the residual or your entire estate to benefit an existing fund or to establish a new fund. This option may provide you and your family with substantial reductions in federal estate taxes.

Charitable Gift Annuity (CGA) – We can help you establish a CGA with a gift of cash or other assets, guaranteeing a set income for life. At the end of the annuity, the remaining assets will go to the charitable fund(s) of your choice.

Charitable Remainder Trust (CRT) – A CRT might be an appealing giving option for individuals looking to reduce the size of their estate now, while designating a charitable gift in the future. By establishing a CRT with real estate or other assets, you can receive annual income for life or a term of years and upon the trust's termination, the remaining assets will benefit the charitable fund(s) of your choice.

Charitable Lead Trust (CLT) – Allows the transfer of assets to the Lawton Community Foundation, with a percentage of the assets' value directed to the charitable fund of your choice. At the end of the trust term, the remaining assets are passed on to designated heirs.

Life Insurance – Life insurance policies can be used to fund a charitable giving plan without significant outlays of cash. If the policy is gifted, you receive a tax deduction for the current cash value and future premiums could be funded with additional tax deductible contributions.

Retirement Plan Assets – Donors can use retirement plan assets to establish an Advised Fund, reducing a potential tax burden on heirs. Your heirs can serve as advisors to the fund, ensuring that your charitable interests are continued into the future.

Types of Funds You Can Establish

Advised Funds – Establishing an Advised Fund is a simple and flexible way to accomplish your charitable objectives. An Advised Fund can be established with a gift of cash or other assets and allows you to recommend grants from the fund to charities of your choice. We handle all administrative and reporting requirements for the fund and maintain a record of your gift and grant activity. Below are the three types of Advised Funds we offer:

Legacy Fund – For families or individuals considering establishing a private foundation, a Legacy Fund can provide a simpler, more practical alternative. With low annual fees, a Legacy Fund is a permanent endowment that requires a minimum balance of \$20,000 and benefits from the performance of our pooled investments. The fund's annual spendable amount allows for grants to be recommended at any time to any charitable organization and granting ability can be carried on by family members.

Gift Fund – For individuals who want the option to distribute the entire fund balance to charity, a Gift Fund offers that flexibility plus the benefits of our investment performance. A Gift Fund can be established with a minimum gift of \$20,000 and is invested in our general investment pool or in a money market option. With low annual fees, our Gift Fund is often a less expensive and more effective alternative to commercial gift funds. The fund balance is completely spendable, allowing for grants to be recommended at any time to any charitable organization.

Express Fund – An Express Fund is ideal for year-end gifts of appreciated securities, providing a current charitable income tax deduction for the donated assets and the option to recommend grants to charitable organizations in the future. An Express Fund can be established with a minimum gift of \$1,000 and charges a low administrative fee of up to 1 percent on contributions at the time of the gift. While Express Funds do not receive investment earnings, the completely spendable fund balance allows for grants to be recommended at any time to any charitable organization.

Charitable Organization Endowment Funds – The Lawton Community Foundation currently administers endowment funds for 34 charitable organizations. Through the program, the organizations receive an annual distribution from their endowment in perpetuity, providing a reliable source of income as well as a convenient way for donors to make contributions.

Scholarship & Award Funds – These funds are permanent endowments established by individuals, corporations, alumni groups or civic organizations to provide support for individuals to attain higher education or post-high school training.

For more information on how the Lawton Community Foundation can work with you to accomplish your charitable goals, please call 580/353-4747 or visit LawtonCF.org.

How are the Endowment Funds Invested?

As an affiliate organization, the Lawton Community Foundation adheres to the Oklahoma City Community Foundation's investment and distribution policies. The distribution policy is designed for an endowment fund to provide annual distributions for charitable purposes in perpetuity while the investment policy maintains a disciplined approach to long-term investment strategy that emphasizes diversification of assets and focuses on quality investments.

The four major objectives of the investment policy are:

- Capital preservation.
- Protection from inflation.
- Continuing source of annual distribution for charitable purposes.
- Investment return in the top third of professionally-managed funds.

All endowments benefit from the investment policy as they are pooled with other Oklahoma City Community Foundation endowment funds and invested by style-specific managers selected by the Investment Committee. The Investment Committee is comprised of five Oklahoma City Community Foundation Trustees or former Trustees and four non-Trustee Oklahoma City community leaders with strong investment expertise. The committee and the investment counsel determine asset allocation between equity and fixed income sectors and monitors the performance of the managers.

Lawton Community Foundation Distribution Policy

The distribution policy provides a structured method of making annual distributions from an endowment, creating a predictable distribution amount and maximizing total investment returns. Annual cash distributions from the majority of permanent endowment funds are based on a spending policy that distributes 5 percent of the fund's average market value for the previous 12 quarters as of March 31. The remaining investment return remains in the fund to increase its value and to protect future distributions from inflation.

Oklahoma City Community Foundation* Pooled Investments Performance as of June 30, 2015

	Year Ended June 30, 2015	Three Years Ended June 30, 2015	Five Years Ended June 30, 2015	Ten Years Ended June 30, 2015
EQUITIES				
Oklahoma City Community Foundation	5.74%	15.64%	15.48%	7.43%
S&P 500	7.42%	17.31%	17.34%	7.89%
Russell 3000	7.29%	17.73%	17.54%	8.15%
MSCI ACWI exUS	-4.85%	9.92%	8.23%	6.01%
FIXED INCOME				
Oklahoma City Community Foundation	1.79%	1.76%	2.97%	4.26%
Barclays Capital Govt./Credit Intermediate A+	1.77%	1.31%	2.47%	
TOTAL RETURN				
Oklahoma City Community Foundation	4.20%	9.91%	10.45%	6.43%
50% Russell3000/15%MSCI ACWI/35% Barclays Capital G/C Int (Note A)	3.49%	10.74%	10.96%	6.66%
65% S&P500/35% Barclays Capital G/C Int (Note B)	5.49%	11.67%	12.23%	6.80%

* The Lawton Community Foundation is an affiliate organization of the Oklahoma City Community Foundation and its assets are pooled with other endowment funds administered by the Oklahoma City Community Foundation for investment purposes.

Note A: Equity performance is compared to the Russell 3000 stock index and the MSCI ACWI exUS International equity index; fixed income performance is compared to the Barclays Capital Government/Credit Intermediate bond index (Barclays Capital G/C Int) and total return is compared to a composite of these three indices.

Note B: Equity performance is compared to the Standard and Poor's 500 stock index (S&P500); fixed income performance is compared to Barclays Capital Government/Credit Intermediate bond index (Barclays Capital G/C Int) and total return is compared to a composite of these two indices.

The Lawton

Community Foundation

The Lawton Community Foundation
is an affiliate of the Oklahoma City
Community Foundation

P.O. Box 6033 • Lawton, OK 73506

New for 2015!

Features to explore at the new LawtonCF.org:

Secure Online Giving Services

Donors can make charitable gifts to endowment funds using credit cards with ease and the peace of mind that their transactions are handled by a secure service.

Responsive Design

The new website has a responsive design so regardless of the device you use to visit (PC, tablet or smartphone), you will have the most optimal viewing experience.

Charitable Organization Directory

Visitors can easily review the 34 Lawton area nonprofits that have established permanent endowment funds with the Lawton Community Foundation. Each directory page includes a brief overview of the nonprofit's mission, contact information and a link to the organization's website. Each page also includes a link to the secure online giving service so donors can make direct gifts to the charity's endowment fund.

Contact Us

Each page on the website lists who to contact for additional information and an online inquiry form is now available.

Visit us today at the new LawtonCF.org!



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