DONOR PROFILE: A LIFETIME OF SUPPORT

When Joe Stigler signed up to caddie as a sixth-grader in Cincinnati, Ohio, he was given the number 539. That’s how many caddies were working at Clovernook Country Club, in the heart of the blue-collar neighborhood where his family lived. With so much competition, Stigler needed to distinguish himself. He quickly realized that customer service was the way to get ahead.

He hustled, calculated accurate yardages and tried to help the Clovernook members however he could. Soon, players were requesting him for their rounds.

“That stuck with me my whole business career,” said Stigler, who eventually earned a full tuition and housing Evans Scholarship to attend the Ohio State University.

“My comment to everyone in our business is, ‘We have a high-service-level business. It doesn’t cost us anything to out-service the competition.’ It really stuck with me, and I felt like I learned that caddying.”

Today, Stigler is the president of JDM Capital, an investment firm he runs with his son. He and his wife, Margie, divide their time between Montgomery, Ohio, and Sarasota, Florida. He stays connected to the Evans Scholars Program, serving as a WGA Director at Kenwood Country Club in Cincinnati.

He calls his experience in the Scholarship House at Ohio State “a complete change of life.” Stigler was one of seven Clovernook caddies to earn the Evans Scholarship in 1970. He graduated with an accounting degree in 1974.

“It was an incredible atmosphere and a very competitive academic atmosphere,” he said. “There was a real sense of accomplishment, satisfaction and thankfulness that we were given that opportunity.”

After college, Stigler found that his status as an Evans Scholars Alum was an advantage. He took a job as a CPA, but quickly decided it wasn’t for him. When he switched careers and went to work for an industrial valve company, it just so happened that his new boss was a strong supporter of the Evans Scholars Program.

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MAKE AN IMMEDIATE IMPACT WITH YOUR GIFTS

If you would like to maximize the impact of your support of the Evans Scholars Foundation today, consider one of these strategies:

1. **Make tax-free gifts to the Evans Scholars Foundation from your IRA.**

   If you are age 70½ or older, you can give directly from a traditional or Roth IRA completely free of federal income tax (up to $100,000 per person per year; $200,000 per couple with separate IRAs). Giving directly from your IRA won’t increase your adjusted gross income and possibly subject your Social Security income to a higher level of taxation. Additionally, your charitable IRA gift may count toward your required minimum withdrawal.

2. **Use appreciated stock to make your year-end gifts to the Evans Scholars Foundation.**

   To receive maximum tax savings from your year-end gifts, use stocks, bonds and mutual funds that you have owned for more than one year and that have increased in value. These gifts are generally deductible for their full current value and you do not have to pay capital gains tax that would be due if you sold the assets. Additionally, gifts of these type of assets can eliminate tax on up to 30 percent of your adjusted gross income.

   If you have securities that have decreased in value since you have owned them, consider selling them and making a deductible gift of the cash proceeds. This creates a loss that you may be able to deduct from other taxable income along with the cash proceeds you contribute.

**ACT NOW**

When making a gift of securities or retirement plan assets, check with your advisors to ensure your gift is completed properly and in a timely manner. To enjoy the full benefits on your 2017 tax return, gifts must be completed by December 31. We will be pleased to assist if you have questions, or you can visit our website at [wgaesf.givingplan.net](http://wgaesf.givingplan.net).

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There are a record 965 Evans Scholars enrolled in 19 leading universities nationwide this year.

The purpose of this publication is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting or other professional advice. For assistance in planning charitable gifts with tax and other implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Tax deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states. © Copyright 2017 by Sharpe Group. All Rights Reserved.
“He heard that I was an Evans Scholar, and that was absolutely the reason I got hired,” Stigler laughed.

From there, he built an industrial manufacturing career that included starting two successful companies of his own. Caddying still played a major role—at Clovernook, he had formed a close relationship with a member for whom he often caddied.

That member turned out to be a mentor to Stigler throughout his career.

“When I got out of school and went to work and eventually got into the business myself, he opened many doors,” Stigler said. “The relationship was a long-term relationship.”

As the Evans Scholars Program has grown, expanding to the record 965 Scholars enrolled in 19 leading universities this fall, Stigler has made a point of giving back. He’s supported the annual Par Club fundraising campaign as a Match Play Partner and contributed to capital campaigns to fund new Scholarship Houses at Ohio State and Miami University. He and Margie have also included the Evans Scholars Foundation in their personal estate plans with a planned gift.

Stigler recalls the groundbreaking for the Ohio State Scholarship House as a turning point. He listened to the speakers during the ceremony, and having just experienced a liquidation event with one of his companies, he made a decision to support the Program more significantly.

“It opened my eyes,” Stigler said. “When something significant happens with a business, it kind of changes the game and allows you to say, ‘OK, now what am I going to do?’ ”

The Evans Scholars Program is just as academically competitive today as it was when he graduated, with Scholars maintaining a cumulative 3.3 GPA and a 95 percent graduation rate. When Stigler sees the Scholars at his club—Kenwood has seven this year—he feels a sense of pride.

He’s been in their position, and he knows exactly what the Evans Scholarship can do to change a life.

“Obviously, for me, it’s easy to support the Evans Scholars Program,” Stigler said. “It was such an opportunity for me and such a big break.”

INCLUDE GIFTS TO THE EVANS SCHOLARS FOUNDATION IN YOUR WILL OR TRUST

Your will or trust is a wonderful way to make gifts to continue your support of the Evans Scholars Foundation in the future. You can make a gift through a simple provision in a new will or trust, or through an amendment to your current plans*.

Gifts to the Evans Scholars Foundation may be arranged in several ways:

- **Give all or part of the remainder** of your estate (the “residue”) after gifts to loved ones are fulfilled
- **Provide a gift of a specific dollar amount**
- **Designate a percentage of your estate** be given to the Evans Scholars Foundation
- **Give a certain property** (securities, real estate or other items of value)
- **Make a blended gift**—a specific amount plus a percentage or all the residue

A MEMORIAL OR HONOR GIFT

You can arrange any of these gifts in memory or in honor of someone special, such as a spouse, family member or other loved one.

See Page 4 for sample bequest language you may want to share with your attorney. If we can help with the charitable aspects of your plans, please contact us.

*If you already have a will or trust, you may add a charitable bequest to it through a “codicil” or amendment.
PROVIDE FOR FAMILY AND THE EVANS SCHOLARS FOUNDATION

When planning for the future distribution of their assets, many people are surprised to learn how many ways there are to include the Evans Scholars Foundation in their plans, after first providing for the future needs of family, friends and other loved ones. You may wish to consider one or more of these methods to make a special gift while also giving to family and friends.

- Name the Evans Scholars Foundation as beneficiary of all or a portion of the remainder of retirement plan accounts. Designating the Evans Scholars Foundation as a beneficiary of an IRA or 401(k) does not require you to change your will and, because of the possibility of double taxation, it can be wise to direct these assets to charity and give other assets to your loved ones.
- Give a share in the proceeds of life insurance policies no longer needed for their original purpose, such as for the payment of estate taxes that may no longer be due.
- In many states, it is possible to direct that whatever remains in bank accounts and investment accounts becomes a charitable gift that will pass free of estate tax and outside the probate process.

Return the enclosed card or visit our website at wgaesf.givingplan.net for more information about any of the ideas presented here. We will be happy to help, confidentially and without obligation, with the charitable dimension of your plans.

Considering a Bequest?

By including the Evans Scholars Foundation in your will or trust, you are investing in the future of young men and women—one caddie at a time. If you are considering a bequest to us, here is some suggested wording to take to your attorney:

“I (we), ____________, give and bequeath ______________ to the Evans Scholars Foundation [Tax ID# 36-2518129], an Illinois charitable trust located in Golf, Illinois, to be applied to the general purposes of the program.”

Evans Scholars Foundation

For questions or more information, please contact:
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More than 10,600 young men and women have graduated as Evans Scholars since 1930.