

SARA Alumni Dinner 2015

April 18, 2015



In Memorium

Kenneth L. Klika 1945-2014



2014-2015 Team Highlights

**1st Dad Vail Champion
Patrick DelBarba**



WN4+ 3rd at Head of the Grand



New 1x



WV4+ 2nd at MACRAS



4th Year in a Row Winning Home Schools



Spring Break Trip to Florida



**5,250,116 meters
46 participants in
Concept 2 January
Team Challenge!**

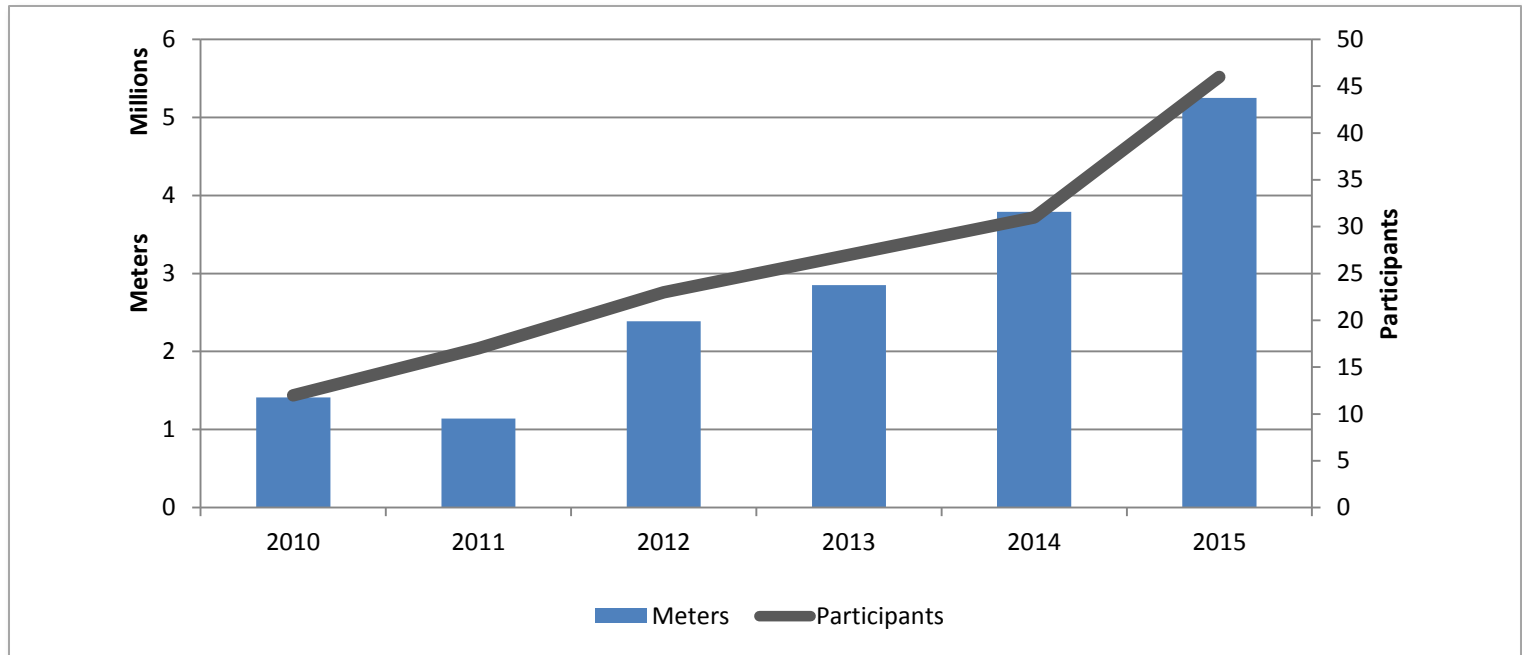


Christened new racing venue – Aurora Lake

Thanks for Coming Today!



JVTC Participation & Meter History

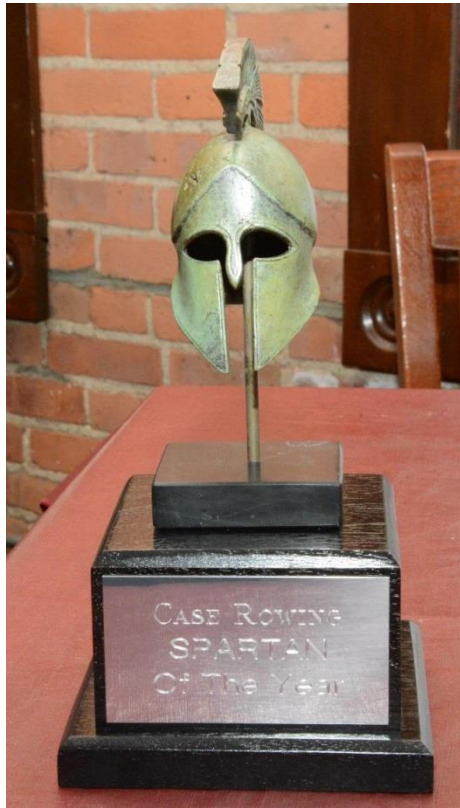


25th Anniversary



Spartan Rowing Alumni Award 2015

Stephanie Merlino & Abby Sevier

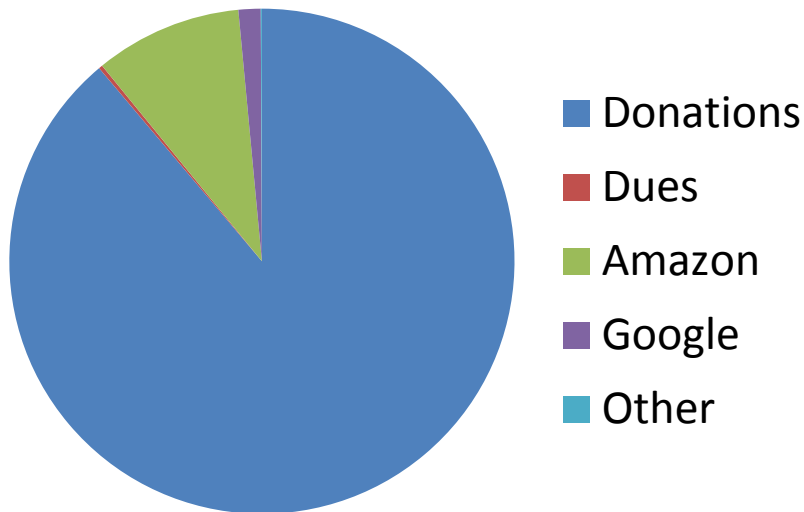


How Are We Doing?



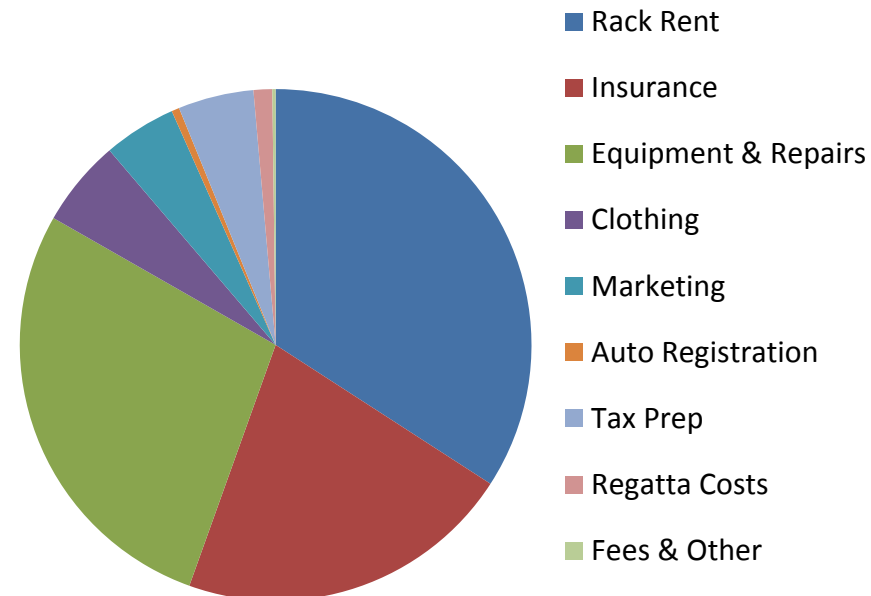
SARA Sources & Uses of Funds 2014

Total Income



Total: \$27,097

Total Expenses



Total: \$12,042

SARA Income & Expense Trends

	2014	2013	2012	2011	2010	2009	2008	2007
Donations & Fundraising	\$24,113	\$23,707	\$67,813*	\$35,460	\$133,265†	\$24,345	\$31,711	\$13,164
Rack Rent ⁱ	\$4,110	\$3,680	\$3,152	\$1,445	\$1,100	\$900	\$325	\$0
Insurance	\$2,571	\$2,571	\$2,553	\$2,207	\$1,592	\$1,212	\$367	\$0
Coaching			\$50,000					
Equipment‡	\$14,061	\$10,031	\$10,051	\$44,486	\$19,794	\$25,928	\$20,516	\$14,444

* Includes \$50,000 transfer to CWRU for Coaching
† Includes \$100,000 transfer to CWRU for CRF Boathouse
ⁱ Only include rack rent for SARA shells
‡ Includes Repair, Purchases & Depreciation

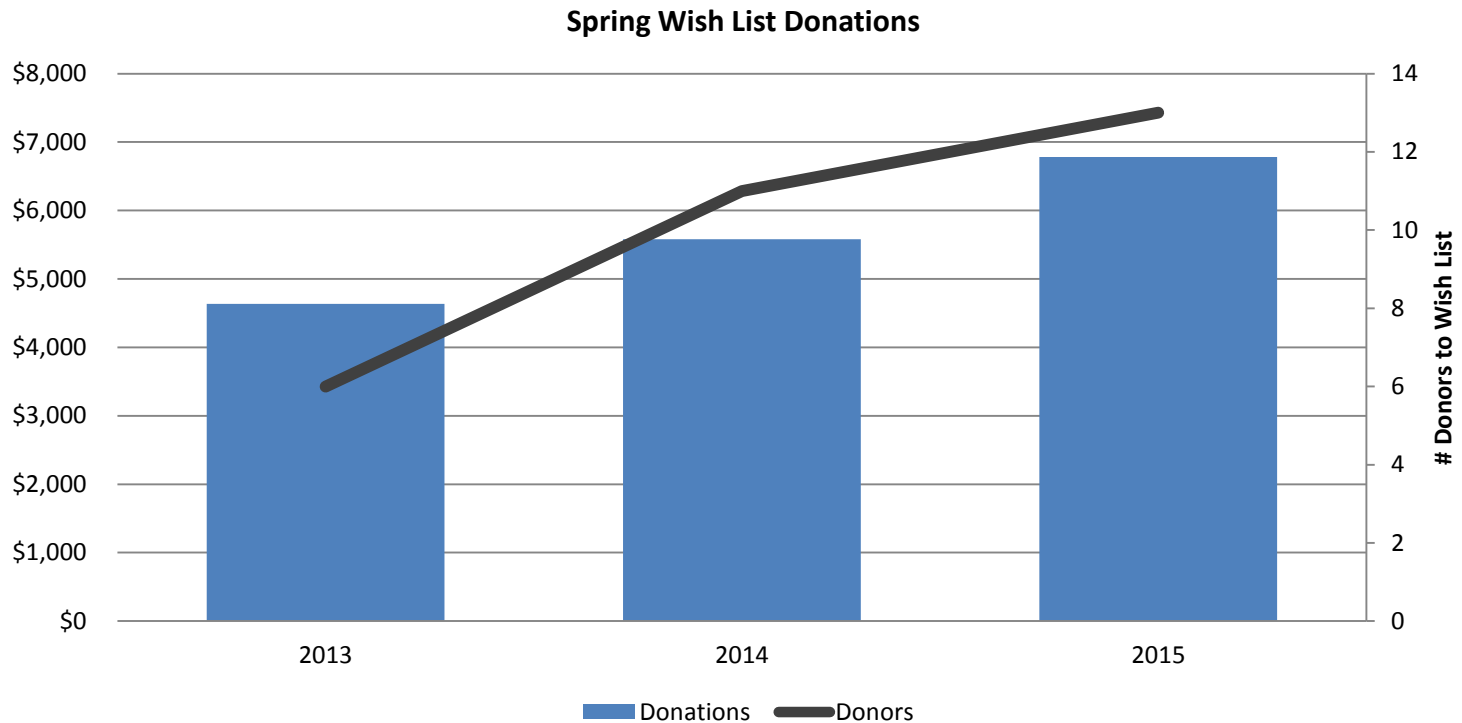
Cash on Hand: \$14,811

Does not include CWRU funds: Sports Club Budget and SARA Endowment





Wish List Trends



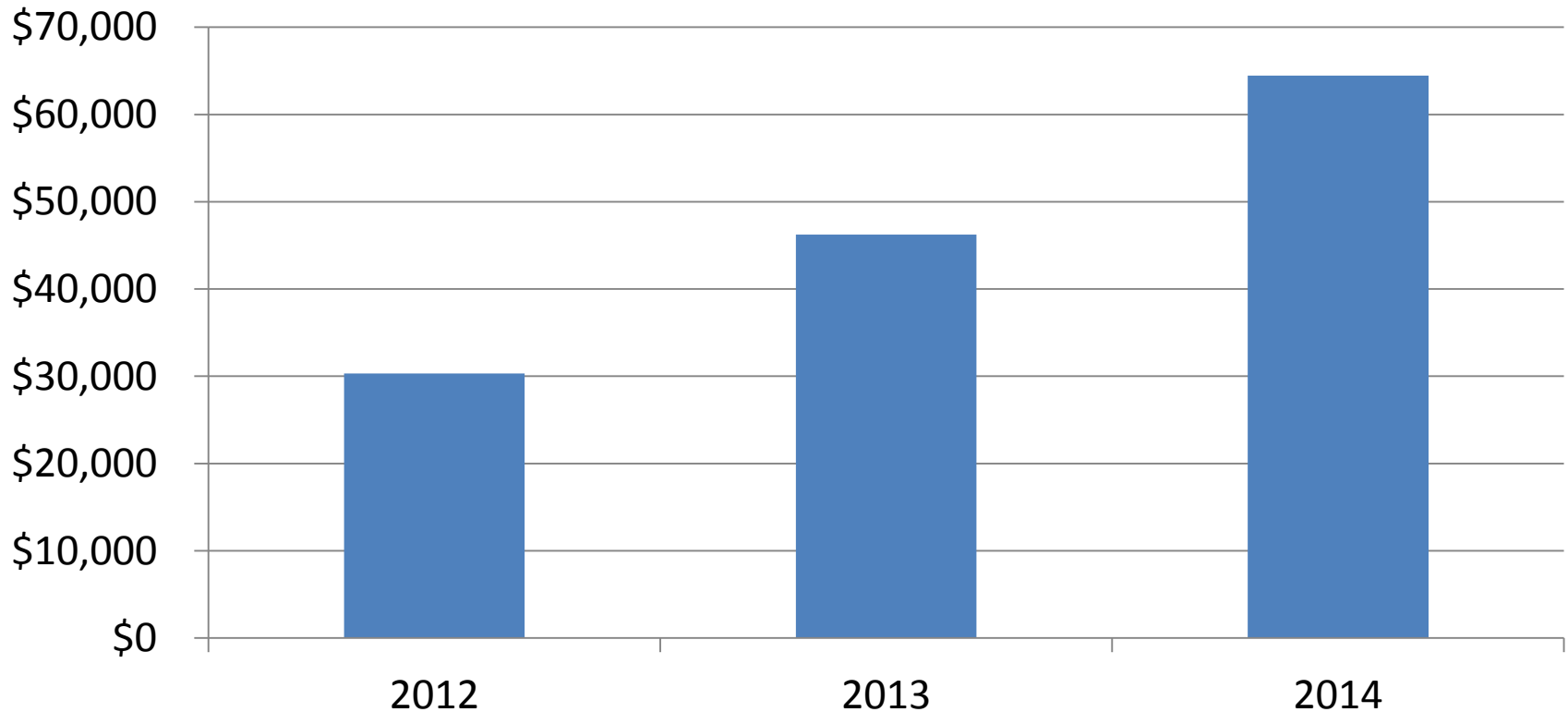
Coaching Makes the Difference

- Michigan vs. Ohio State (*WolverBuck: 19-2*)
- UVa
- Bucknell
- Purdue
- GVSU

“If Princeton can have it, why can’t we?”

Endowment Progress

SARA Coaching Endowment
(June 30 close)



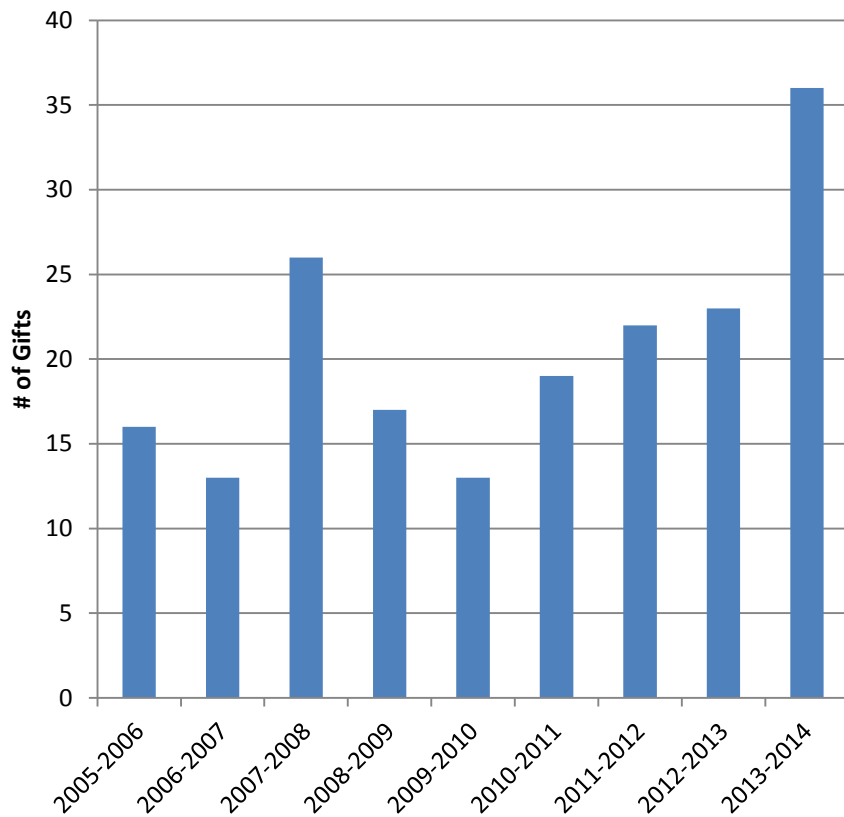
How Endowments Work



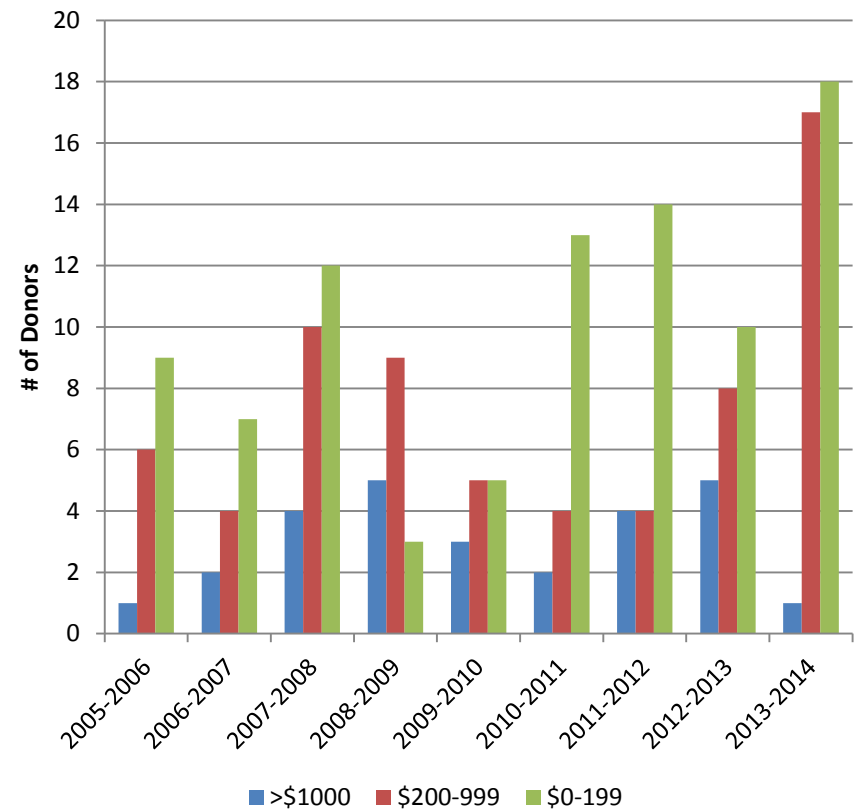
- Funds reside within larger endowment fund – like owning a portion of a large mutual fund
- Goal is to provide steady distributions and principal growth
- Minimum gifts required - \$25k
- Way to leave a permanent legacy – restricted, named funds
- Those with means generally have to give something...

Donor Participation

Total Number of Gifts



Donations by Giving Level



Where We Need Help

Building Championship Teams



A New Campaign Needed?

- Boats: 8+ & 4+
- Truck
- Coaching Endowment

Effective Donations

- Cash
- Long-term appreciated securities (stocks, bonds, mutual funds, etc.)
 - Directly donate appreciated stocks
 - Charitable write off equal to market value
 - Avoids paying tax on capital gains
- Life Insurance
 - Fund a life insurance policy with school as beneficiary
 - Funding payments (5 or 7 annual payments) tax deductible in year payment made
 - Policy pays out to university upon your death to the area you designate

Give Stock, Not Cash... We'll Take Cash Too!

One of the most tax-efficient ways to give

	Donate Stock: Contribute securities directly to charity	Donate Cash: Sell securities and donate proceeds
Current fair market value of securities	\$50,000	\$50,000
Capital gains and Medicare surtax paid ² (23.8%)	\$0	\$7,140
Charitable Contribution/Charitable Deduction ³	\$50,000	\$42,860
Value of Charitable Deduction Less Capital Gain Taxes Paid ² (Assumes donor is in the 39.6% federal income tax bracket)	\$19,800	\$9,833

- Any long-term appreciated securities with unrealized gains (meaning they were purchased over a year ago, and have a current value greater than their original cost) may be donated to a public charity and a tax deduction taken for *the full fair market value of the securities* — up to 30% of the donor's adjusted gross income.
- Since the securities are donated rather than sold, *capital gains taxes from selling the securities no longer apply*. The more appreciation the securities have, the greater the tax savings will be.

Giving: Life Insurance

A life insurance policy is an excellent way to make a gift to CWRU

Example:

- 40-year old male non-smoker
- 7 annual payments of ~\$2000
- Gift of \$2000 claimed as part of itemized deductions in year of gift
- \$100,000 paid to university upon your death

Inclusion in University's Luminary Society

- For alumni and friends who have made provisions for the future of the university through a planned gift

New Policy: How It Works

- Perhaps you don't own an existing policy but recognize the advantages of gifting a new life insurance policy.
- You can, in most states, purchase a new policy and name CWRU as the beneficiary and owner of the policy.
- Rather than paying premiums to the insurance company, you make tax-deductible contributions to CWRU to cover the premium payments.
- Even greater leverage (lower premium costs or increased benefit amount) is possible when two donors, typically spouses, purchase a two life survivorship policy.

<http://case.giftlegacy.com/?pageID=138>

List of Donors 2014

- Olympian (>\$2,500)
 - Doug & Erynn Rathburn
- Champion (\$1000-2499)
 - Carol Brubaker
 - Dad Vail Regatta
- Gold Medal (\$500-999)
 - Tom Attenweiler & Meg Grady
 - Cindy Ching
- Silver Medal (\$200-499)
 - Boston Scientific (Meg Grow)
 - Evan & Brandy Halprin
 - Elizabeth Kennedy
 - Mike & Trisha Krofcheck
 - Dick Sevier
 - Amy Kozlowski Treat
 - Nathan Uber
- Bronze Medal (\$1-199)
 - Anonymous
 - Dan & Gina Bachmann
 - Lauren Boucher
 - Joseph Butz
 - Jeff Chin
 - Miranda Cullins
 - Lori Egitto
 - William Giles
 - Jason Kampmeyer
 - Nina Ma
 - Tim Marcovy
 - MemOARies
 - Masaru Miyagi
 - Katie Puttmann
 - Kein Roberts
 - Nancy Ross
 - Mark Schoenenberger & Stacie Ringleb
 - Deb Stoll
 - Patty Travis

THANK YOU!

The logo for the Spartan Alumni Rowing Association (SARA) features the word "SARA" in a large, bold, sans-serif font. A rowing oar is positioned horizontally across the middle of the letters, with the blade pointing to the right.

What's Next

25th Anniversary Banquet



Case Crew History

