



**President**  
Suzan Shierholz  
**Vice President**  
Frankee Oleson  
**Treasurer**  
Don Erickson  
**Secretary**  
Peg Uthe

### **Board of Directors**

**Don Erickson**  
Ames  
**Dan Gonnerman**  
Huxley  
**Vern Hawkins**  
Ames  
**Dale Henricks**  
Story City  
**Phyllis Lepke**  
Story City  
**Barb McBreen**  
Cambridge  
**Katy McKinney**  
Colo  
**John Middents**  
Ames  
**Don Toms**  
Nevada  
**Frankee Oleson**  
Ames  
**Gretta Reischauer**  
Zearing  
**Charlie Ricketts**  
Ames  
**Suzan Shierholz**  
Ames  
**Peggy Uthe**  
Gilbert  
**Laura West**  
Nevada

Title: **It's All About One On One**

Foundation: Story County Community Foundation

Contact: Suzan Shierholz

Phone: 515-232-5445

Email: [storycounty@mchsi.com](mailto:storycounty@mchsi.com)

After a series of mailings to our county professional advisors, we realized that there was still little understanding of the Story County Community Foundation as well as the Endow Iowa Tax Credits. After many committee meetings, we decided on an approach:

1. to create a packet given the professional advisor at a personal meeting

This folder contains our foundation brochures, tax credit information, bequest language suggestions, board of directors information, information about our funds, etc.

2. to set up as many individual meetings with professional advisors as possible

We invited the PA to lunch or met with them at their office. As a result of the very first meeting with a lawyer, she called me to request I meet with a client whom she felt was a good match for our foundation. This client has now named the Story County Community Foundation in their will.

The SCCF is now the benefactor for two planned gifts we know about.

3. to host a professional advisors seminar

We provided continuing education credits for legal, insurance and accounting fields. We contracted with Johni Hays of the Stelter Group as the instructor. There were nineteen registrants for the seminar

4. to develop a detailed database for our professional advisors

We went through the phone book for the county and put all professional advisors on a database and have begun to track any information we gather about them; i.e., their level of knowledge about the foundation and their interest and their email address.

5. to create an email database of professional advisors willing to receive occasional updates from us as we learn of legislative issues or have information about the foundation to share

We now have forty advisors who have agreed to receive emailed information.