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**MISSION STATEMENT**

Froedtert Menomonee Falls Hospital Foundation promotes and enhances the health of all individuals in our community through the development and management of resources in collaboration with the mission of Froedtert Menomonee Falls Hospital.

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**Dear Foundation Friends,**

I am honored to serve as the Executive Director for Froedtert Menomonee Falls Hospital Foundation. I am fortunate to be surrounded by an experienced and dynamic team and look forward to contributing to the continued success of the Foundation.

With a background in fundraising and donor development for almost 30 years, I bring a unique perspective and valuable knowledge to this role. I have been with the Froedtert health system for 15 years, serving as Director of the Foundation and Volunteer Services for Froedtert West Bend Hospital. Prior to joining Froedtert, I spent 14 years at the University of Wisconsin Carbone Cancer Center located in Madison. While there, I was able to deepen my experience in fundraising and donor development and I closed out my career as a development program manager working with cancer clinicians, researchers, grateful patients, donors, and a board of directors raising money for cancer research.

In my role with the Menomonee Falls Foundation, I will continue to lead the successful fundraising efforts already in place and I look forward to being directly involved with donor stewardship. I am excited about developing new relationships, deepening current ones, and collaborating more closely with our amazing donors, grateful patients, family members and the community. My focus will be on providing strategic insight that will continue to strengthen the financial resources of the Foundation, directly impacting our patients and the dedicated health care physicians, providers, and staff in their roles.

In this issue, we are excited to share a recap of our annual Spring Splendor Gala, themed "Rhythm of the Night," held in April. We also celebrated the 25th Anniversary of the annual Golf Classic in June with a sold-out event.

Our annual scholarship program reached a major milestone as we awarded $100,100 in scholarships to local high school students, college students and hospital staff advancing their academic degrees. These awards are possible because of our generous donors and the Foundation Board of Directors. Looking ahead to the fall, the Foundation will celebrate 35 years of providing financial resources in support of Froedtert Menomonee Falls Hospital and the patients we have the privilege to care for.

I look forward to the relationships and opportunities that lie ahead as I remain committed to contributing to our collective success.

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**ANN JOHNSON**

Executive Director

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**FROEDTERT MENOMONEE FALLS HOSPITAL FOUNDATION**

**MISSION STATEMENT**

Froedtert Menomonee Falls Hospital Foundation promotes and enhances the health of all individuals in our community through the development and management of resources in collaboration with the mission of Froedtert Menomonee Falls Hospital.
Cash is not always king, especially when donating to charity. As you start planning for your year-end gifting, take time to understand what options are available to you, and compare outcomes including the tax implications.

Maximize your donations while minimizing the impact on your wallet. Families that want to make the most of their donations should talk to their financial or tax professional about how to stretch their dollars in tax-efficient ways. Below are three popular tax-efficient strategies to consider, whose benefits vary depending on the taxpayer’s age and income level.

QUALIFIED CHARITABLE DISTRIBUTIONS (QCD)

A QCD is a distribution from an IRA paid directly to a qualified charity. Unlike taking an IRA distribution and then donating cash, a QCD does not count as income on your tax return keeping your aggregate gross income (AGI) lower. This provides more potential benefits such as (i) a lower taxable portion of Social Security benefits, (ii) a lower threshold for deducting medical expenses and other itemized deductions, and (iii) less income applicable to Medicare Premium surcharges (i.e., IRMAA) and the 3.8% Net Investment Income surcharge. The QCD can also count towards your Required Minimum Distributions (RMD). If you already took your RMD, that’s not a problem. You can still make a QCD to your favorite charities.

QCDs have continued to gain popularity since becoming permanent in 2015; however, they do have limitations. You may make QCDs only if you are age 70.5 or older on the day of distribution and QCDs continue to be ineligible for donation to donor-advised funds, private foundations or supporting organizations.

New laws have expanded the rules for QCDs allowing donors to make a one-time election of up to $50,000 to fund certain charitable trusts or charitable gift annuities. Finally, while QCDs were previously limited to $100,000 per year, the limit is now indexed to inflation. In 2024, the QCD limit has increased to $105,000.

DONATE APPRECIATED ASSETS

When you gift long-held appreciated assets to a charity, you can receive a charitable deduction for the market value of your donation, and you do not realize the capital gains since you did not sell the asset. For those with large unrealized capital gains, this can be a great option. Commonly gifted assets include securities and real estate.

In the case of securities, you send the securities directly from your account to the charity. Be careful, however, as many charities do not accept certain types of assets. You should coordinate with the charity in advance as sometimes the hassle of selling an asset can outweigh the benefit of the gift.

DONOR- ADVISED FUNDS

This option is also becoming more popular. Instead of donating cash or securities directly to a charity, they can be donated to a Donor-Advised Fund (DAF).

This allows you to receive a tax deduction in the year of the donation and retain some control over the assets donated. Typically, a mutual fund family or brokerage firm can provide access to a foundation that receives your donation and acts like an escrow account. This account holds the donated assets until you decide when and to whom to send those funds. The tax-deduction comes in the year contributions are made to the DAF, not when distributed from the DAF to qualified charities.

If you have had an especially fortunate year, are looking for a larger tax deduction than usual, or would like to spread out the timing of your charitable gifts, DAFs are a wonderful solution. This strategy is common for business owners experiencing large capital gains from a business sale.
RHYTHM OF THE NIGHT SETS THE TONE FOR SUCCESSFUL EVENT

The 31st Annual Spring Splendor Gala presented by Ryan Companies US, Inc. on April 19 brought together nearly 250 guests who participated in raffles and silent and live auctions and raised $157,000 for Froedtert Menomonee Falls Hospital.

Event proceeds will support the creation of a new Heart and Vascular Services classroom and teaching kitchen. Once completed patients will learn how to shop for heart-healthy foods and how to prepare healthy meals at home. The space will also accommodate community education opportunities for local residents who are working toward improving their heart health.

Heart disease is the leading cause of death for men and women in the United States.

Co-chairs Debbie and Jerry Wick offered an emotional testimony how doctors and medical professionals from Froedtert Menomonee Falls Hospital saved Jerry’s life in 2012. After playing a round of golf and cutting the lawn, Jerry went into cardiac arrest. A short time after arriving at the Emergency Department and being diagnosed with three serious blockages in his heart arteries, he was headed to the operating room for open heart bypass surgery.

After being discharged Jerry started slowly exercising to gain strength. “I remember walking up and down our hallway. I graduated to part way down the drive, then to the end of the cul-de-sac, then around the block. I was so tired that I needed to nap after each walk.”

He also went through cardiac care rehabilitation where he worked to keep his heart in good shape.

“The staff encouraged me to keep working and safely increase my stamina. Those nurses and techs deserve a lot of recognition and praise because they have a big responsibility taking care of so many heart patients,” Jerry said.
MARK YOUR CALENDAR FOR THE 2025 SPRING SPLENDOR GALA:
FRIDAY, APRIL 11

Co-chairs Debbie and Jerry Wick

Gala emcee Gerron Jordan, WISN 12 News Anchor/Reporter

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Bob and Susan Soerens
It was a near perfect day on the links at North Hills Country Club as golfers came together for their favorite pastime while also raising money for Heart and Vascular Services at Froedtert Menomonee Falls Hospital.

Anchored by presenting sponsor Weas Development, the Golf Classic raised more than $90,000. This marks Weas Development’s 13th consecutive year as presenting sponsor.

Golfers reminisced about the number of years they’ve participated in the popular event which started in 1999 and has brought together thousands of hospital supporters and golf enthusiasts. The outing is a treat for many who run into colleagues and friends on the course.

Proceeds from the Golf Classic total over $1.7 million from the last 25 years and the impact of those dollars is spread across many hospital departments and service lines, including the Emergency Department, Surgery Services, Cancer Center and Heart and Vascular Services.
When Foundation board member Dan Hart and then-Community Memorial Hospital leader John Zorbini and staff member Paul Palesse came up with the idea for the Golf Classic, they had immediate buy-in from the Foundation board, hospital board and the executive team.

“We wanted to create a first-class event,” recalls Zorbini. “After a year of planning by a dedicated committee, we hosted the first event at Black Wolf Run in Kohler. It was an immediate success. Over the next nine years that I co-chaired the event, it was held at Geneva National Golf Club in Lake Geneva. With three courses to choose from (Player, Trevino and Palmer) we rotated the courses every three years.”

The event moved to North Hills Country Club in Menomonee Falls in 2017.

Dan adds, “We’ve had the benefit of holding this fundraiser at spectacular locations for 25 years. I’m most proud of the money that has been raised and the fun that has been had by all who participated.”

John says the Golf Classic worked on all levels with players, sponsors and volunteers. “We had more volunteers than we ever needed but always accepted all who wanted to give back to the hospital by helping. We raised a lot of money for many clinical services at the hospital and they were appreciative of our efforts.”

For the last 25 years, this has been the premier golf event of the season in our area and it continues to sell out every year.

John Zorbini, Golf Classic Co-Founder

THANK YOU TO PATRONS AND DONORS WHO HAVE GENEROUSLY SUPPORTED THE GOLF CLASSIC EACH YEAR SINCE ITS INCEPTION.

Dick and Jayne Becker
Rick Binzak
Jerry and Sharon Ellis
Jim and Beth Hampton

Dan Hart and Carrie Fitzgerald Hart
Dennis Pollard
Dr. Gregory and Mariann Van Winkle
von Briesen & Roper, s.c.
Froedtert Menomonee Falls Hospital Foundation hit a milestone this year by awarding $100,100 toward the educational pursuits of future health care professionals. The investment underscores the foundation’s belief of supporting local students and current hospital staff members as they advance their careers and academic endeavors.

A total of 27 students studying health science and health career degrees were given the financial support from Froedtert Menomonee Falls Hospital and the Foundation.

The hospital and foundation have handed out scholarships to local students and hospital staff members for 54 years. Some recipients are at the beginning stages of their careers while others are taking the next step to deepen their knowledge in order to better perform their job and serve in leadership positions.

Nearly $1.5 million has been awarded to about 530 recipients since 1970.

APPLICATIONS FOR THE 2025 SCHOLARSHIP AWARDS OPEN ON DEC. 1, 2024. FOR MORE INFORMATION, VISIT WWW.FROEDTERT.COM/MENOMONEEFALLSFUNDATION/SCHOLARSHIP

APPLAUSE FOR THE 2024 RECIPIENTS!

Ciara Ayala
Calvin Dassow
Paula Delgado
Michelle Dorow
Johannes Ferdaus
Sierra Hoefs
Mary Jane Juern
Hannah Kaker
Gabriella Keidl

Katherine McCabe
Michelle Snow
Gennesis Valle
Emma Nell
Amaia Magee
Alexandra Ninu
Cordero McCall
Peyton Toepfer
Kaelyn Richmond

Mckenna Kane
Kelci Wunschel
Isabella Prochazka
Noel Barger
Aidan Konop
Ashley Wittmann
Viviana Bojorquez
Calista Johnson
Angela Hayner
**DONORS RECOGNIZE STUDENTS WITH SPECIAL SCHOLARSHIPS**

The Foundation awarded 14 named scholarships to students and Froedtert Health staff members. Some scholarships are from families who established the awards in honor of their parents or loved ones.

<table>
<thead>
<tr>
<th>Scholarship</th>
<th>Recipient</th>
<th>School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rick Binzak Community Service Scholarship</td>
<td><strong>Emma Nell</strong>, nursing</td>
<td>Carroll University</td>
</tr>
<tr>
<td>Robert &amp; Lydia Charlebois Scholarship</td>
<td><strong>Amaia Magee</strong>, nursing</td>
<td>Marquette University</td>
</tr>
<tr>
<td>Donald &amp; Carol Dati Family Scholarship</td>
<td><strong>Alexandra Ninu</strong>, nursing</td>
<td>Marquette University</td>
</tr>
<tr>
<td>Rochell M. Davis Scholarship</td>
<td><strong>Cordero McCall</strong>, orthopedic surgery</td>
<td>Medical College of Wisconsin</td>
</tr>
<tr>
<td>Richard J. Freiberg Memorial Scholarship</td>
<td><strong>Peyton Toepfer</strong>, biomedical sciences</td>
<td>Marquette University</td>
</tr>
<tr>
<td>Ruth and Robert Holming Memorial Scholarship</td>
<td><strong>Kaelyn Richmond</strong>, nursing</td>
<td>University of Wisconsin–Madison</td>
</tr>
<tr>
<td>Jackie Irwin Scholarship</td>
<td><strong>Mckenna Kane</strong>, nursing</td>
<td>University of Wisconsin–Oshkosh</td>
</tr>
<tr>
<td>Gladys Joecks Memorial Scholarship</td>
<td><strong>Kelci Wunschel</strong>, nursing</td>
<td>Illinois State University</td>
</tr>
<tr>
<td>Komas Family Nursing Scholarship</td>
<td><strong>Isabella Prochazka</strong>, nursing</td>
<td>University of Wisconsin–Eau Claire</td>
</tr>
<tr>
<td>Medical Staff Scholarship</td>
<td><strong>Noel Barger</strong>, biochemistry/pre-med <strong>Aidan Konop</strong>, biology/pre-med</td>
<td>University of Wisconsin–Madison University of Wisconsin–Madison</td>
</tr>
<tr>
<td>Pamela Parker Scholarship</td>
<td><strong>Ashley Wittman</strong>, nursing</td>
<td>Maryville University</td>
</tr>
<tr>
<td>Poehl Family Scholarship</td>
<td><strong>Viviana Bojorquez</strong>, nursing</td>
<td>Grand Canyon University</td>
</tr>
<tr>
<td>Dennis M. Pollard Physical Therapy Scholarship</td>
<td><strong>Calista Johnson</strong>, exercise physiology</td>
<td>Marquette University</td>
</tr>
<tr>
<td>Marguerite Preuss Scholarship</td>
<td><strong>Angela Hayner</strong>, pharmacy</td>
<td>Concordia University</td>
</tr>
</tbody>
</table>

**READ ABOUT THE NAMED SCHOLARSHIPS AT**
FROEDTERT.COM/MENOMONEEFALLSFoundation/SCHOLARSHIP
Donald and Carol Dati, born to immigrant Italian families, were role models in giving back to the community as they volunteered at their parishes, coached their kids’ sports teams and selflessly served other civic groups.

“Our parents were always there for us and supported us through every stage of our lives,” says daughter Janine Baudhuin. “They enrolled us in Catholic education, supported our marriages and our families.”

Donald and Carol passed away within 14 months of each other – Carol in 2021 and Donald in 2022. As their four children, eleven grandchildren and 16 great-grandchildren remember their legacies, the family has established a scholarship in honor of the couple.

“We understand the importance and critical roles nurses have in patients’ lives,” says Gregg Dati, who along with Janine, brother Brian Dati and sister Cheryl Neder support the Donald and Carol Dati Family Scholarship through Froedtert Menomonee Falls Hospital Foundation. “Given the critical need of nurses we felt it would be a real tangible method of giving some of mom and dad’s financial blessings to individuals needing assistance to help achieve their education goals.”

This year’s recipient, Alexandra Ninu, is a nursing student at Marquette University.

Married for 63 years, the Datis worked hard as they raised their family: Donald in heating, ventilation and air conditioning for St. Luke’s Hospital and Carol in bill processing for Wisconsin Gas Company. They retired in 2004.

Carol enjoyed sewing and cooking, served as an election poll worker and counted collections at Saints Peter and Paul Parish on the eastside and St. Dominic’s in Brookfield. Donald was a handyman who could fix anything.

“They came from nothing and made a home with four kids,” Gregg recalls. “They are part of the generation that knew how to save money and passed on that philosophy. They would be happy and proud that we are helping others.”

Carol was diagnosed with cancer in 2009 and received medical care and treatments at Froedtert Menomonee Falls Hospital and Froedtert Hospital. Later in life, the couple lived in The Arboretum Senior Community in Menomonee Falls.

“Honestly, our parents knew they needed assistance and the certified nursing assistants and nurses who cared for them were angels,” Janine says. “As their children, we watched closely and made sure the staff was attentive to their needs. We always felt they were in good care.”

Supporting nurses through the scholarship was a natural choice.

“The desire to be a nurse, to display compassion and help others in need is a special gift,” Janine adds. “The scholarship is very important as schooling has become expensive and sometimes not possible for certain individuals.”

Gregg recommends that families looking for an appropriate way to honor a loved one should consider establishing a scholarship.

“If your heart believes it’s the right thing to do, then give what you can to financially help anyone who could use this valuable resource,” he adds.
Dr. Gregory Van Winkle

This spring Dr. Gregory Van Winkle wrapped up 17 years of service on the Froedtert Menomonee Falls Hospital Foundation Board of Directors, a point of pride and achievement for the retired orthopedic surgeon who has spent a majority of his career at the hospital.

Volunteering for a cause you believe in is always the right thing to do, Dr. Van Winkle offers. “We have a world-class facility with top notch staff in a community hospital setting. That combination is truly unique,” says Dr. Van Winkle, who currently oversees patient safety and utilization management with the hospital and is also an emeritus member of the Medical Staff and a medical director.

Dr. Van Winkle and his wife Mariann, who also graciously donates her time to the Community Outreach Health Clinic and many Foundation events, have supported the Foundation every year since it was founded in 1989.

They were honored with the Philanthropy Excellence Award in 2017 which recognizes individuals who demonstrate consistent and exceptional level of generosity through volunteerism and donations, improve the quality of life for people across the community and strengthen relationships between the hospital and other community partners.

Among Dr. Van Winkle’s favorite Foundation memories is chairing the 2013 Spring Splendor Gala at Miller Park with Mariann, which benefitted the Emergency Department expansion.

“There is no better way to support the health and well-being of our community than by supporting the Foundation,” he said. “The Foundation has done tremendous work in support of the hospital, especially in tough times as we’ve just been through.”

The Van Winkles are members of the Evergreen Society as they have included the Foundation in their estate planning.

Outside of the Foundation, Dr. Van Winkle and Mariann are involved with their church and mission trips to Piura, Peru to provide medical care to residents.

Sharon Ellis

In 1990, Sharon was tapped by former hospital board member Dick Becker to join the then-Community Memorial Foundation Board of Directors. The Foundation was only a year old.

She delved into every area of the Foundation and served on many standing committees, including executive, scholarship, major gifts, the Golf Classic and allocations (which reviews funding proposals of new equipment and programs from individual departments to the Foundation). She served as board chair from 2015 to 2020.

“The culture of the Foundation and the culture of the hospital is at its core all about the people and all about the community,” says Sharon, a business and interpersonal communications consultant.

The longtime Menomonee Falls resident never shies away from an opportunity to spread the message about the exceptional care her family has received from dedicated health care workers.


Sharon and Jerry are Evergreen Society members because supporting the hospital with a final, legacy contribution “is the logical and the right thing to do” after supporting the Foundation for decades.

After an amazing 30-year run on the board, Sharon retired in 2020. This summer she was presented with a tribute rock in the hospital’s Healing Garden, honoring her leadership and commitment as chair of the board.

James Hazzard

James Hazzard is the longest serving member on the Froedtert Menomonee Falls Hospital Foundation board, a role he assumed in 1989 when the Foundation was chartered. He retired from the board in 2022.

Earlier this year, the gathering space in the Foundation office was named the James C. Hazzard Conference Room in his honor.

For three decades Jim was a guiding and stable force, offering wit and wisdom as the board supported the hospital and enhanced patient care and comfort.

“The hospital is a tremendous asset and provides superior care to the Menomonee Falls community,” says Jim, who also served as board chair from 1991 to 1997.

Jim served on the allocations committee and the major gifts task force.

Jim and his wife Cathy, also an ardent Foundation supporter, are members of the Evergreen Society, including the Foundation in their estate planning.

Jim and Cathy have attended nearly every Spring Splendor Gala, a Foundation tradition and signature fundraising event, since 1990. They co-chaired the event in 2023.

Among Jim’s favorite memories is being part of the Cancer Center Capital Campaign in the 1990s and seeing the Foundation endowment grow “to a level I would not have originally thought possible.”

Jim wants everyone to know that funds raised by the Foundation remain in our hospital in Menomonee Falls. “It’s truly local.”
Six Decades
CARING FOR THE COMMUNITY

In honor of Froedtert Menomonee Falls Hospital’s 60th Anniversary, consider the following ways to support our beloved hospital:

- **Donate to the department of your choice.** Every single gift makes a difference in the lives of our patients.
- **Make a tribute or memorial gift.** In memory of a loved one or friend.
- **Show gratitude and appreciation.** To a healthcare professional for the care you or a family member received.
- **Focus on tax planning.** Benefits and give through a Required Minimum Distribution or Qualified Charitable Distribution.

For more information, visit Froedtert.com/MenomoneeFallsFoundation

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