



# Endowment Fund Report 2007-2008

## Welcome!

Welcome to our 2008 Endowment Fund Report which features the Junior League of Waco, Inc., (JLW) endowment funds (Clifton House and Community Projects), donations, and donors who have achieved our established donor levels.

Thank you for your support of our Endowment! Your donations assist us in continuing a strong legacy of leadership and vitality in our community.

### *Sustaining the future of our League!*

Dana Lee Haines  
2008-2009 Endowment Chair  
Hollis Heffner, Vice Chair  
Dory Bryson & Sonya Todd, Endowment Committee  
Sustainer Advisors ~ Jan Copeland, Karen Deaconson,  
& Helen Weathers

## Junior League of Waco, Inc., Mission

The Junior League of Waco, Inc., is an organization of women committed to promoting voluntarism, developing the potential of women and improving the community through the effective action and leadership of trained volunteers.



## What is an Endowment Fund?

An endowment fund, as defined in the dictionary, is an investment fund in which the final returns are intended for a particular purpose to build income for the long-term benefit of the organization.

The purpose of our endowment fund is to assure that the Junior League of Waco, Inc., has a firm financial future for the historic nature of the Clifton House and for creation of Community Projects.

## Junior League of Waco, Inc., Endowment Funds

Charity Ball, in the past, and now the Deck the Halls Holiday Gift Market have been our main event fundraisers. Due to the ever-changing economy, underwriting dollars from year to year can be unpredictable, so in 2000 we established the Junior League of Waco, Inc., Endowment Fund to provide a more stable source of income. The **Community Project** and **Clifton House** Funds will provide a financial base upon which we can continually build.

Since October 1992, the historic Albert Turner Clifton House has served as both the official headquarters of the Junior League and as a beautiful backdrop for wedding receptions, parties & other special occasions. The designation of the Austin Avenue Historic District emphasizes the importance of repairs/upkeep and renovations to the house. The **Clifton House Fund** will help us continue to provide a unique setting for league business and community events.

Of course, extremely important to our mission is our work within the community. The 2007-2008 league year resulted in the completion of 10 community projects & 3 events including Awesome Outings, Rainbow Room, Talitha Koum and the Teen Suicide Prevention Symposium. Our reason for fundraisers and securing underwriters is to make a difference in Waco through various projects. The **Community Project Fund** is another pathway for funds to continue these worthwhile projects.



### Investment of the Fund

Managed by the Waco Foundation since its inception eight years ago, the JLW Endowment has grown significantly. What began with an initial contribution of a few thousand dollars continues to grow in today's economy with the diligence of the Waco Foundation.

Our Endowment comprises two funds: the **Clifton House Fund** & the **Community Project Fund**. Interest from these funds will help insure the Junior League will always be in a position to reach out to our community in the future

DID YOU KNOW...that 5% of the income raised from Clifton House rentals & 2.5% of the income raised through Deck the Halls is deposited in the Endowment Fund each year?

Based on the JLW bylaws and policies when the endowment of the **Clifton House Fund** reaches \$250,000, we will be able to draw funds... 5% shall be distributed to the Junior League to assist Clifton House expenses, the remainder will be reinvested. Once the **Community Project Fund** has reaches \$250,000, 5% interest shall be distributed to the Junior League to assist Community projects.



Endowment Committee introduced Donor Levels during the 2006-2007 League year. These levels represent cumulative gifts from the inception of the fund in 2000.

## *Endowment Fund Donor Levels*

**1935 Society – Greater than \$25,000.00**

**Community Pillar - \$10,000 to \$24,999**

**Community Investor - \$5,000 to \$9,999**

K. Paul Holt and Dr. Donna Miller

**Community Leader - \$2,500 to \$4,999**

Johnny and Sally Bledsoe

The Clifton Foundation

**JLW Friends - \$1,000 to \$2,499**

Mr. and Mrs. Stephen Beard

Boyce and Len Brown

Mr. and Mrs. Spencer Brown, Sr.

Pat Clifton

Extraco Corporation

Amy Torian Fields

Mr. and Mrs. Louis Getterman, Jr.

Don and Martha Howe

Lisa Jaynes

Mrs. J. Rodney Lee

Alice Ogden

Susie Oliver

Kay Olson

Drs. Clay and Dianne Sawyer

Bryan and Rene Taylor

Helen Weathers

***One day...our Endowment Fund donations will support...***



## How Does Our Endowment Fund Grow?

Our fund grows through your generous contributions. You can honor someone on their birthday, remember someone who was important in your life, or simply help us continue the legacy that began 74 years ago with a small group of women who saw a need and decided to make a difference. Your willingness to participate is symbolic of your support of the Junior League and our endeavors.

**Gifts to the Endowment** ~ June 2007- December 2008

### ~Memorials~

**Yvonne Bailey**  
Johnny and Sally Bledsoe  
Edward and Bonnie Carpenter  
Susan Dewitt  
Bill and Cindy Dietz  
Don and Martha Howe  
Rene Taylor \* Angela Tekell  
Jeanne Waggener

**Tracy Burch**  
Dr & Mrs. Kerry Irons

**Carrie Mae Charboneau**  
Christine Dossey

**John and Dorothy Goble**  
Helen Weathers

**Leslie Horne**  
Cindy Smith

**Betty Jackson**  
Bill and Cindy Dietz  
Cindy Smith

**Raymond Kapczynski**  
Charles Oswalt  
Gwynn Slavik  
JLW Finance Council

**Dr. John Wesley "Sonny" Lane**  
JLW Publications Committee  
Cindy Dietz \* Helen Weathers

**Amy Mann**  
Steven & Sharron Cutbirth  
Wilkinson-Hatch-Bailey Funeral Home  
Carolynne and Ed Burleson  
Frank and Sally Gentsch, Jr.  
Don and Martha Howe  
Lea Ann Locke  
BMR, Inc.

**Billie Schultz**  
Cindy Dietz \* Marsha Green  
Matt, Ashley, Rachael, & Sarah Stephens

**Dayna Schwartze**  
Johnny and Sally Bledsoe  
Raymond and George Kapczynski  
Cindy Smith

**Jim Shero**  
Diane Schuetze

**Lauri Smith**  
Merryl Jones \* Suzi Pagel

**Danna Beaty's mom**  
Cindy Dietz

### ~Memorials~

(cont'd)

**Stan Swift**  
Helen Weathers

### ~Tributes~

**Michael Blades and family**  
Kandice Blades

**The Clifton Foundation** –  
William L. Clifton, Jr.  
James R. Clifton  
Mary Clifton Chase

**Marsha Green**  
Dianne Sawyer

**Becky Parker**  
The Cowley Group

**Missy Larson**  
**Kay Olson**  
**Becca Mann**  
Cindy Dietz

**Donna Miller**  
Marsha Green \* Dianne Sawyer

**Sheryl Swanton**  
Lea Ann Locke

**Paula and Jerry Campbell and family**  
**Linda and Rick Bostwick and family**  
**Cynthia and Rod Squires and family**  
Greg and Alice Ogden

**Caleb Rieger**  
**Luke Braden Fineske**  
JLW Finance Council

**Dr. Dianne Sawyer**  
Marsha Green \* Dr. Donna Miller

**Rowan Butler Swartz**  
Patrice Wills

**Kim Zander**  
Kenneth and Diane Schuetze

**2009-2010 Board of Directors**  
Merryl Jones

**Dr. Martha Agee \* Karen Conine**  
**Tammy Harralson \* Charissa Sloan**  
**Amber Adamson \* Amanda Thomas**  
**Jill McCall \* Sally Firmin**  
**Jean McReynolds \* Helen Weathers**  
**Kathy Douthit \* Rene Taylor**  
**Dana Lee Haines**  
JLW Training Committee

**Paula Parish**  
**Diane Pittman**  
Kathy Myatt

**Cindy Dietz \* Mary Helen George**  
**Len Brown \* Gretchen Eichenberg**  
**Elizabeth Dietz \* Dana Lee Haines**  
Missy Larson

**JLW Endowment Fund**  
Dr. Donna Miller \* Dana Lee Haines  
Susie Oliver \* Gwynn Slavik  
Lisa Smyers \* Elizabeth Vardaman



***Developing Potential of Women***



***Improving Communities***



***Promoting Voluntarism***



Donate @ [www.jlwaco.org](http://www.jlwaco.org) or send c/o Junior League of Waco, Inc., Attn: Endowment Fund, 2600 Austin Avenue, Waco, TX 76710



Attn: Endowment Fund  
2600 Austin Avenue  
Waco, Texas 76710

ADDRESS CORRECTION REQUESTED