



IN|VISION



THE COMMUNITY
WE'VE BECOME
STARTED TAKING SHAPE
A CENTURY AGO.
THE COMMUNITY WE'LL BE
IN 100 YEARS
STARTS WITH YOU.



IN|VISION



MONUMENT CIRCLE CIRCA 1965
PHOTO COURTESY OF THE BASS PHOTO CO COLLECTION,
INDIANA HISTORICAL SOCIETY

IN THE BEGINNING,
**THERE WERE
VISIONARIES.**

CHARLES WARREN FAIRBANKS
FORMER U.S. VICE PRESIDENT
PHOTO COURTESY OF THE INDIANA
HISTORICAL SOCIETY

JOSIAH K. LILLY
ELI LILLY AND COMPANY PRESIDENT
PHOTO COURTESY OF THE BASS PHOTO CO COLLECTION,
INDIANA HISTORICAL SOCIETY

Former U.S. vice president Charles Warren Fairbanks. Eli Lilly and Company president Josiah K. Lilly. Attorney and civic leader Henry H. Hornbrook.

In 1916, these men and others formed the first Board of Trustees of the Indianapolis Foundation—one of the first community foundations in America. Over the next century, The Indianapolis Foundation helped launch or support a great number of the city's most important nonprofits. Today, vital community organizations like Second Helpings, The Mind Trust, the Indianapolis Symphony Orchestra, and United Way of Central Indiana exist thanks in part to grants or support from The Indianapolis Foundation.

Later came Legacy Fund of Hamilton County, founded 25 years ago. In a short time, it has helped fund several significant Hamilton County projects, including Coxhall Gardens, Trinity Free Clinic, Cool Creek, and vital youth assistance programs. Without its presence, the communities of Noblesville, Carmel, Westfield, and others would look much different.

In 1997, The Indianapolis Foundation and Legacy Fund united under the Central Indiana Community Foundation, creating Indiana's largest and most influential community foundation. Today, CICF stands tall as the one organization that helps passionate philanthropists make a powerful impact on Marion and Hamilton Counties, all while ensuring that every donor's intentions are honored today *and* tomorrow.

CICF: THE VEHICLE FOR YOUR VISION.

If you have a vision that stretches not just years but generations into the future, CICF can make it a reality. No other organization is as committed to philanthropic-powered change in Central Indiana. Whether you're in Indianapolis or Hamilton County, our technical knowledge, access to civic and community leaders, and our affiliation with a broad network of like-minded funders makes us the clear choice for people who are serious about changing the world.

*It starts with
a single gift.
After that,
the possibilities
are boundless.*



A
MOMENT
TO REFLECT—AND
TO ACT.

In 2016, The Indianapolis Foundation celebrates its 100th anniversary. Legacy Fund of Hamilton County celebrates its 25th anniversary.

As we approach these milestones, we're not only reflecting on the past. We're also looking boldly to the future. And we're calling on people who are passionate about Central Indiana to do the same. We've made great strides in the past century. Businesspeople, civic leaders, philanthropists, and others have worked hard to create a community that is vibrant, diverse, and growing.

Your philanthropic passion yields tangible results.

Passion drives philanthropy—and philanthropy drives progress. CICF offers you a unique opportunity to turn your passion into something powerful. Whether you want to improve education, fight hunger, combat poverty, or beautify the community, we can help you create real, lasting change.

You can choose to support individual organizations, focus on a narrow field of interest, or cast a wider net to serve a larger range of need—or a future need that has yet to be defined. The degree to which you're personally involved is entirely up to you.

Planned giving is the best way to ensure that your philanthropic passion yields tangible results. CICF and its affiliates can make that passion come alive today. The most important thing is that you act. The world won't wait to be changed. CICF is the vehicle—you're the driver.





**JESSE AND
BEULAH COX**

Jesse and Beulah Cox wanted to do something to preserve a piece of the rapidly disappearing countryside of their adopted hometown, Carmel, Indiana. So they donated 125 acres and three homes on their property to the Hamilton County Parks Department in 1999 to create, in Jesse's words, "An oasis in a sea of homes." The result was Coxhall Park and Gardens, a project that Jesse helped develop through a CICF field of interest fund to which he contributed \$4.29 million over four years.

“Jesse and Beulah Cox’s gift was a significant benefit for Carmel. It’s tangible, real, and an irreplaceable part of our landscape. Coxhall Park and Gardens is not only a testament to their vision and generosity, but also a vital part of our city.”

–CARMEL MAYOR JIM BRAINARD

Though Beulah Cox had passed away, Jesse was on hand in 2006 when Legacy Fund, a CICF affiliate, helped the Friends of Hamilton County Parks raise money to establish the not-for-profit Coxhall Garden Society, which helps tend the rose and tulip gardens, as well as other specialty gardens throughout the park. Legacy Fund is also home to an endowment fund that pays for the ongoing maintenance of the park's fountains, playgrounds, storefront village, and other child-friendly attractions.

Through their love of the land they had owned and called home since 1962, the Coxes made sure Hamilton County residents would have a sanctuary from highways and high-pressure jobs for generations to come. And through their partnership with CICF and Legacy Fund, they created a plan to leave a legacy that honored their specific intentions in perpetuity.

GOAL:

To donate farmland and other property, creating a unique public green space and sanctuary for the community.

FUND TYPES:

Field of Interest Fund
Charitable Organization
Endowment

ASSET TYPES:

Real Estate
Cash

RESULT:

Coxhall Gardens, now owned and operated by Hamilton County Parks and Recreation Department and supported and maintained by the not-for-profit Coxhall Garden Society.





**BUILDING
A BETTER
COMMUNITY**
THROUGH VISIONARY
LEADERSHIP.

CICF is guiding the way toward a better Central Indiana. In the simplest terms, we do three things:

1. We award grants to not-for-profits doing good work in our community.
2. We help donors change the world through highly effective charitable giving.
3. We provide leadership, finding new ways to make Central Indiana a better place.

Through study and research, we are confident these three initiatives will help our region:

- Attract the best and the brightest to work, live, and raise a family in Central Indiana.
- Develop our citizenry—especially those less fortunate but deserving and driven—into contributing community members.
- Develop and retain a creative, community-minded, and highly educated workforce.

Our vision is to make Central Indiana a healthier, stronger, and more vital community—to elevate both our citizenry and our reputation as a region. In due time, we believe Central Indiana can become one of the top ten regions of choice in the United States.

And you can help make it happen.





**POWERFUL.
PURPOSEFUL.
PERMANENT.**

A desire for impact is at the heart of every philanthropic vision.

CICF maximizes the impact of our clients' charitable efforts by keeping these core principles paramount:

POWERFUL STRATEGY. A philanthropist's support is most powerful when it is informed by smart, strategic choices. The quality of one's giving is as important as the quantity. Perhaps more so.

PERPETUITY OF PURPOSE. All giving has a purpose, and it's critical that your purpose is preserved throughout successive generations if you so desire. Many donors want to give heirs latitude in decisions, but some would be disappointed to learn how their descendants redirected their assets.

PERMANENT RESULTS. Every philanthropist wants his or her efforts to persist over time. CICF helps you create a plan that's realizable, tangible, and bears lasting results—all while reflecting your personal values.

You're in this for long-term community impact. We understand. We've been at this for 100 years, after all. We have the technical knowledge and the nuanced understanding it will take to realize your vision—and to forge your legacy.





**EFROYMSON
FAMILY FUND**

For three generations—from patriarch Gustave to his son Robert and grandson Dan—the Efroymsen family has played crucial roles in the development of Indianapolis' business and charitable sectors. That tradition continues today with Dan's widow Lori Efroymsen-Aguilera, a former CICF board member who, along with son Jeremy and daughter Elissa, are the advisors of the Efroymsen Family Fund.

Dan and Lori established the Efroymsen Family Fund at CICF in 1998. At the time, it was the largest donor-advised fund ever created in the United States. In 2016, the Efroymsen family will give their 100 millionth dollar in grants to local, regional, national, and international organizations.

“The name ‘Efroymsen’ is synonymous with ‘progress’ in Indianapolis. From Gustave’s courageous fight against bigotry to his family’s strong support of the arts, they’ve been pushing our city forward for decades.”

—INDIANAPOLIS MAYOR GREG BALLARD

The Efroymsen Family supports a broad range of issues including arts and culture, support for individuals in need, protection of the environment and land conservation, historic preservation, and the well being of the Jewish people. They give to programs and projects that are close to their hearts and that also have the potential to create transformational change.

CICF helps the Efroymsen Family Fund in numerous ways, including: assistance with organization research, review of funding inquiries, strategic recommendations, and identification of funding opportunities. The Efroymsens strive to be creative in their funding and to lessen the administrative burden that can accompany it. They work in partnership with organizations to understand their greatest needs and priorities, and they encourage new and innovative approaches to programming and solving social problems. While the family supports established organizations, they are also very entrepreneurial. Often, they are the first investors in start-up organizations or new projects and programs.

For nearly a century, the Efroymsens have been charitable pioneers and investors. CICF is honored to help them carry on their extraordinary legacy.

GOAL:

Multi-generational transformative community investment

FUND TYPE:

Donor-Advised Fund

ASSET TYPE:

Cash
Publicly Traded Securities

RESULT:

A truly powerful long-term giving model. While the amount of the original gift—and more—has been granted to various programs and projects, the current fund balance is 150% of that number.





**TEN
REASONS**
CENTRAL INDIANA
VISIONARIES
PARTNER
WITH CICF.

WE'RE COMMITTED TO CENTRAL INDIANA.

This is home, where your family and passions live. It has provided you with abundant joy and has been instrumental to your success. The same is true for us. We've been here for 100 years. We are deeply rooted, and deeply invested, in this community. We also have a proven track record of visionary and entrepreneurial community leadership.

WE MAKE YOUR GOALS PARAMOUNT.

You have specific philanthropic intentions that are close to your heart. We're uniquely equipped to help you see those intentions through exactly as you wish, both now and into the future.

FAMILY IS A CORE FOCUS. We are sensitive to issues that arise when families give together. We provide philanthropic education to all ages, and can facilitate family conversations to ensure a solid philanthropic plan centered on your family's values and beliefs for current and future generations.

YOUR ADVISORS ARE OUR ALLIES.

We are eager to work with your investment and legal advisors in a true partnership as we create a comprehensive plan to fulfill your charitable goals along with your other financial and estate plans.

TAX ADVANTAGES. As a public charity, CICF can offer the maximum tax advantages for most gifts under federal law. Many times your assets are the most advantageous to give.

A REPUTATION FOR RESULTS.

Central Indiana's top philanthropists trust CICF because we are known for our commitment to reliable and confidential service and support.

PHILANTHROPIC EXPERTISE. When you invest with CICF, you gain immediate access to best practices and an arsenal of philanthropic experts ready to assist with everything from legal compliance to legacy planning and strategic charitable giving.

PROFESSIONAL INVESTMENT MANAGEMENT. Your philanthropic assets will be managed with due diligence by our professional investment management team—or, if you choose, by your own manager—at all times.

LEVERAGING OF ASSETS. By giving you the choice to combine your investments with those of other like-minded philanthropists, CICF can dramatically increase the impact of your charitable efforts.

ENSURING YOUR LEGACY. As a CICF client, you can rest assured that any future disbursement of your assets will follow your wishes, and that your legacy will remain fully intact.





**YOUR
ADVISORS.
OUR PARTNERS.**

Our goal is to make your philanthropic wishes a reality as quickly and effectively as possible. That means having a collaborative, communicative relationship with your trusted advisors.

LEGAL ADVISORS

As your advocates, your legal advisors will welcome the participation of CICF in the fulfillment of your philanthropic goals. We have a long history of working closely with attorneys in Central Indiana. Our skills complement theirs, and we can work seamlessly together to meet your objectives.

INVESTMENT ADVISORS

Likewise, your investment advisors will view a partnership with CICF as a smart way to ensure the permanence of your assets through due diligence. You can enlist CICF to perform this function for you, or you can choose to invite your financial advisor to manage your philanthropic assets with CICF.

TAX ADVISORS & FINANCIAL PLANNERS

Your tax advisors—certified public accountants and financial planners—will appreciate CICF's attention to detail when it comes to ensuring that you always receive the smartest charitable advice and the best tax benefits available under the law.

MAKE THE MOST OF ALL OF YOUR ASSETS.

CICF can help you identify the most advantageous assets to give. This includes assets beyond cash or ordinary securities, which we can help convert into a permanent fund or arrange to designate for philanthropic purposes in your estate plan. Potential assets include:

- Closely held securities
- Retirement assets like 401(k)s, IRAs, etc.
- Insurance policies
- Partnerships and LLC interests
- Trusts
- Real estate
- Intellectual property such as patents and royalties
- Art collections





**MARJORIE
MEYER**

Time is money. A stitch in time. Time flies.

There are plenty of clichés that involve time. But in the case of the Meyer Family Endowment Fund at CICF, time is not a cliché but a long-lasting and transformative family legacy and gift.

“It’s amazing what Goodwill has been able to do thanks to Marjorie Meyer, and that a family heirloom is living on and doing good. The entire Meyer family has supported and provided leadership to so many children and people who have needed an opportunity to better their lives. The Meyers’ gifts are priceless.”

—JIM MCCLELLAND, FORMER CEO OF GOODWILL INDUSTRIES

In 2000, Marjorie Meyer gifted a very special heirloom to CICF to establish a charitable foundation for her family. Marjorie’s father, Ralph Teetor, who was blind, depended on “repeater watches” to chime out the time. After his death, Marjorie inherited two of his rare Patek Philippe repeater watches from the early 20th century and allowed CICF to sell them at auction and use the proceeds to establish a donor-advised fund for the family. The tax benefits of making a gift of tangible property were advantageous to Marjorie, but more important, the gift has provided years of family grantmaking and community support.

Marjorie and her adult children regularly awarded grants to educational and faith-based programs. After a few years, the family members decided to split the original fund into four individual donor-advised funds for each of the children and their maturing families to have and use as they see fit. CICF continues to help each fund’s advisors implement their strategies for giving to the groups and programs that are most important to them, and begin to engage a fourth generation—Mr. Teetor’s great-grandchildren—in the time-honored tradition of the family’s legacy of giving.

GOAL:

Multi-generational giving

FUND TYPE:

Donor-Advised Fund


ASSET TYPE:

Tangible Property

RESULT:

Family-directed giving that is now entering its fourth generation





You desire a legacy. CICF can help you get there, whether you want to start today or plan for tomorrow.

**ONE VISION.
ONE LEGACY.
TWO PATHS.**

START WITH EXISTING CHARITABLE ASSETS TODAY.

Existing private foundations or other instruments like trusts or commercial gift funds may be used to create current endowments. Enjoy several advantages by converting all or a portion of these existing assets into a permanent vehicle through CICF while you're alive.

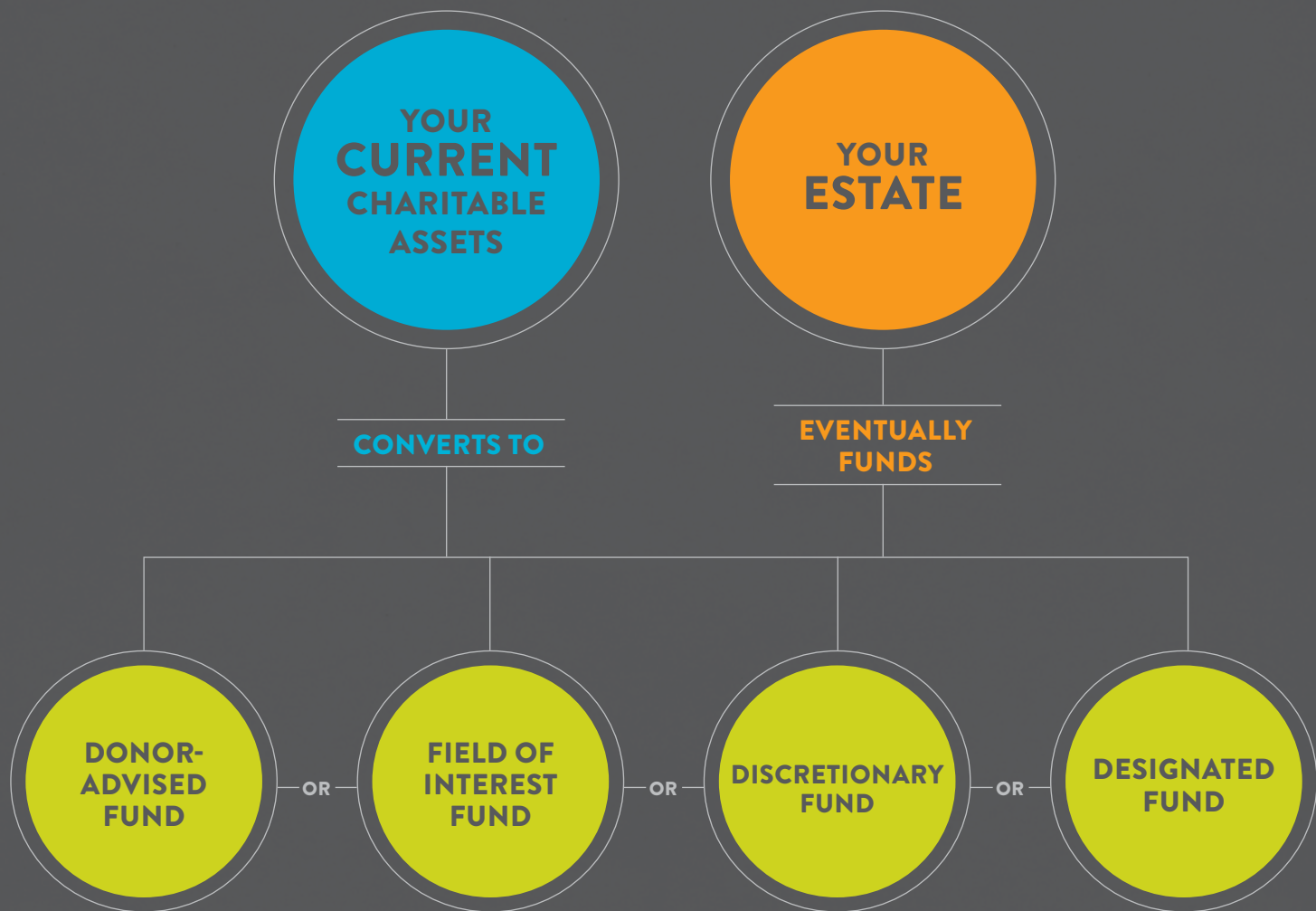
- Minimal administration
- More tax advantages
- Leveraging of your giving
- Perpetuation of impact
- Reduced costs
- Strategic, thoughtful planning

PLANNING YOUR ESTATE FOR TOMORROW.

You can also create an endowment in the future through an estate bequest. An estate gift becomes your perpetual philanthropic legacy articulating your specific goals and enforced by CICF. Your commitment won't begin until matters are settled and your heirs have been addressed.

EITHER PATH LEADS TO THE SAME RESULT:

One or more of the four present and permanently funded vehicles—contractually designed to carry out your intentions forever.



A photograph of a rooftop garden. In the foreground, there are several large, vibrant green leafy plants with reddish stems, likely Swiss chard, growing in a raised bed. The background shows a modern building with a white facade and a glass railing, overlooking a city skyline with several skyscrapers under a clear sky. A large, semi-transparent circular graphic is overlaid on the image, featuring a gradient from dark green to light yellow. The text is centered within this circle.

FOUR VEHICLES TO
**CARRY OUT
YOUR VISION.**

After starting with existing charitable assets or with your estate, you can choose one of four predetermined, permanently funded vehicles to carry out your philanthropic vision in perpetuity. CICF is home to various funds and foundations, including The Indianapolis Foundation and Legacy Fund of Hamilton County. Each individual fund is overseen by a dedicated board, which provides strategic direction for that fund. CICF's philanthropic advisory staff can help you choose which option best suits your individual goals.

DISCRETIONARY FUND.

A permanent fund that directs income at the discretion of The Foundation's board to meet Central Indiana's most pressing needs and greatest opportunities. Want to support vital community projects that you could never anticipate during your lifetime? By creating a discretionary fund, you give The Foundation the flexibility to address your community's most urgent problems—and to support its most promising opportunities now and forever.

FIELD OF INTEREST FUND.

A permanent fund in which your intent will be forever followed in a particular field of interest. A field of interest fund supports a specific cause or issue, and it can be as broad ("fighting hunger in Central Indiana") or as narrow ("supporting maintenance of monuments within the Indianapolis mile square") as you like. Going forward, this becomes the standard by which The Foundation makes grants on your behalf and in your name, if you so choose.

DONOR-ADVISED FUND.

A permanent fund that directs its income according to your ongoing wishes. Think of a donor-advised fund as a charitable savings account that you contribute to as often as you like, and use to recommend grants to the charity or charities of your choice when you are ready. Up to two successive generations may be involved in the distribution of its assets. This is the closest thing to a private family foundation—with oversight and assurance provided by The Foundation's professional staff.

DESIGNATED FUND.

A permanent fund that directs income to one or more specific charities in your name, in perpetuity. If you support a specific nonprofit, and you are confident you want to continue that support in perpetuity, this may be the ideal vehicle for you. In essence, a designated fund is like endowing your current annual gift to your favorite charitable organizations.





**FRANK
& IRVING
MOXLEY
SPRINGER**

During their lifetimes, both Frank Springer and his wife, Irving, served as board members or volunteers for a number of organizations: the Indianapolis Museum of Art, the Indianapolis Art Center, the Garden Club of America, the Civic Theatre, and more. Indeed, when the Springers committed themselves to a cause, they did so with purpose and passion.

“Frank Springer identified a cause, pursued it passionately, and sought the counsel of CICF to help make a long-lasting difference in his wife’s honor. Today, the Springers’ impact on women in Indianapolis is more powerful than ever.”

–JENNIFER POPE BAKER, EXECUTIVE DIRECTOR, WOMEN’S FUND OF CENTRAL INDIANA

So when Irving Moxley Springer passed away, her husband sought to further his wife’s legacy of giving back by establishing the Frank Curtis and Irving Moxley Springer Fund in her honor. Frank enlisted the help of CICF to administer the fund, which would perpetually support the four charities most important to the Springers—most notably issues affecting women.

The fund was capitalized through gifts from Springer’s estate and the remainder from two trust vehicles that had been established to provide income to the surviving spouse. The Springers had also used a private family foundation during their lifetimes, and when Frank passed away that foundation was terminated and its assets were also contributed to the fund.

Initially, the Fund made an endowment gift to Women’s Fund of Central Indiana, another CICF-administered fund. In honor of Irving’s many contributions to family-oriented programs in that area, the Women’s Fund named its planned giving society the Irving Moxley Springer Society. Though both Frank and Irving are now deceased, their fund—and their impact on the issues they cared about—will continue in perpetuity.

GOAL:

Intentional giving to a particular field of interest in perpetuity

FUND TYPES:

Designated Fund
Field of Interest Fund

ASSET TYPES:

Cash
Private Foundation

RESULT:

Establishment of a legacy of financial support of family-oriented programs



A man with a beard and long hair, wearing a blue t-shirt and dark pants, is carrying a large, flat piece of corrugated cardboard. He is walking on a construction site with other workers in the background. The scene is outdoors with green trees and a clear sky. A large, semi-transparent teal circle is overlaid on the image, containing the text. There are also smaller teal circles of varying shades in the background.

BUILD YOUR VISION ON A
FOUNDATION
OF TRUST.

One hundred years later, CICF and its affiliates—including The Indianapolis Foundation and Legacy Fund—are still the partners of choice.

It's a simple matter of trust.

CICF gives you absolute assurance that your philanthropic assets will be applied in a way that aligns with your intentions. You define those intentions today, and we honor them—now, and in perpetuity.

Only CICF can ensure that your legacy will play out according to your wishes, even after you're gone. This doesn't mean you can't ever change the direction of your philanthropic assets. But it does mean that CICF will prevent any violation of your intentions for generations to come.

It starts with an exploratory meeting with one of our philanthropic advisors. It's an opportunity to learn—and to find out firsthand why so many other game-changing visionaries already view us as a trusted partner.



**KYLE
AND STACIA
SIMMERMAN**

Kyle and Stacia Simmerman view philanthropy as a core family value. The young couple grew up in families that were highly engaged in their communities, and now they're making sure their philanthropic spirit lives on in the family they're currently building.

Following the birth of their daughter, Audrey, in 2011, the Simmermans quickly created a living will. Not only did they want to relieve Audrey of any burden if they died unexpectedly; they also wanted to devote a portion of their estate to philanthropic endeavors. Their goal was two-fold: to support their community in perpetuity, and to create a vehicle to teach Audrey about philanthropy in the unlikely case that they couldn't.

“When we teach our children to give back, it has a ripple effect. It pays exponential dividends. There are few more powerful lessons a child can learn than the importance of philanthropy. And nobody facilitates that lesson like CICF.”

—STACIA SIMMERMAN

The Simmermans' will directs a portion of their estate to specific not-for-profit organizations, such as Butler University. It also names the CICF Unrestricted Endowment as a beneficiary, assuring that their funds will support the community's greatest needs in the long-term future. “CICF knows the pulse of the community, and where the needs are,” Kyle says. “Organizations may go away or their needs might change, but CICF will always be in the community.”

For Kyle and Stacia, applying their estate to a community fund was a simple matter of aligning their resources to their values. The Simmermans have also created a donor-advised fund for Audrey, ensuring she'll have the opportunity to learn the value of philanthropy when she gets older. Meanwhile, their unrestricted gift to CICF will allow their funds to address vital future needs that could never be anticipated, making their contribution all the more powerful down the road.

GOAL:

Leave a legacy of philanthropy while improving the community in perpetuity

FUND TYPES:

Unrestricted Endowment
Discretionary Fund

ASSET TYPES:

Retirement Assets

RESULT:

The donor's children will carry on the family's philanthropic tradition, while the future needs of Central Indiana will be addressed through CICF's unmatched community expertise.



A photograph of a conductor in a white shirt leading an orchestra in a park. The conductor is in the foreground, facing the orchestra. The orchestra members are seated in rows, playing various instruments. In the background, a large crowd of people is seated on a grassy hill, watching the performance. The scene is surrounded by lush green trees. A large, semi-transparent blue circle is overlaid on the image, containing the text. Two smaller, semi-transparent green circles are also present, one on the left and one on the right, overlapping the blue circle and the background.

DECIDE TODAY.
**DETERMINE
YOUR LEGACY
FOREVER.**

**A CLEAR PATH TOWARD
A BETTER CENTRAL INDIANA.**

For 100 years, CICF and its affiliates have been the philanthropic partners to our community's visionaries. Big thinkers. World changers. Now it's your turn. Not everyone is in a position to change Central Indiana. But you are.

Now is the time to secure your legacy—and to do something big to make Central Indiana better, stronger, and more beautiful.

One hundred years ago, a few Central Indiana citizens launched The Indianapolis Foundation with nothing more than a vision. Seventy-five years later, Legacy Fund came along to transform Hamilton County.

Now look at where we are today—and just imagine where your vision might lead us tomorrow. Now's the time to lay the groundwork for your legacy, and to build a better future for the place you call home.

*It's your time to shine.
Why wait? Visionaries never do.*





CICF.ORG

