

# Annual Report 2013



NORTHWEST  
FEDERAL CREDIT UNION  
FOUNDATION

# Thank You for Helping Us Help Our Kids

Children danced the night away at NWFCU Foundation's Night of Magic, a fun and festive ball held for past and present patients at Inova Children's Hospital. ▼



Northwest Federal Vice President of Marketing Karlye Thornton carries toy donations for NWFCU Foundation's annual toy drive benefiting children in the branch communities.



Northwest Federal Loan Officer Patricia D'Souza spends time with a Dranesville elementary student as part of NWFCU Foundation's mentoring program.

NWFCU Foundation Executive Director Linda Rogus and a Children's National Medical Center patient decorate a piggy bank as part of the annual Credit Union Miracle Day celebrations. ▶



Northwest Federal Mortgage Loan Administrator Wakim Brice-Robinson works with a group of high school seniors as part of NWFCU Foundation's Reality Store, a role-playing experience designed to help high school students understand and plan for expenses of everyday life. ▶



# Report from the Chairman and Executive Director

## Help Us Help Our Kids

We would like to thank all of you—our remarkable donors and volunteers—for your loyalty and continued dedicated support of our Northwest Federal Credit Union Foundation. We would also like to thank our Board of Directors and Northwest Federal Credit Union employees for their ongoing passionate efforts to ensure that our organization continues to make a difference in the lives of those we help now and in the future.

Thanks to the contributions of many talented volunteers and the support of you—our donors—there is much progress to report in 2013, a breakthrough year for our Foundation. In order to meet our goal to build an organization that will survive and thrive for generations of members to come, we added \$180,000 to our endowment fund bringing our total to date to over \$344,000. By adding to this fund in future years we will continue to strengthen our financial footing.

While preparing for the future, we continued to contribute and strengthen our community daily through our scholarship, mentoring and youth outreach programs. In 2013 we awarded twenty Ben DeFelice scholarships totaling \$100,000 and our charitable contributions totaled over \$38,000 to help our communities in countless ways locally, including over \$11,000 to Children's Miracle Network to benefit our regional Children's National Medical Center in Washington, DC. In partnership with Northwest Federal Credit Union, we extended disaster recovery aid to our global neighbors in the Philippines through a \$10,453 donation to Doctors Without Borders/Médecins Sans Frontières in the wake of the devastation of Typhoon Haiyan.

Together we donated thousands of volunteer hours and raised money to benefit technology initiatives and staff development for local schools. Through our holiday food, toy, coat and Adopt a Family drives we delivered the magic of the season to local families through organizations like Northern Virginia Family Service and LINK, Inc. We continued to mentor students and fund a program at Dranesville Elementary in Herndon, VA to provide backpacks of food every weekend for students who otherwise might not have reliable access to food

outside of school—about 24% of the student body. Our employees delivered over 300 meals through our local Meals On Wheels program to senior citizens and adults with disabilities who cannot shop for or prepare their own meals.

In partnership with Inova Children's Hospital in Fairfax, VA we presented our Fourth Annual Night of Magic, an evening like no other for children battling chronic and sometimes life-threatening illnesses and their families. This is a magical night of dance, entertainment, dining, games and prizes that helps to take them away from their daily fears and worries. This is always one of our most memorable and rewarding events, one that our guests look forward to every year.

The year 2013 was another remarkable year, thanks to you, and once again proved that we work together better than we do individually.

We hope that we can count on you to continue to *Help Us Help Our Kids* in the years ahead.



Chris McDonald  
Chairman, Board of Directors



Linda Rogus  
Executive Director

Northwest Federal Credit Union President  
Chris McDonald and NWFCU Foundation  
Executive Director Linda Rogus present a  
check in the amount of \$10,453 to Doctors  
Without Borders to aid in relief efforts in the  
Philippines after Typhoon Haiyan.



# NWFCU Foundation Board of Directors and Executive Director



Back row, left to right:

**Gerianne Burks**  
*Vice Chairman*

**Chris McDonald**  
*Chairman*

**Juri Valdov**  
*Director*

Front row, left to right:

**Chuck Molina**  
*Director*

**Mary DeFelice**  
*Director*

**Linda Rogus**  
*Executive Director*

# Report from the Treasurer

## Statement of Financial Position

As of December 31, 2013

### ASSETS

Cash and cash equivalents	\$ 550,811
Accounts receivable – unrestricted	<u>24,808</u>
Total assets	<u>\$ 575,619</u>

### LIABILITIES AND NET ASSETS

#### Liabilities:

Total liabilities	<u>\$ 0</u>
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#### Net Assets:

Unrestricted funds	116,972
Restricted funds – Ben DeFelice	112,666
Restricted funds – CIRA	1,231
Endowment to restricted funds	<u>344,750</u>
Total net assets	<u>575,619</u>
Total liabilities and net assets	<u>\$ 575,619</u>



Northwest Federal employees posing in a pink heart formation during October's National Breast Cancer Awareness Month to show their heartfelt hope for a cure.

## Statement of Activities and Change in Net Assets

For the Twelve Months Ending December 31, 2013

### REVENUES

Contributions – individuals and corporations	\$ 297,037
Contributions – affiliated entities	61,303
Fundraising	<u>8,374</u>
Total revenues	<u>366,715</u>

### EXPENSES

Scholarships (Ben DeFelice)	100,000
Scholarships (CIRA)	15,000
Charitable contributions	54,845
Financial education expenses	6,434
Awards banquet expenses	<u>3,534</u>
Total expenses	<u>179,812</u>
Change in net assets	<u>186,902</u>
Total net assets at beginning of year	<u>388,717</u>
Total net assets at December 31, 2013	<u>\$ 575,619</u>

Northwest Federal Credit Union generously donates all salaries and administrative costs.

# NWFCU Foundation's Individual Donors of 2013

The following individuals generously donated during 2013.

## Leaders (\$1,000 or more)

Anonymous (2)  
William and Ethel Cook  
Mary Corrado  
Sue Davis  
Mary DeFelice  
Beverly Herrington  
Kristin Rogus  
Linda and David Rogus  
John Nelson  
Juri Valdov  
Catherine Van Gombos  
David E. Yager

### **Tributes:**

Gary E. Coene  
*In tribute to Annemarie Coene*

## Partners (\$500 to \$999)

Anonymous (2)  
Greg Gibson  
Faith Grant  
William Haggerty  
Dave and Donna Hartmann  
W. Daniel Hayden  
Sheila Hodges  
Robert H. Larson  
Chuck and Denise Molina  
Christopher McDonald  
Nicholas Miller  
Randy E. Nees  
Adrian C. Page  
Jana Solterbeck  
Pat Spann and Pat Squires

## Sponsors (\$250 to \$499)

Anonymous (3)  
Robert Y. Bigman  
Gerrienne and Gary Burks  
Milly Cramer  
Barbara d'Andrade  
Patricia D'Souza  
Heather Devers  
Paul Doran  
David Eldred  
Elizabeth and Warren Grasty  
Eileen Gray  
Chuck Griffith  
Erin Krause  
The Leewe Family  
Valerie Passwaiter  
Fred K. Schilling  
Jane Smeltzer

### **Memorials:**

Barbara L. Carr  
*In memory of Beryl Backman*  
Laura and Mark Dawson  
*In memory of Matt Dawson*  
Terence J. McGurn  
*In memory of Sally McGurn*  
The Taddeo Family  
*In memory of Mary and Ellen Ashton*

## Friends (\$100 to \$249)

Anonymous (6)  
James and Fatmi Anders  
Angela Armstead  
Claudette M. Avrakotos  
John and Marilyn Bissinger  
Bill and Jackie Blandford  
Scott and Wendy Boiles

Debbie Bradley  
Donna Bruce  
Dianne Burkett  
Robert B. Cantwell  
Ken Carlozzi  
Gary and Sandy Chase  
John and Norma Dadiani  
The Daly Family  
Ivan Danzig  
Robert C. Eaton  
Andres Esteban  
James A. Estep, Jr.  
Suzanna Famiglietti  
Katherine Forno  
Jennifer Gibson  
The Gilligan Family  
Russell Glick  
Wendy Golt  
James and Pat Griggs  
Joseph G. Giuliano  
Genevieve Gwei  
Kathryn Halpern  
Eric D. Henderson  
Joan and Jim Hirsch  
John Humphrey  
Baljit Kaur  
Brian and Verlinda Keith  
Jennifer Kelly  
Kermit and Janet Kidwell  
Sonya Kostan  
Jennifer Kostelnik  
David Kraus  
Janet E. Lendall  
Andrew Light  
Deborah S. Linton  
Robert and Suzanne Litviak  
Jory D. Luchsinger  
Scott M.

John and Kelly Marsh  
Harrison McAlpine, Jr.  
Julian C. Nall  
Bob Nolan  
James Northington  
Lester F. Penney  
Chris Perry  
Donna Peshoff  
Theodore C. Poling  
Barrie Robinson  
Arnold T. Rothenbuescher  
Jerry D. Rowzie, Jr.  
Mark Rumsey  
Winifred Silverson  
Dotty Olson Snyder  
Kellie L. Steger  
Donna Swann  
Shannon Tackett  
Joe Talmadge  
Christine A. Temple  
Michelle Thompson  
Joel Ticknor  
Tung Huu Tran  
LeVar Trice  
Gloria Weary  
Caroyn D. Whipple  
Phyllis Ziakas  
Mr. and Mrs. Zirkle

### **Memorials:**

Gregory L. Hekel  
*In memory of Col. Vincent Hekel*  
Michael Masakowski  
*In memory of Ken Wiedel*

# NWFCU Foundation's Corporate Donors of 2013

The following corporations, organizations and individuals generously donated during 2013.

## Leaders (\$10,000 or more)

Central Intelligence Retirees Association  
Financial Awareness Network  
Northwest Capital Management LLC  
Northwest Federal Credit Union

## Sponsors (\$1,000 to \$4,999)

American Express Foundation  
Clayco  
Credit Unions Care Foundation  
DigitalMailer, Inc.  
Financial Benefit Services, LLC  
Herndon High School students and staff  
Kevin Carter, RE/MAX Select Properties  
Nate Shapiro, John Evans, and  
Michael Gorman, The Corus Group  
of Long & Foster  
Northwest Title & Escrow

## Friends (\$250 to \$999)

Northwest Federal Credit Union:  
Call Center and Card Services Team  
Compliance and Risk  
Management Department  
Mortgage Department  
Ryan Appraisal Services  
Westfield Business Owners Association

## Contributors (\$100 to \$249)

Arturo Cruz, Jr., Keller Williams Realty  
ARH Team Keller Williams  
Brian Whritenour, Living Realty LLC  
Damian E. Buckley,  
Long & Foster Real Estate  
Jerry Rowzie, Keller Williams Realty  
Jimmy's Old Town Tavern  
Jobin Realty  
Northwest Federal Credit Union:  
Chantilly Branch  
Consumer Lending Department  
Gainesville Branch  
Headquarters Branch  
Herndon Branch  
IT Technical Support Team  
Marketing Department  
Records and Collections Team  
R. A. Rogers, Inc.  
Tah-Da! Inc.

## In Kind Donations

American Bride  
Best Bridal and Formal  
Carolina Brothers Pit Barbeque  
DigitalMailer, Inc.  
Dolce Vita Salon & Spa  
Electric Entertainment  
gam graphics and marketing  
Jimmy's Old Town Tavern  
Kitchen Gourmet &  
A Company of Caterers  
P. K. International  
Reel-n-Motion  
The Chocolate Chick of Herndon  
Washington National Opera  
Washington Nationals  
Washington Redskins  
Whysall Photography

## Matching Gifts

Many employers sponsor "Matching Gift" programs through which each donation made by an employee to NWFCU Foundation is matched by the employer making a donation in the same amount.

We would like to thank the following for support in 2013 through matching gifts:  
American Express Foundation

Sincere thanks to  
**Our Foundation Donors!**

Recipients of NWFCU Foundation's  
2013 Ben DeFelice Scholarship  
and CIRA Scholarship programs.



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[www.nwfcufoundation.org](http://www.nwfcufoundation.org)



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