

BUILDING A LEGACY FOR YOUR COMMUNITY

The earnings from the general community fund are used to provide grants to a wide range of organization.

OUR VISION

That our entire community, our people and our prosperity, continue to grow in healthy and hearty ways.

OUR MISSION

By identifying and understanding our community's needs, creating and maintaining partnerships that support effective solutions, and engaging and stewarding caring investors who fund our endowments and our grants, we are growing our entire community.

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Board of Directors

The Morris Area Foundation Inc. Board of Directors is a broad based volunteer-driven organization that brings local knowledge and experience and a network of area relationships to its board.



Del Stevenson – Chair

Del was born and raised in the Morris area. After graduating from Morris Collegiate, he worked in the banking field at various locations in Manitoba and Saskatchewan before returning "home" in 1974.

Del retired in 2004 after 24 years with Access Credit Union. He worked along with other founding members to establish the MAF and has served as Chair since 2015.

He enjoys the outdoors, spending time in the summers at the cabin on the Lake of the Woods.



Curtis Evenson – Vice Chair

Curtis Evenson has been on the MAF Board since the start in 2014. He is currently Vice President and the Chair of the Granting Committee.

Curtis has an Agricultural Economics degree from the U of M. He is a retired farmer, currently the Administrator of the Manitoba Association of Agricultural Societies and a part time Program Officer for the Canadian Agriculture Partnership program with Manitoba Agriculture.

He and his wife Patricia have 4 children and 4 grandchildren. Curtis has been involved in various Morris area organizations for well over 40 years.



Shelley Stupnisky – Secretary

Shelley and her husband chose Morris and small town life as Home Hardware store owners many years ago. As their children grew, they volunteered with their clubs and with many community organizations. When they sold their business a few years ago, they chose to remain in Morris and continue their volunteer commitment. Shelley has been a director with MAF for 5 years, 3 years as secretary and also serves as liaison with the Youth In Philanthropy group. She enjoys participating in community events to educate and encourage donations to the Morris Area Foundation.

Board of Directors

OUR VALUES

Commitment

We give our time and energy to support the growth of our community foundation and, in turn, our entire community.

Thoughtfulness

We place effort into understanding our community's needs before making decisions and taking action.

Support

We provide assistance to the local charities and organizations that are helping our community grow.

Integrity

We follow a code of especially moral values, of honesty, and of accountability.

Courage

We persevere, in the face of challenges, as we undertake our work as a community foundation.

Inclusiveness

We invite participation by all members of our community, and actively seek their input and perspective in helping us achieve our goals.



Midge Anderson - Treasurer

Midge has been with the Morris Area Foundation Board since its birth in 2012 and is the current Treasurer. She believes strongly in the concepts of community foundations and the benefits to communities.

Prior to her retirement, she worked in the Municipal field, as CAO of the Town of Morris and acted as a consultant for numerous Manitoba municipalities.

Midge is a long-time resident of Morris who has been volunteering in the community for many years. Her parents set the role model by volunteering in the church and the community, which she in turn has now instilled in her children. Having raised 3 girls, she now has time to enjoy her 8 grandchildren.

Midge was born in South America and after returning to Canada at the age of 4, she lived on a farm and went to a one-room school for two years before moving to Morris. She is the oldest in a large family of 11 children.

Midge enjoys family, travelling, gardening, wood carving, and her cottage - where every day is an adventure!



Brendan Heppner – Director

Brendan was born and raised in Winkler, MB and then started his insurance career at Rempel Insurance Brokers in Morris in 2007. During this time he played hockey for the Pembina Valley Twisters (MMJHL) in Morris and started to get involved with volunteering in various different events within the community. He has been working for Rempel Insurance Brokers for over 15 years and continues to play hockey on multiple different teams.

Brendan has been a director with the Morris Area Foundation for over 3 years. In his spare time he enjoys playing hockey, golf, tennis and baseball. He also enjoys going to the cabin in the summer time and snowmobiling in the winter.



Egon Grossman – Director

Egon retired after selling his trucking businesses that he and his wife owned for 18 years - Morris-St. Jean Transfer and Altona Freightways. Egon is a founding member of the Morris Area Foundation and he enjoys reading and gardening.



Dennis Mathies – Director

Dennis has been a director with the Morris Area Foundation for 3 years.

Dennis grew up and lives near the community of Lowe Farm. He recently retired after being employed with Access Credit Union for 41 years. He has been involved with various committees and boards in the credit union system and in the communities of Lowe Farm and Morris.

Dennis spends much of his time in summer working on his yard. He is a motorcycle enthusiast and is a director for the Southern Manitoba Harley Owners Group Chapter and also the coordinator for the groups annual Children's Hospital Foundation of Manitoba Toy Run.



Bruce D. Gregory – Director

Bruce Gregory has engaged in the general practice of law continuously since his call to the bar. Bruce graduated from the University of Winnipeg with a Bachelor of Arts degree (majoring in economics) and from the University of Manitoba with a Bachelor of Laws degree.

Bruce has been an active member in the Morris community for many years. He has served on several boards, including the Morris Chamber of Commerce and the Morris Community Development Corporation. Bruce enjoys outdoor activities, especially running, kayaking, fishing and skiing.





Mel Baxter – Town of Morris Rep

Mel represents the Town of Morris Council on the Morris Area board. As such, he reports back to council on the activities of the MAF and brings forward ways that the Town may assist the Morris Area Foundation. Mel is a retired Pharmacist having managed Valley Super Thrifty Pharmacy in Morris for 25 years and serves on the library, handiVan and golf course boards in the Town of Morris.



Merv Dueck – RM of Morris Rep

Merv currently serves on the MAF board as the RM of Morris representative for the past 5 years. Merv is a councillor for the RM of Morris since 2010. He also currently serves on the Pembina Valley Water executive board for the past 3 years, and on the RRBC south chapter board for over the past 10 years, as the RM of Morris representative.

Merv graduated from the Rosenort Collegiate, then farmed until retirement on the family homestead and where he became a veteran of fighting around 8 floods. While raising five children, he was involved on the executive and managed a number of minor hockey and baseball teams, and travelled across Manitoba, Canada and the USA to watch them play. Merv ran approximately 12 provincial level tournaments and served on the community center district board for around 20 years.

Merv has served on many other community organizations over the years, including Chamber of Commerce, Manitoba Pool, local Coop store Board as well as on many local church committees including chair of the Church council for approximately 12 years.

Merv got to know a lot of people during his 12 years driving ambulance out of Morris and driving school bus for the local school division for over 20 years. Merv retired from farming and moved into Rosenort in 2017.



Lynda Lambert – Community Foundations Coordinator, Endow MB - South Central Region

Lynda has worked within the community foundation movement since 2014 with the Morden Area Foundation. Lynda joined the Endow Manitoba team October 2020 and the Morris Area Foundation (MAF) team as at October 1, 2020. Lynda works directly with 4 community foundations including Steinbach, Morris, Plum Coulee, and Morden. Lynda is very passionate about community foundation work and is very excited to be part of the movement and working with the Morris Area Foundation.

Lynda has been hired through Endow Manitoba's Regional Staff Program to bring sustainable human resource capacity to Manitoba community foundations. For the first five (5) years of the program, Endow Manitoba will subsidize 50% of the salary/benefits and 100% administrative expenses.

Lynda lives in Morden, MB, enjoys riding motorcycle, fancies herself as an artist through painting and sewing, and loves hosting dinner parties with friends and family.



Cris Dominguez – New Director in 2022

Cris has worked in the agriculture industry in the Morris area for the last 5 years. He grew up in Kane and moved to Morris in his early teens. He enjoys playing sports such as golf, baseball, and hockey. Cris is looking forward to being a contributing member of the Morris Area Foundation



Jackie Murray – New Director in 2022

Jackie Murray was born and raised in Morris, Manitoba and has always been engaged in giving back to her hometown community. She holds a Certificate in Public Sector Management and a Masters Degree in Public Administration

Jackie has a 21 year career in the pharmaceutical industry working with Johnson and Johnson and Abbott Diabetes Care also managing the Manitoba Government Relations portfolio Jackie worked as a Policy Analyst with The Manitoba Women's Directorate and the Policy Management Secretariat of the Premier's Office. Jackie is heavily involved in volunteering with The Juvenile Diabetes Research Foundation and serves on the Animal Welfare Appeals Board with the Province of Manitoba. She loves spending time with family, history, live music, good food and wine and travelling the world.

Ways to Donate

Publicly listed securities

To get an added tax advantage, you may donate securities listed on specific stock exchanges, mutual funds and segregated funds instead of cash. Under a recent change to the Income Tax Act, the effective taxable capital gain from the disposal of the security will be zero instead of one-half.

Bequests of life insurance or registered plans

You can donate the proceeds upon death from a life insurance policy, RRSP, RRIF or TFSA by naming the charity as the beneficiary, or by naming the estate as the beneficiary and naming the charity in the will to receive the proceeds. Such charitable gifts are treated as if they were made in the year of your death and are eligible in determining the charitable donation tax credit on your final tax return or the immediately preceding return.



CHAIR'S REPORT

Together we can improve our communities. We can make a difference!

Despite another year of Covid disruption, the Morris Area Foundation (MAF) has again made significant progress.

The Endow Manitoba Giving Challenge held in November has broken MAF's previous records, with both the number of donors and the amount of monetary gifts. Raising over \$41,000, MAF's general community endowment fund has grown to just over half million dollars thanks to the generous support received.

The Foundation's new accounting system is now in place thanks to the support of Endow Manitoba. We much appreciate the new laptop and software as well as set up and training provided by the Endow Manitoba team.

Recognizing the need to build a fund, wherein the interest earned will help to cover the expenses of operating a growing community foundation, has prompted the Board to start a new Admin Support Endowment Fund. Income from this fund will be used to assist with MAF administration costs.

We greatly appreciate the support we

have and continue to receive from Endow Manitoba, both financially as well as advice and assistance with board and accounting responsibilities.

This coming year we plan on expanding the board with more diversification in age and geography. Board training is planned in the fall of 2022 for new as well as current members.

The work of a community foundation is ever evolving. However, the work of a community foundation is also here forever. Growth does not happen all at once but is driven by small steps as the MAF board strives to become a trusted, reliable, and predictable source of funding to assist in meeting community needs.

If you do not have a lot to give financially, volunteering can be just as valuable as a monetary gift. Volunteers are needed to create awareness of the Foundation, serve as board or committee members, and carry on MAF's day-to-day operations.

Together we can improve our communities. We can make a difference!

THE MAF HAS SUPPORTED A WIDE VARIETY OF PROJECTS

2021 Morris Area Foundation Grant Committee Report

After a very busy 2020 which included grants through the Emergency Community Support Fund and the Build 150 Program, 2021 settled into a more normal granting program. In total for 2021, the MAF was able to support 8 projects for a total of \$13,500.

This year grants were awarded to:



(1) Morris Community Gardens - \$1,500 for the Replacement and Upgrade of Raised Garden Boxes. MAF Shelley Stupnisky and Midge Anderson presented Pat Rempel chair of the Morris Community Gardens project with a cheque for \$1,500 to assist in the replacement and upgrade of 6 raised garden boxes.



(2) Morris & District Centennial Museum Inc. - \$1,000 for the purchase of the Museum Collections Management Software. This Manitoba Museum designed software will provide greater fields for descriptions and locations in the Museum and will allow the public access to databases in the future.



(3) Habitat for Humanity Manitoba – MAF Director Dennis Matthies and Curtis Evenson (Vice-chair) present to Habitat for Humanity Manitoba board member Mike Palitsky in support of the Rosenort “Home Build” project.



(4) HEART Team Inc. – MAF Shelley Stupnisky (Secretary) and Curtis Evenson (Vice-chair) present a \$2,000 cheque to Paul Maendel and Manuel Maendel of the HEART Team Inc. in support of the “Water Rescue Hovercraft Purchase”.

THE MAF HAS SUPPORTED A WIDE VARIETY OF PROJECTS



(5) Red River Wellness Committee – MAF Curtis Evenson, Midge Anderson and Del Stevenson present a cheque for \$1,500 to Fred Kelesnik (Board Member) and Susan Chartier (President) of the Red River Wellness Committee in Morris in support of the outdoor courts rebuild project across from the Morris School.



(7) Morris Manor – \$1,500 for the replacement of the fridge and other small improvements in the common room of the Manor. More use of the common room is anticipated now that all the Manor's suites are fully occupied.

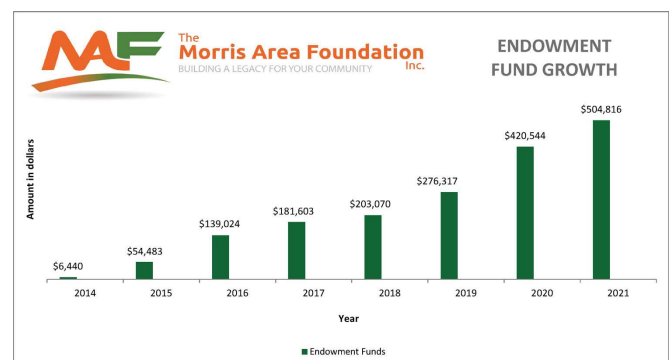
Since its beginning in 2013, the Morris Area Foundation has provided grants with help from the: Thomas Sill Foundation, Canada 150, Emergency Community Support Fund, Build 150 and the generous support of past and current residents of over **\$130,000 to area organizations.**

Morris Area Foundation Inc. is building a legacy for the communities we serve.

The Foundation partners with donors to build permanent endowment funding to support projects in the area into the future. **The Morris Area Foundation Inc. covers the entire Rural Municipality of Morris including the communities of Rosenort, Lowe Farm, Aubigny, Sperling and the Town of Morris.**



(6) Morris Area Senior Services, Inc. - MAF Midge Anderson (Treasurer) and Shelly Stupnisky (Secretary) presents a cheque to Pat Eidse co-ordinator Morris Area Senior Services to assist in the purchase of food containers for the congregate meal program in Morris.



Ways to Donate

Cash Donation

This is the simplest type of donation. But before dropping that cheque in the mail, you may wish to consider alternative giving strategies that can increase the benefits of the donation for you, your charity, and your estate.

Donate Online

Online donations are processed without charge by The Winnipeg Foundation through the Endow Manitoba website. <https://www.endowmanitoba.ca/make-a-gift/> Select the Morden Area Foundation, and follow the prompts.

Gifts in Kind

These are donations of property including artwork, securities and real estate. Tax credits for 'gifts in kind' donations are determined by the fair market value of the gift at the time of the donation. However, you must also report any resulting capital gain or loss on the disposition of that property.

YOUTH IN PHILANTHROPY

Morris School



Rosenort School



Youth in Philanthropy is an organization that aims to get junior high and high schools students involved in community service. It also strives to teach young people about the importance of giving back and how that benefits local charities.

The Morris Area Foundation has worked with schools in Morris and Rosenort to have Youth in Philanthropy groups within their schools.

Each year the two schools are given \$2,500 dollars to allocate to local charities and organizations in need of funds. Students involved in the group understand that there is always a need for something in the local area, and they are very proud and blessed to be able to help others out.



Ways to Donate

Charitable Remainder Trusts

You make a gift to a charity during your lifetime yet continue to receive the income generated by the investments. Through an irrevocable inter vivos trust (known as a Charitable Remainder Trust), the charity you name is established as the capital beneficiary. However, the capital is not accessible to the charity during your lifetime. All interest and dividends earned by the trust are paid to you as taxable income. You receive a charitable receipt equal to the present value of the capital which the charity is expected to receive at the time of your death. The donation is removed from your estate and would not be subject to probate fees or claims by creditors.

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ENDOW MANITOBA GIVING CHALLENGE



November 15 – 21 Endow MB Giving Challenge week. The Morris Area Foundation (MAF) raised a total of \$41,395.20. Congratulations!

This challenge is an opportunity offered by Endow Manitoba that upon raising \$10,000, Endow MB will match funds by \$2,000 plus the Government of Manitoba will match funds by \$2,000. PLUS MAF received further matching funds from the following generous organizations: Lowe Farm Credit Union - \$2,000, Morris Credit Union - \$2,000, Rempel Insurance - \$2,000, Bigway - \$2,205.20. A \$10,000 challenge quickly became a \$22,205.20 investment in the MAF community. Who doesn't get excited by an opportunity like that?

The annual Bigway "Round Up" was a huge success again this year too. During the 10-day event held in November, Bigway staff at the tills invited customers

to "round up" their purchases to the next dollar with the change gifted to MAF. Morris Bigway generously matched the gifts received at the till, resulting in \$2,205.20 raised toward the Morris Area Foundation General Community Fund.

A big thank you to Pat and staff for their continued community support these past years!

This annual event is an excellent way to grow the MAF endowment quickly. The residents of Morris are very gracious therefore breaking through the original goal once again. A sincere thank you to all.





NEW ADMINISTRATION FUND

This new fund was set up by the MAF Board of Directors to assist in the sustainability of the MAF's future operations. This is a responsible and effective avenue for the MAF to support itself in any and all administration costs and expenses whether budgeted or incurred. All are welcome to contribute to this fund.

LEGACY ESTATE PLANNING

Plan now to create a legacy that reflects your life and help our community For Good. Forever. A legacy gift can support the cause you are passionate about. Choose your cause, how you want to help, and a legacy gift will fulfill your future wishes.

What is a legacy gift? A legacy gift is a future charitable gift through one or more of the following:

- Will
- Listed appreciated securities
- Life insurance
- Retirement assets (RRSP, RRIF)
- Charitable remainder trusts
- Residual interest

Legacy gifts to the Morris Area Foundation can be directed to an existing fund, or you can create your own endowment fund.

What is an endowment fund? An endowment fund is like an investment account for our community. Gifts are permanently invested and a portion of the income earned (the spending policy) is distributed every year to local registered charities as grants.

Why make a legacy gift to the Morris Area Foundation? There are a lot of great reasons. You can...

- Make an impact in your community.
- Honour your values while supporting others.
- Support a cause you care about.

Since endowment funds are permanent, you will help our community For Good. Forever.

How to make a legacy gift to the Morris Area Foundation. The most common legacy gift is a charitable gift through a Will (bequest).

We are here to help you make sure that your gift supports what you care about...because we care about it too!

We will document your instructions carefully to ensure that we use your gift as you intend. You or your lawyer may also wish to have us review any Will wording naming the Morris Area Foundation to ensure we fully understand your wishes and to confirm that we can administer your gift as you prefer. It is essential to remember to provide the lawyer drawing up your Will with the correct name and charitable registration of any organizations named in your Will. The Morris Area Foundation's charitable registration number is **88029 6413 RR0001**.

Tax Benefits of All Bequests. Charitable bequests provide for your favorite cause with the potential of greatly reducing taxes owing and helping preserve the value of your estate.

Join us for Creating your Legacy. Want to learn more about including a charitable gift in your Will or estate? We hope you can join us for more information at a Creating your Legacy session.

These presentations are a great introduction on how you can plan now to create a legacy that reflects your life and helps our community. Learn how easy it is to:

- Leave a bequest for a cause close to your heart
- Create a personal or family legacy
- Give as part of your estate plan (there are tax benefits!)

Contact the MAF office for the next presentation date.

* The above is provided for information only; the Morris Area Foundation encourages you to seek guidance from a professional lawyer.

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2021 INVESTMENT DONORS

All donations small or large add up to a strong, vibrant, and caring community. Thank you to all donors for your partnership and investment in Morris and area.

FUNDS

Morris Area Foundation Managed Fund - supports the day to day operating expenses of the MAF to enable the good work to continue in the Town of Morris and surrounding area within the Rural Municipality of Morris.

Morris Area Health and Wellness Fund - supports initiatives of health and wellness benefiting the area served by the Morris Area Foundation.

Morris Rosenort School Youth in Philanthropy Fund – supports initiatives of the Youth in Philanthropy organizations within the Morris Rosenort school. This organization serves as an opportunity for youth to learn about local service organizations and take part in philanthropic work within the Municipality of Morris.

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- Decima A
- Dickson J & A
- Dickson W & S
- Dueck Mervin
- Dupuis E
- Edel D & S
- Edel Darcie
- Edel G
- Edel M & W
- Elias J & J
- Erickson Lou
- Estate of Helen Godkin
- Evenson C & P
- Evenson Craig
- Fitchett M
- Fulford R
- Fyfe R
- Goddard A Charitable Contribution Fund
- Godkin R & S
- Grossman E
- Hamblin C & J
- Hamblin L & C
- Harder Dean
- Jennings B
- Kelesnik F & S
- Klaassen D
- Lewis J
- Manikel G
- Martin M
- Mazinke I & W
- McCrary L & A
- Moore Dan
- Morris Bigway
- MWM Environmental Waste
- Peters F & H
- Peters Jacob
- Reckseidler A & A
- Rempel D
- Rempel Insurance
- Remple L
- Robert C Manness Medical Corp
- Robert L
- Rosenort Motors (1979) Ltd
- Ross A
- Schiewe E
- Schmidt C
- Schwark Hartley
- Shewchuk B
- Skoglund L
- Sommer L
- Southam D & I
- Stevenson C & J
- Stevenson D & B
- Stevenson K & S
- Stupnisky S & B
- Swift D
- The Winnipeg Foundation
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- Voigt H
- Wiens L & L

Thank you

