



At Heritage Fund We Help You Do
Your Philanthropy. Your Way.



A young couple moved to Columbus in 1968 looking forward to building a family and starting their careers. He went to work for Cummins, rising steadily in the management ranks. She worked for the Bartholomew Consolidated School Corporation (BCSC) as an elementary school teacher emphasizing math and science.

Like many teachers, she was constantly seeking new ways to get her young students interested in and excited by the subjects. Often the ideas she discovered had to be funded out of her own pocket because there was not money available for added teaching ideas or materials. In a two-income family those “extras” were manageable, but these budding philanthropists understood that was not the case for all teachers.

Fast-forward 50 years, and the couple now is preparing to move to their retirement home but not before leaving something behind for the community that supported them in their professional and family lives.

Knowing about the opportunity to make charitable contributions from an IRA at age 70½, they thoughtfully had been preparing to create a fund to help all teachers afford those “extras” that come along with being a creative educator.

Just weeks before their big move, they established a Field of Interest

Fund to make money available to BCSC elementary school teachers who have new, innovative and creative ideas to make math and science fun and engaging for their students. Heritage Fund works closely with the BCSC Foundation to let teachers know about this fund and how they can apply.

This couple likely never thought of themselves as philanthropists, but they took advantage of charitable tax exemptions and did some admirable reflection on how they might help others traveling the same road as they did for many years.

They said, "As we look into the future of our community, we have a vision to help support young students with their aspirations as they address their future challenges through the venues of math and science. We hope these funds will be used in a variety of ways to stimulate, excite and inspire elementary students in these areas."

A bit of solid financial planning and many discussions about how that money could be used went into creating an opportunity for today's teachers looking for new ways to engage their students.

This is a shining example of philanthropy driven from the heart and the head. It is also a great reminder that many of us can be philanthropists with a bit of planning and a desire to make something better.

Tracy Souza is president and CEO of Heritage Fund – The Community Foundation of Bartholomew County. Contact us at 812-376-7772 to learn more about how we can help you do Your Philanthropy. Your Way.

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