



'Reasons' for Giving Back

Professional advisors play a critical role in connecting donors to planned giving vehicles that allow them to impact their favorite charitable causes forever. Although making a difference with a “tomorrow gift” can be as easy as adding the name of an organization to the beneficiaries listed on an insurance policy or retirement plan, some gift arrangements require the assistance of an attorney or wealth management advisor. With their help, charitable organizations can be beneficiaries of a percentage of one’s estate through a will or revocable trust, and if the gift endowed, can make a difference for all time.

As is the case of now retired attorney Roger Reason, a professional advisor may well set the example of how one can perpetuate their generosity through endowment. As one of the few estate planners in the community in Hancock County Community Foundation’s (HCCF) infancy in the early 90’s, Mr. Reason picked up on his clients’ interests in leaving

charitable legacies. He shared the mission of the community foundation to enrich and enhance life by connecting donors with causes they care about and how the creation of an endowment (permanent fund) can perpetuate one’s generosity beyond their lifetime. “I became passionate about the idea,” Roger states. “Working with such incredible people, fellow board members, staff, and most importantly compassionate donors provided a wonderful opportunity in my life for which I will always be grateful.”

In addition to talking the talk, the Reason Family walked the walk with the establishment of the W. H. and Lola Reason Endowment for Patriotism Fund in November, 1999. Roger’s father served in the U. S. Army during World War II as a part of Battery C, 756th Field Artillery Battalion. He risked his life in the Southwest Pacific invasions of Luzon, Philippines, on January 9, 1945, and New Guinea, on his way to invading the Empire of Japan. To honor his service, Roger penned the fund agreement himself within an hour of his father’s passing. The fund, known as a field-of-interest fund, has provided grants to the American Military Heritage Foundation and Welcome Home Vietnam Veterans, Inc.

Roger established his second fund with wife Beverly in 2016 after realizing the detrimental impact of food insecurity on families. “Our eyes were opened when we began attending a small United Methodist Church in Palmetto, Florida. This church supports a robust food pantry that serves as many as 130 new families each month. We were stunned. No one should be deprived of proper and adequate nourishment.” After several phone calls to Hancock County pantries to attain a better understanding of local need, the Reason’s established the Roger D. and Beverly J. Reason Charitable Endowment Fund. Upon maturity through a planned gift provision, the fund will provide financial support to nourishment-

providing agencies through a grant application process. “The county was good to both of us,” Beverly concludes. “We moved to Florida in December 2014, but our hearts will forever belong to Hancock County.”

Before making a commitment to charity through a planned gift, HCCF recommends that one review their personal situation with a professional advisor. Should generous people find it appropriate to give perpetually, they may consider doing so by giving through a fund established at the Community Foundation. HCCF is committed to providing careful stewardship and proper administration on behalf of donors whether their favorite cause be within Hancock County borders or beyond. A list of the 270 funds that make up HCCF’s \$32 million dollar endowment can be found at www.givehcgrowhc.org.