



FREDERICA ACADEMY

2017-2018 Donor Appreciation Report







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A LETTER OF APPRECIATION FROM THE BOARD

Last year was the best operational fundraising year ever for Frederica Academy! This would not have been possible without the unconditional and generous support from all of you. We remain grateful for your time, talent, and treasure. You helped us end the year with an operating surplus—with fundraising providing nearly one-fourth of our operating revenue.

WE REMAIN GRATEFUL FOR YOUR TIME, TALENT, AND TREASURE. YOU HELPED US END THE YEAR WITH AN OPERATING SURPLUS—WITH FUNDRAISING PROVIDING NEARLY ONE-FOURTH OF OUR OPERATING REVENUE.

Independent schools are unique because they are truly a partnership between the school (administrators, faculty, and staff); the families who send their children to Frederica Academy (students and their parents); and the broader stakeholder community (trustees, Board of Visitors, alumni, alumni parents, former faculty and staff, grandparents, civic and business leaders, and local independent school enthusiasts) that collectively support the school's mission. This appreciation report details all the different ways that you have participated in building this support and enhancing the Frederica experience for our students.

Your investments yielded opportunities to train all of our Lower School teachers in Orton-Gillingham, teaching techniques that are applicable to all students as they learn to read; a new Lower School "Strings On" partnership with the Golden Isles Youth Orchestra; innovative Pre-Kindergarten indoor and outdoor learning and play centers; the introduction of a robotics program; the launch of a new Middle School Odyssey of the Mind program; a new Middle School band program; the Parker Speaker Series in the Upper School; an expanded AP portfolio; and many other significant investments that speak to the breadth of our mission to serve each student in mind, body, and spirit.

We were also able to invest in the long-term future of the school by allocating a portion of fundraising dollars to increase the value of our endowment and operating reserve as well as address important deferred maintenance and critical campus security projects. As the school approaches the 50th year since the founding of Frederica Academy, insuring the legacy of this school for the future remains a priority.

We have included pie charts in this report that demonstrate the breakdown of the school's financial model. Our net tuition covers only the salaries and benefits of our faculty and staff—about 72% of our operating revenue. Other costs including classroom instruction and experiential learning investments, technology, professional development, athletic and arts programs, and all of the expenses associated with maintaining our campus and physical plant are supported through non-tuition revenue.

Also contributing to the financial success for this year is the focus by school leadership on operational efficiency and careful attention to all expenditures. Please know that we take all tuition and non-tuition commitments very seriously and provide the utmost care in the stewardship of these investments. The Board of Trustees as well as school leadership make this a priority in all deliberations—at all times.

With grateful hearts, we extend our sincere appreciation to everyone whose name appears in this report and also the many who provided other types of support: through a cheerful word at just the right time; volunteering to help in a classroom, an extracurricular activity, or school

event; a positive voice in the community; and other important ways that we all support each other in our shared love of Frederica Academy.

We especially want to acknowledge and thank those in leadership positions who helped fuel our record-breaking fundraising year: Abigail and Steve Hoover, Annual Fund Chairs; Jenny and Paul Thompson, Derby Day Co-Chairs; Myra and John Wetzler, Derby Day Co-Chairs; Joel Arline, Apogee; Trey Brunson, Friends of Frederica; Barry Kaminer, Parent Association President; and David Yarborough, Booster Club President.

We, of course, also extend our sincere appreciation to **Ellen Fleming**. The entire Board of Trustees joins us in expressing our heartfelt appreciation for Miss Fleming's commitment to Frederica Academy. Her returning as Interim Head of School at a pivotal point to a school she loves so dearly has been such an important part of this year's success. Miss Fleming lives the Frederica mission every day, and we remain eternally grateful for her capable leadership while we search for the next great leader for our school.



Your support demonstrates that you care about the school's success and are willing to make investments to achieve our mission and our shared goals as outlined in the school's strategic plan. This speaks clearly to the faculty and leadership which further inspires them; it also communicates a clear message to the outside community that our constituents believe in what Frederica Academy is doing. This translates into Foundation support as well as building our reputation in the greater NAIS community. As we look for a new Head of School to lead Frederica into the next half century of the school's tenure, this reputation and ability to demonstrate constituent support is the most important asset that we have in selling Frederica Academy to the caliber of leader we are seeking.

The future is bright for Frederica Academy because of your past and ongoing support to Frederica Academy. The theme for the 2018-2019 year is "All that comes later, starts now: Joyful Preparedness." The success of 2017-18 plays an enormous role in embracing that ideal. We are so blessed by our partnership with you.

Sincerely,

A handwritten signature in blue ink that reads "Sandi Channell".

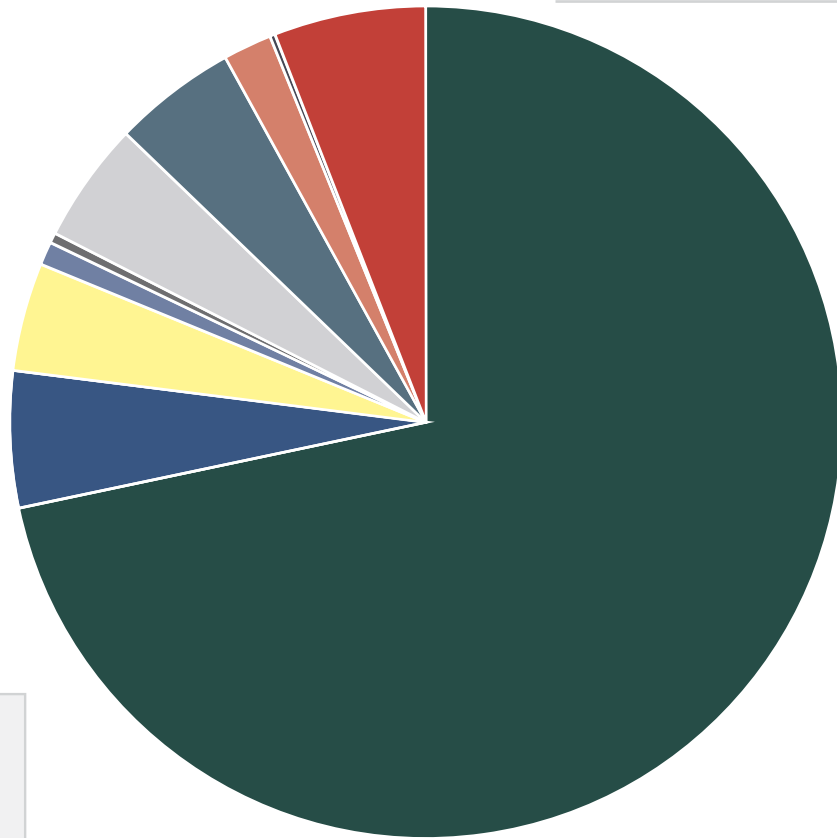
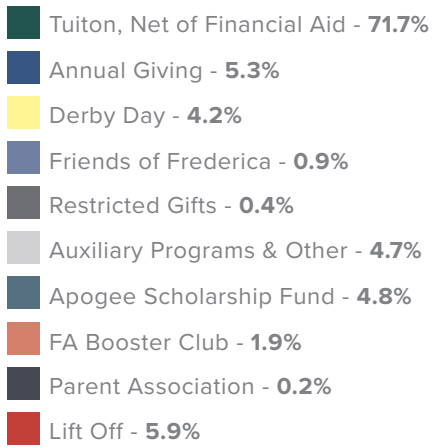
Sandi Channell
2017-2018 Board Chair

A handwritten signature in blue ink that reads "Kristi Harrison".

Kristi Harrison
2017-2018 Advancement Committee Chair

Editor's Note: This publication acknowledges gift, donations, and contributions made to Frederica Academy between July 1, 2017, and June 30, 2018. We attempted to make every effort to include all donors in this report. Please accept our most sincere apologies if we inadvertently omitted, misspelled, or misplaced any donor or contributor names.

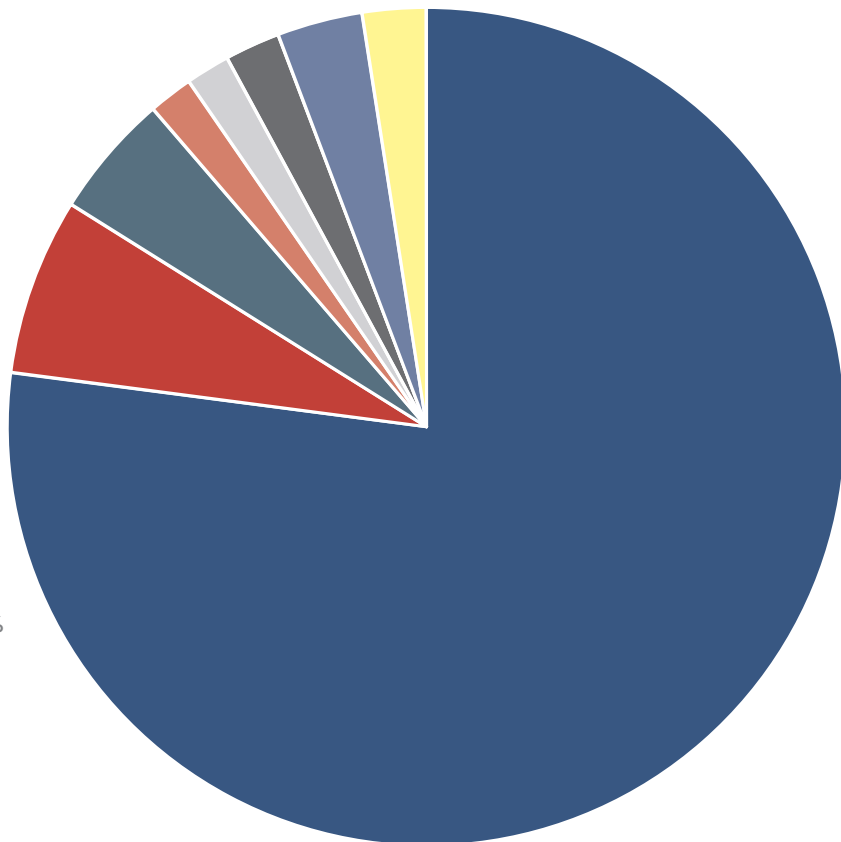
REVENUE 2017-2018*



"THE GAP"

Donor support comprised more than 24% of the total revenue.

EXPENSES 2017-2018*



*Unaudited 2017-2018 Financial Data

Board of Trustees – Executive Committee

Sandi Channell, Chair
Greer Brown, Vice Chair
Jon Osgood, Treasurer and Finance Committee Chair
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Ann McGlaughlin, Assistant Secretary
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Hank Rowland, Building and Grounds Committee Chair
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Elizabeth Veal, Strategic Plan Chair

Board of Trustees – Members

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Delaine Haulbrook
Steve Hoover
Susan Myers
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Zach Powell
Alfred Sams
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Diane Laws
Gail W. Manning
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Dennie McCrary
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John Rogers
Ben T. Slade III
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Rees Sumerford
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Mike Saunders
Susan Shipman
Bonney Shuman
Scott Steilen
Ruth Stephenson
John Trainer
Susan Corn Wainright
Jane Watson
Muriel Windolf
Woody Woodside

Parent Association Leadership

Barry Kaminer, President
Kelly Morgan, President Elect
Monica Linert, Treasurer
Dana Carter, Volunteer Coordinator
Kristen Moore, Fundraising Coordinator

Booster Club Leadership

David Yarborough, President
Elizabeth Brunson, Vice President
Alisha Seymour, Treasurer
Marybeth Steilen, Volunteer Coordinator
Dana Parker, Concessions
Olympia Poulakis, Concessions
Mark Fritchman, Events Coordinator
Jimmie Boyd, Spirit Wear Coordinator
Micki Carter, Immediate Past President

Student Leadership

Piper O'Quinn, Upper School Student Council President
 George Poulakis, Upper School Student Council Vice President
 Emily Harrison, Upper School Student Council Treasurer
 Curran Squire, Upper School Student Council Secretary
 George Poulakis, Upper School Honor Council President
 John Mitchell Brock, Upper School Honor Council Vice President
 Ryan Steilen, Upper School Honor Council Secretary
 Macall Dyer, Upper School Honor Council Senior Representative
 Kate Worthley, Upper School Honor Council Junior Representative
 Erica Daley, Upper School Honor Council Sophomore Representative
 James Cruikshank, Upper School Honor Council Freshman Representative
 Mackenzie Morgan, Upper School Honor Council Member At Large
 Constance Sullivan, Upper School Honor Council Member At Large
 Joe Levitan, Senior Class President
 Alastair Campbell, Junior Class President
 Britton Sullivan, Sophomore Class President
 James Cruikshank and Lauren Jobe, Freshman Class Representatives
 Charlie Runyan, Middle School Student Council President
 Ellie Runyan, Middle School Student Council Vice President
 Spencer Sullivan, Middle School Student Council Treasurer
 Case Harrison, Middle School Student Council Secretary

2017-2018 Young Alumni Council

Cole Ackerman '13
 Brandon Blake '15
 Park Brady '14
 Sara Gierc '17
 Ridge Harrison '13
 Maggie Holt '17
 Emory Larkin '14
 Hunter Levitan '16
 Will MacArthur '15
 Manning Mercer '16
 Alexis Mitchell '14
 Nick Noltes '17
 Simms O'Quinn '16
 Chris Osgood '17
 Connor Runyan '17
 Mary Ellen Shuman '13
 Hayden Squire '15
 Nick Steelman '16
 Brett Steilen '15
 Malik Tatum '16
 Nell Thomas '13
 Eli Yarborough '13

OPERATIONAL FUNDRAISING COMPARISONS

	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
Annual Fund	\$166,366	\$293,368	\$294,481	\$458,715	\$351,034
Apogee	\$270,000	\$253,000	\$300,000	\$308,898	\$326,391
Derby Day	\$143,236	\$180,194	\$186,231	\$208,117	\$269,489
Friends of Frederica			\$25,000	\$176,000	\$55,250
Restricted Gifts	\$34,500	\$20,152	\$31,735	\$88,072	\$25,083
Booster Club Memberships + Sponsorships (Excludes Gate + Concessions + Spirit Wear)	\$60,512	\$76,921	\$91,005	\$97,583	\$99,085
Lift-Off Campaign					\$379,001
TOTALS	\$674,614	\$823,635	\$928,452	\$1,337,385	\$1,508,335

2017-2018 ANNUAL FUND BENEFIELD SOCIETY

Gifts to the Annual Fund of \$1,000 and above are designated to be at the J. Dewey and Tiggle Benefield Society level. These donors are appreciated and recognized by being included as a member of a group named after the school's founders, Dewey Benefield and his late wife, Tiggle.

Leader's Circle (\$25,000+)

Muriel and Jack Windolf & Hillary and Craig Johnston

Founder's Circle (\$10,000-\$24,999)

Anonymous
Tiggle and Dewey Benefield
Elizabeth and Trey Brunson
Robert W. Danforth
Sybi '95 and Matt Kuchar
Robin and Davis Love III
Ann and Tim McGlaughlin
Bonney and Billy Shuman

Benefactor's Circle (\$5,000-\$9,999)

Anonymous
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Laura and Greer Brown
Marsha Certain, M.D.
DeRatto Family
Michele and Tim Jamieson
Kim and Zach Johnson
Monica and Eric Linert
Anne MacLeod
Eric MacLeod, M.D.
Dana and Jim Manning
Alannah and David O'Quinn
Mimi and John Rogers
Riley and Alfred Sams
Kathryn and Mike Saunders
Sommer and Justin Whitlow
Katie and Jason Widener

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Shenon Badre and Ahmed Elsharkawi
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Headmaster's Circle (\$1,000-\$2,499)

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Jim and Maggie Dutton Hackendale
Anna and Steve Hall
Lori Hamm
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Delaine and Robert Haulbrook
Lee and James Heery
Jen and Brad Hutcherson
Mary and Jon Jenrette
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Carla and Adam Lewis
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Elizabeth and Daniel Veal
Leigh and Zack Veal
Mr. and Mrs. Lertchai Vongchaisit
Jane and Richard Walker
Jennifer and Jim Wall
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 Carole and John Melvin
 Julie and Greg Rhodes
 Alisha and Jeff Seymour '87
 Betsy and Greg Simmons
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 Jessica and Brian Wyrick

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 Kay '80 and Hugh Brown
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 Helen and Jeff Rentz
 Roger Ryan
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 Paige Tiller
 Betsy and Henry Worthy

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 Kellie and John Blogg
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 Wissal and John Byrnes
 Nicole Campbell '84
 Caroline and Chip Champion '88
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 Angela and Kent Harrison
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 Catherine and Steve Holt
 Katie and Lee Knox

2017-2018 ANNUAL FUND DONORS

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Dawn and Trevor Holloway
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Loretta and Ladell Jackson
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Susan and Steve Jobe
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Brad and Leslee Lawrence

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Jan and Dwight Payne

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Erin and Justin Sykes
Angel Tatum
Julianne and Michael Temple
Elizabeth and David Thompson
Ltc. (Ret.) George A. and Ashley M. Tindle
Erin and Curtis Titter
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Bethany and Jared Vann
Kay and Thomas Vann
Brannen Veal
Catherine Veal
Nikki and Greg Walbridge
Jeanne Warwick
Jennifer and Van Waters
Myra and John Wetzler
Tina and Jerry Whaley
Tom Willis '86
Amber and David Yarborough
Ashley Zimmermann

IN MEMORY OF TIGGIE BENEFIELD



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James F. Bethea
Mr. and Mrs. Claude H. Booker, Jr.
Al Brown
Laura and Greer Brown
Kathy and Jim Brown
Seaton Brown '05
Judy and Jerry Butler
Gigi Capes
Sandi and Rocker Channell
Grace Compton
Ann DeLoach
Don Gammon
Gilbert, Harrell, Sumerford & Martin
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Laura and Jud Vann
Jeanne Warwick
Bonnie and Edward Weeks
Wellons and JP Williams

Memorial Gifts

Lawrence Certain
Linda Edgar
Jane Trowbridge

In Honor Gifts

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Sandi Channell
Ellen Fleming
Haley Hackendale '05
Jack Hoover
Laura Nevins
Anna Jane Powell '18
Zach Powell
Pre-Kindergarten Teachers (Mrs. Childers and Mrs. Jobe)
Arden Simmons '18

Foundation Gifts

The Azalea Fund
The Broadfield Foundation
Communities of Coastal Georgia Foundation
Community Foundation of Central Georgia, Inc.
Community Foundation of the Chattahoochee Valley
The Community Foundation for Northeast Florida
Davis Love III Foundation
The Fraser-Parker Foundation
Lloyd A. Fry Foundation
National Christian Foundation Orlando
PGA Tour Charities, Inc.
The Ruth R. Hoyt - Anne H. Jolley Foundation, Inc.
The Three T's Foundation

ANNUAL FUND COMPARISONS

	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
Amount Raised	\$252,000	\$269,000	\$272,000	\$200,865	\$235,962	\$166,366	\$293,368	\$294,481	\$458,715	\$351,034
# of Gifts	256 Gifts	297 Gifts	260 Gifts	276 Gifts	285 Gifts	265 Gifts	307 Gifts	339 Gifts	333 Gifts	325 Gifts
Average Gift Size	\$984	\$906	\$1,046	\$728	\$830	\$630	\$956	\$869	\$1,377	\$1,080
Top-5 Give Total	\$120,000	\$117,500	\$110,000	\$60,000	\$74,000	\$32,000	\$102,000	\$89,976	\$198,455	\$70,865
Average w/o Top-5	\$525	\$518	\$635	\$520	\$580	\$513	\$574	\$612	\$793	\$900
# of \$1,000+ Gifts	72 Gifts	59 Gifts	70 Gifts	68 Gifts	75 Gifts	67 Gifts	81 Gifts	92 Gifts	110 Gifts	110 Gifts
Faculty Participation	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Trustee Participation	100%	100%	100%	100%	100%	100%	100%	100%	95%	100%
Parent Participation	53%	70%	76%	72%	73%	67%	85%	87%	83%	65%

Apogee

Georgia School Choice
Scholarship Fund

Frederica Academy's need-based financial aid policy states, "A strong financial aid program supports Frederica Academy's goal that the ability to pay the full tuition not be a deciding factor in determining whether or not a promising young person may attend the school. Families who feel they have financial need are encouraged to apply. All aid is need-based; however, financial participation is required on the part of every family whose child receives aid. Frederica Academy's need based financial aid program has a twofold purpose: to provide for deserving students an opportunity for a high quality education which might otherwise be unobtainable for them and to provide to the school a well-qualified student body reflecting a broad social and economic mix."

National trends in independent schools indicate that all National Association of Independent Schools (NAIS) see increased demand for financial aid each year, and Frederica Academy is no exception. Although Apogee donations make a significant contribution, there is still an unfunded need within the Apogee student population. Because this population is defined as students who have come from public school or are attending school for the first time, many of our new students fall into this category. Our market is unique in that, on average, 60% of our new students come from local public schools. Therefore, if they chose to apply for financial aid, Apogee funds could be used for funding.

The partnership with Apogee has been extremely beneficial to Frederica Academy as the demand for our need-based financial aid has grown in recent years. Frederica Academy has raised over \$2.4 million in Apogee financial aid funds since the program started in 2008. Thank you to all who have participated, and we hope everyone will advocate in our community about the value of keeping these Georgia tax dollars in the Glynn County community and working for Frederica Academy.

The Georgia Tuition Tax Credit Scholarship program allows Georgia taxpayers to receive an income tax credit for donations to registered Student Scholarship Organizations (SSOs). Once pre-approved by the Georgia Department of Revenue, participating taxpayers make a donation to a registered SSO. When making the donation, the donor designates a participating independent school to receive the funds. Frederica Academy selected the Apogee Georgia School Choice Scholarship Fund to be its primary SSO partner.

A donor must be a Georgia taxpayer and must designate one of the following filing statuses:

• Individual filer	\$1,000
• Married individual who files separately	\$1,250
• Married couple filing jointly	\$2,500
• S-Corp	\$10,000
• Member of an LLC	\$10,000
• Partner in a Partnership	\$10,000
• C-Corp or Trust	Up to 75% of Georgia tax liability

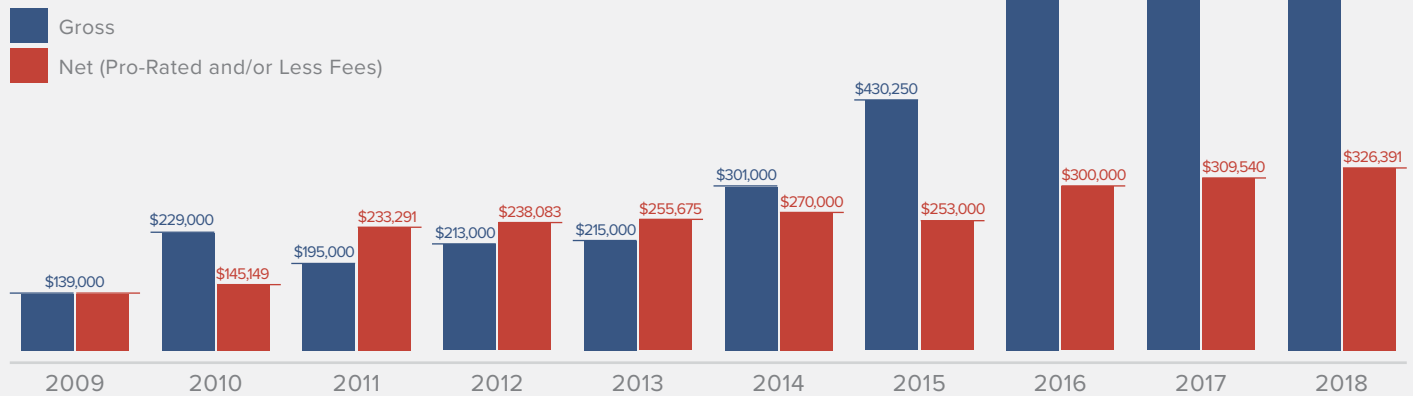
ST. SIMONS BANK & TRUST

a division of TNB

We salute St. Simons Bank and Trust for its ongoing support and steadfast devotion to helping fund Frederica Academy's need-based financial aid program. As a C-Corporation, St. Simons Bank & Trust is eligible to participate in the program by making a donation to the scholarship fund and, at the same time, reducing its Georgia tax liability in the amount of the donation.



CONTRIBUTIONS OVER THE YEARS



Corporate Donors

St. Simons Bank & Trust (a division of TNB)

LLC/Partnership/S-Corp Donors

James Anderson
Daron Arline
Ali and Joel Arline
Mark Bearden
Bonnie and Kevin Brooks
Samuel Butler
Melissa and Jody Cagle
Diana Cicchiello
Margie and Will Dorminy
Michael Fairman
Thomas Gore
Timothy Gore
Pam and J. Lamar Gore
Jack Gore
Maggie and Jim Hackendale
Kelly and Brian Harman
Kristi and Ron Harrison
Michelle and Daniel Hocutt
Abigail and Steve Hoover
Kim and Zach Johnson
Richard Kerns
Kari and Patton Kizzire
Eric Linert
James Magbee, Jr.
Christopher Mears
Marc Mercer
Cathy and Alex Miller
Amanda and John Panessa
Diane and Woodrow Sapp
Angela Scott
Rene and Richard Shelnutt
Bonney and Billy Shuman
Catherine and Steve Squire
Katherine and Hudson Swafford
Jenny and Paul Thompson
Catina and Wayne Tindall
Ken Trowbridge III '79
Linda and Jimmy Veal
Elizabeth and Daniel Veal
Leigh and Zack Veal
Catherine Veal
George Warwick
Missy and John Weaver

Amber Wellman-Carlson

Jenny and Jay Wiggins

JR Wright '06

Individual and Joint Donors

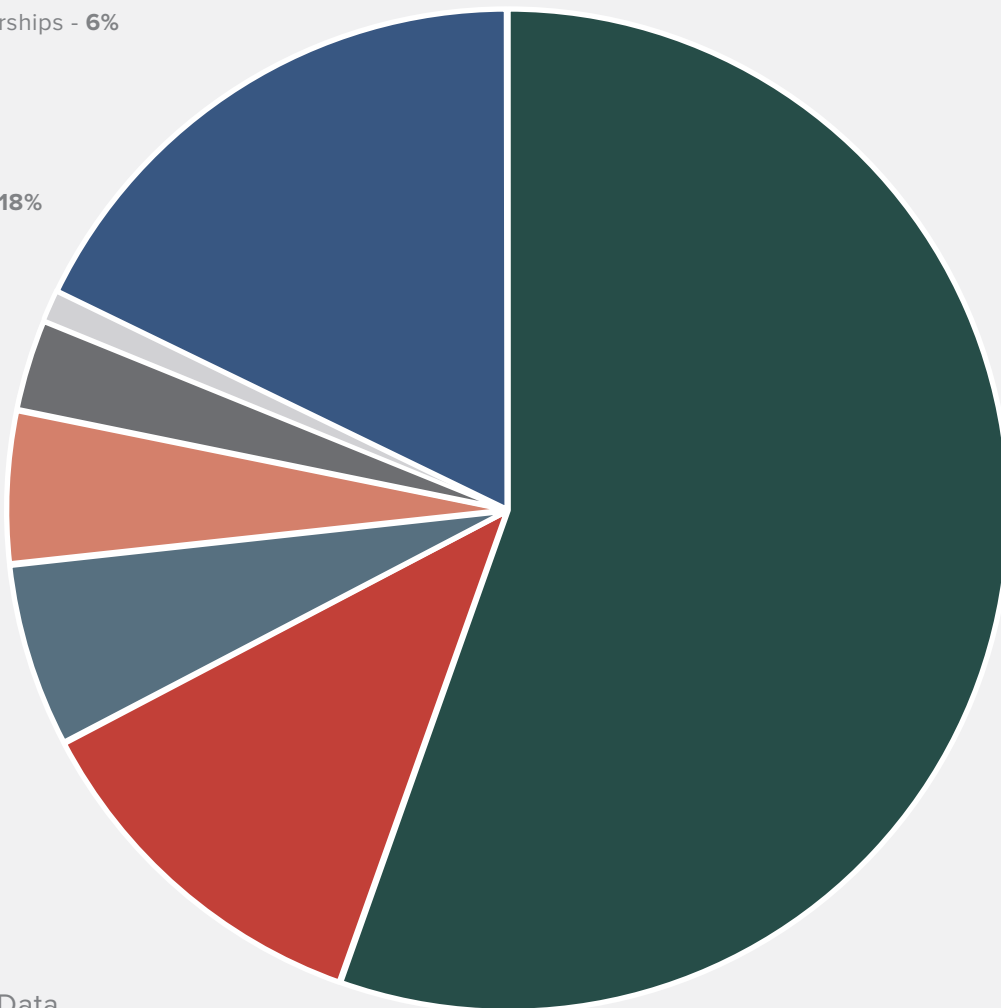
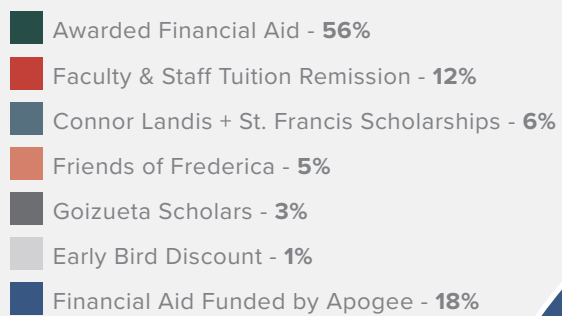
Brooke and Riddick Ackerman
Julie and Rick Ackerman
Candi and John Allison
Andrea and Richard Altman
Kelley Baione and Dale Carpenter
Laurna Been '83
Julie and John Beimler
Susie and Jim Benefield '81
Tiggie and Dewey Benefield
Dorothy Brock
Detra and Mitch Brock '86
Heather and Aaron Brock
Mary Brown
Kathy and James Brown
Laura and Greer Brown
Amanda and Jonathan Byrd
Wissall and John Byrnes
Nicole Campbell '84
Claire and James Campbell
Ashly Shingler
Julie and Hank Rowland
Micki and Dan Carter
Dana and Denny Carter
Marsha Certain
Caroline and Chip Champion '88
Sandi and Rocker Channell
Pat Cooper
Eleanor Daniel
Catherine Bowman and Theodore Davis, Jr.
Laura and Edward DiPreta
Caroline and Charlie Dorminy
Amanda Duffey
Tina and Louis Dyer
Martha and Tom Eckert
Laura and Bill Edenfield
Misty Leigh Williams and Marty Fitzjurls
Charlotte Floyd
Jackie Goldstone
Lawanda and Steven Graham
Sandra and Jerry Harper
Rachel and Robert Harper
Lee and Rip Heery
Deirdre and Erin Byers

Susan and Dan Hogan
Catherine and Steve Holt
Debbie and Tom Hutcherson
Jennifer and Brad Hutcherson
Susan Shipman and Mark Jicha
Gretchen Johnson
Leighton Johnson
Sarah and Mark Jules
Diane and William Laws
Suzanne and Chase LeRoux '92
Robin and Davis Love III
Joyce and Huitt Mattox
Ann and Tim McGlaughlin
Ania and Scott McQuade
Kim and Tom Meadows
Alicia and Lane Moore '88
Tara and Steven Mosher
Alannah and David O'Quinn
Debbie and Jon Osgood
Pat and Noel Osteen
Kelli and Justin Osteen
Dana and Patrick Parker
Jan and Dwight Payne
John Pope
Nikki and Christopher Pope
Olympia and John Poulakis
Elizabeth and Zach Powell
Helen and Jeff Rentz
Mary and Turner Rentz
Mimi and John Rogers
Denise and Kyle Roy
Peggy and Whit Russell
Roger Ryan
Laurie and John Sarzier
Lauren and Sean Simmons
Marybeth and Scott Steilen
Dawn Stephan
Tracey and Jonathan Tennant
Leigh and Thad Truett
Melissa and John Tsai
Mary and Robert Turner
Brooke and Jim Walker
Laurie and Kirk Watson
Jane and Jim Watson
Kim and Mike Watson
Katie and Jason Widener
Tom Willis '86
Charity and Timothy Wilson

Donor Program	Description	Notes
Annual Fund (September - June)	Nearly every independent school relies on annual giving to support its operating budget and bridge the fiscal realities that lie between tuition income and the actual cost of educating students. At Frederica Academy, tuition covers approximately 80% of the expenses of operating our school. The Annual Fund is a critical source of revenue for covering this 20% gap. The Frederica Academy Annual Fund helps make tuition more affordable for more families while offering parents a tax-deductible benefit for at least part of their investment in their child's education. Through gifts large and small, the Annual Fund supports our devoted faculty, our premier college counseling program, our athletics offerings, our arts opportunities and so many other positive differentiators that make Frederica Academy so much a part of the lives of our students, their parents and our community.	<ul style="list-style-type: none"> Donors who give (\$1,000+) are invited to the Annual Fund Party, which is usually held in November. Donors are encouraged to make their Annual Fund pledge by December 15th. All faculty and parents are encouraged to make a commitment to the Annual Fund Oyster Roast.
Apogee Georgia School Choice Scholarship Fund (June - December)	Since 2009, Frederica Academy has raised over \$2.4 million through its partnership with the Apogee Georgia School Choice Scholarship Fund. The program allows Georgia taxpayers to receive a dollar-for-dollar income tax credit for contributions. Donors may also get the added benefit of listing the donation as a charitable contribution on their federal tax return. Thanks to Governor Deal signing HB 217, the state-wide cap has been increased from \$58 million to \$100 million starting in 2019. Funds were completely depleted on the first day of enrollment last year; therefore, all donations were pro-rated to 55%. With this year's changes, the pro-rated formula is expected to be around 90% . For the 2019 campaign, enrollment opens in June 2018, and we race to make sure that everyone is signed up before the first of December. Payments will be due in March 2019. You do not have to be a Frederica family to participate, but you must have Georgia state income tax liability. Interested participants are encouraged to discuss the program with their CPAs and tax advisors.	<ul style="list-style-type: none"> Online enrollment opens in June 2018. Apogee Awareness Campaign begins in September 2018. Donors are encouraged to make their donation by December 15th. Payment due in March 2019.
18th Annual Derby Day (May 4, 2019)	An annual, recognized event in the Golden Isles, Derby Day is Frederica Academy's signature fundraiser each year. So much so, Derby Day is a line item in the school's annual budget. Thus, the event supports everything from enrichment programs to daily operating expenses. Each year, a percentage of proceeds is diverted to the permanent endowment (Frederica Forever Fund).	<ul style="list-style-type: none"> Saturday, May 4, 2019 Sponsorship packages available Tickets on sale May 1st
Restricted Giving / In-Kind Support (ongoing)	Donors, in consultation and coordination with the Advancement Office, may give donations that are earmarked for a specific program/investment or may give a pre-approved in-kind donation to the school. Examples of possible programs to support are the arts, academic programs, athletic initiatives, and many others.	<ul style="list-style-type: none"> Gifts can be given at any time.
Friends of FA (ongoing)	The Friends of FA Fund offers the opportunity for donors to provide support to students who qualify for maximum financial aid as well as to supplant other school expenses where needed, expanding Frederica's ability to attract students who will clearly benefit from a Frederica Academy education but require substantial need-based assistance.	<ul style="list-style-type: none"> May not be directed to a specific student. 10% of all donations go to the permanent endowment.
Planned Giving / Legacy Gifts (ongoing)	Planned gifts are custom-designed gifts that offer tax advantages to donors while providing long-term financial support for the school. Frederica established the Frederica Forever Fund to allow donors the ability to invest in Frederica through gifts of bequests, qualified retirement plans, annuities, trusts, and insurance policies.	<ul style="list-style-type: none"> Dictated by donor's estate plan. Consultation with the Advancement Office is recommended.
Booster Club (ongoing)	The Booster Club supports Frederica Academy's athletic programs and promotes school spirit throughout the year. Revenue supports all athletic programs.	<ul style="list-style-type: none"> Members receive complimentary tickets to home games (except football). Booster Club Golf Tournament is held annually.
Parent Association (ongoing)	All FA parents are members of the Parent Association, and there are no dues. Each Fall, the Parent Association sells poinsettias and holiday greenery as a fundraiser to support its operations and to help fund special projects for the school. Additionally, the Parent Association coordinates affinity programs with Harris Teeter, Publix, Lands' End, Box Tops for Education, Labels for Education, and AmazonSmile.	<ul style="list-style-type: none"> Greenery order deadline is November 15th. Poinsettias and greenery are sold during the week of December 1st.

Key Dates	Levels or Categories	Process
<p>Enroll at a Leadership Level</p> <p>Invited to the Benefield Society</p> <p>Usually held each December.</p> <p>Encouraged to enroll in the</p> <p>or to December 31, 2018.</p> <p>Parent participants who make a</p> <p>invited to attend the Annual</p> <p>ast in early 2019.</p>	<ul style="list-style-type: none"> Pinnacle Circle (\$50,000 - \$100,000+) Leaders' Circle (\$25,000 - \$49,999) Founders' Circle (\$10,000 - \$24,999) Benefactors' Circle (\$5,000 - \$9,999) Patrons' Circle (\$2,500 - \$4,999) Headmasters' Circle (\$1,000 - \$2,499) Friend (\$500 - \$999) Supporter (\$250 - \$499) Contributor (\$249 or less) 	<p>Complete enrollment form and return it to Frederica Academy Advancement Office: 200 Murray Way, St. Simons Island, GA 31522</p> <p>Participants may also enroll online.</p> <p>Contact: John Pope johnpope@fredericaacademy.org</p>
<p>nt available June 2018 for the</p> <p>ess Week is November 5-10.</p> <p>uraged to enroll by early</p> <p>March 2019.</p>	<ul style="list-style-type: none"> Individual filer (\$1,000) Married individual filing separately (\$1,250) Married couple filing jointly (\$2,500) S-Corp (\$10,000) Member of an LLC (\$10,000) Partner in a Partnership (\$10,000) C-Corp or Trust (Up to 75% of Georgia tax liability) 	<p>Enroll for Apogee at https://www.apogeebase.com/donate</p> <p>Contact: Brad Hutcherson bradhutcherson@fredericaacademy.org</p>
<p>2019.</p> <p>tickets available in January 2019.</p> <p>March 2019.</p>	<ul style="list-style-type: none"> Underwriter - \$10,000 Triple Crown - \$5,000 Winner's Circle - \$2,500 Turf Club - \$1,000 Jockey Club - \$500 Event Tickets - \$125 	<p>Co-Chairs: Jenny and Paul Thompson Elizabeth and Zach Powell</p> <p>Contact: Brad Hutcherson bradhutcherson@fredericaacademy.org</p>
<p>en at any time.</p>	<ul style="list-style-type: none"> Donor's discretion 	<p>Transmit payment to Advancement Office and designate purpose of gift.</p> <p>Contact: John Pope (johnpope@fredericaacademy.org)</p>
<p>ected to a specific student.</p> <p>tions will be transferred to the</p> <p>owment of Frederica Academy.</p>	<ul style="list-style-type: none"> Donor's discretion 	<p>Contact: John Pope johnpope@fredericaacademy.org</p>
<p>or and should be done in</p> <p>n legal and/or tax advisor.</p>	<ul style="list-style-type: none"> Donor should seek legal and/or tax advice regarding gift amount. 	<p>Donations to Frederica Academy via a trust, annuity, insurance policy, or a bequest.</p> <p>Contact: John Pope (johnpope@fredericaacademy.org)</p>
<p>Free family admission to</p> <p>(including playoffs).</p> <p>olf Tournament – July 7, 2018</p>	<ul style="list-style-type: none"> Ultimate Membership - \$5,000 Knights of the Round Table - \$2,500 Platinum - \$1,500 Gold - \$500 Silver - \$250 Bronze - \$150 Young Alumni - \$50 	<p>Complete membership form and return it to Frederica Academy Booster Club: 200 Murray Way, St. Simons Island, GA 31522</p> <p>Contact: Elizabeth Brunson, Booster Club President 4ebrunson@comcast.net</p>
<p>deadline is October 30, 2018.</p> <p>greenery delivered the first</p> <p>per.</p>		<p>Contact: Kelly Morgan, Parent Association President skmorgan10@comcast.net</p>

2017-2018 TUITION DISCOUNTS/FUNDING WITH APOGEE



Unaudited 2017-2018 Financial Data



Lift-Off Campaign

Anonymous (1)
 Alison and Joel Arline
 Tiggle and Dewey Benefield
 Laura and Greer Brown
 Sandi and Rocker Channell
 Kristi and Ron Harrison
 Delaine and Robert Haulbrook
 Abigail and Steve Hoover
 Dana and Jim Manning
 Ann and Tim McGlaughlin
 Susan and Don Myers
 Alannah and David O'Quinn
 Debbie and Jon Osgood
 Dana and Patrick Parker
 Riley and Alfred Sams
 Terry Thomas Foundation
 Brooke and Jim Walker

Restricted and In-Kind Gifts

Julie and Rick Ackerman
 Tammy and Stephen Arant
 Julie and John Beimler
 Dewey Benefield
 Jimmie and Roy Boyd
 Laura and Greer Brown
 Elizabeth and Trey Brunson
 Ashley and Buck Cavalier
 Sandi and Rocker Channell
 Scott Corwon
 Gary Cumby
 Nancy A. Denlea, M.D. and Michael J. Sullivan, M.D.
 Brandon Derrick
 Laura and Bill Edenfield
 Jim Farrelly
 Ellen Fleming
 Charlotte Gore
 Golden Isles Youth Orchestra
 Pat and B.P. Harris
 Delaine and Robert Haulbrook
 Susan and Dan Hogan
 Libby and Robert Horton
 Lindsay Maxwell
 Stefanie and Bill McHugh
 Rachel Nash
 Alannah and David O'Quinn
 John Pope
 Elizabeth and Zach Powell
 Mimi and John Rogers
 Laurie and John Sarzier
 Bonney and Billy Shuman
 Jill Sorbie
 Jennifer and Dudley Stephens
 Nikki and Greg Walbridge

2017-2018 PARENT ASSOCIATION FUNDRAISING (NET)

Uniform Sales	\$2,605
Affinity Programs	\$2,984
Poinsettia and Greenery Sale	\$7,375
TOTAL	\$12,964

Thank you for your continued support of our school and your Parent Association. It is through your generous support that we are able to provide and subsidize events and programs at Frederica Academy that have a direct impact on your children. Our goal is to increase our fundraising proceeds to allow us to do more for the school community each year. Through these efforts we are able to provide the Back-to-School Barbeque, support the Lower School garden, maintain our uniform collection and resale closet, purchase or repair equipment as requested, contribute to the MakerSpace, Academic Centers and so much more. One of the most important and impactful programs that we support as a Parent Association is the continued education and professional development of our teachers. We want our faculty to have the most current and cutting-edge teaching techniques and programs.

ED RALSTON MEMORIUM GIFTS



Anonymous (4)
 Sharon and Bonneau Ansley
 Pauletta and Bob Atwood
 Jane and John Beadles
 Alicia and Bill Blodgett
 Judy and Claude Booker
 Reg and Terry Bridges
 Sandi and Rocker Channell
 Lillian Clarke
 Meg and Jack Crews
 Mike and Dave Fox

Linda and Tom Heagy
 Delores and Jake Johnson
 Toni Laird
 Gail and Scott Ledbetter
 Art Lucas
 Georgia Ann and Jack Markley
 John Pope
 Kathy and Jonathan Raclin
 Alice and John Selman
 Sandy and Martin Turbidity
 Susan Corn Wainright

Presenting Sponsors

Beachview Event Rentals & Design
Sea Island

Triple Crown Sponsors (\$5,000)

H&H Lifestyles
Bonney and Billy Shuman
Ruth and Keith Stephenson

Winner's Circle (\$2,500)

Anonymous
Ameris Bank
Brunswick News Publishing Company
Frederica Storage Company
Gore Marine Transportation Company (G.M.T.C.)
Angela and Kent Harrison
Elizabeth and Zach Powell
PrimeSouth Bank
Slater Family
St. Simons Bank & Trust

Turf Club (\$1,000)

Anonymous (2)
Ashley's Business Solutions, Inc.
Brown-Rose Wealth Management
Sandra and Bill Brunson
Canal Road Self Storage
Sandi and Rocker Channell
Fredrick DeRatto and Barbara DeRatto
Caroline and Charlie Dorminy
Brooks and Chip Evans
Face to Face Designs
Brian Harman Golf, LLC
Katherine and Mike Henderson
Dr. Steven and Roselle Johnson
Joy and Lon Lewis
Dana and Jim Manning
Ann and Tim McGlaughlin
Deborah Nash
Alannah and David O'Quinn
Mr. and Mrs. Patrick Parker
Portable Air LC

Premier Printing
Beth and Ken Quinn
Sapelo Equipment & Rental Company, LLC
Laurie and John Sarzier
Virginia and Joe Schlegel
Leighton Johnson of Silverton Mortgage
South Coast Bank & Trust
Southeast Georgia Health System
Catherine and Steve Squire
St. Simons Dental Associates
Thomas Thaddeus Truett, Architect
Turner & Associates Insurance, Inc.
Laurie Watson - MBP Designs
Laurie and Kirk Watson
Weaver Orthodontics
Woodward & Associates

Jockey Club (\$500)

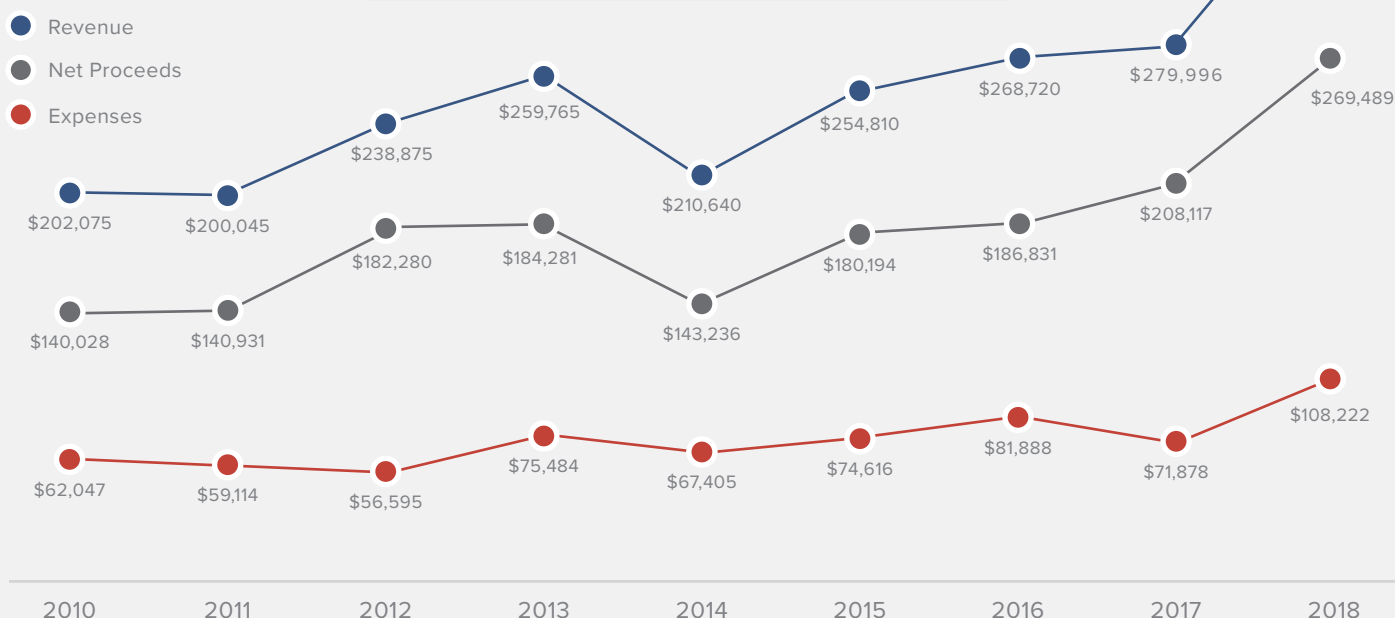
Anonymous
Active Deployment Systems
Amman Bennett Rice Wealth Management - Merrill Lynch
Arline & Wiggins, CPAs
BeSeen Outdoor
Boyd Law Firm
Jane and Bobby Buckler
Gigi Capes
Jeanie and Kim Cassell
Ashley and Buck Cavalier
Chick-fil-A (Saint Simons)
Coastal CPAs, LLC (Ben Lee)
Coastal Oral Surgery
Coastal Gnat & Mosquito
Theodore H. Davis, Jr. and Dr. Catherine B. Bowman
Dr. Edward and Laura DiPreta
Susan and Patrick Dunn
Tina and Louis Dyer
Emerald Princess II Casino
First Coast Benefits Solutions, Inc.
Jackie and JC Fisher
Hazel Hanlon
The Harrison Law Firm
Charles Hoover
Sarah and Mark Jules
Brenda and Jack Kilgore
Ashley '01 and Ryan '01 Lavallee
Lighthouse Coffee Company
Maison de Papier
Marshside Grill
Moore Stephens Tiller, LLC
Alicia and Lane Moore '88
Bitsy and Duane Moores
Mosquito Authority
Susan and Don Myers
Nazzaro's Italian Cuisine
Kelli and Justin Osteen
Ponsell Heating & Air
Richard Russell/McGinty-Gordon & Associates
Saint Simons Bottle
Riley and Alfred Sams
Schell & Hogan, LLP
Alisha and Jeff Seymour '87
Signature Properties Group, Inc.
Southeastern Bank



Strickland, Certain and Jones
 Michael Sullivan, M.D. and Nancy Denlea, M.D.
 Tracey and Jonathan Tennant
 Ken Tollison
 United Community Bank
 Bethany and Jared Vann
 Catherine Veal
 Kirk Watson - Coastal Georgia Realty
 Webster Tile and Bath, Inc.
 Whatley Pediatric Dentistry
 Sommer and Justin Whitlow
 Williams, Rentz & Moulton, P.C.
 Mr. and Mrs. Milton H. Woodside
 Worthley Industries
 Judy and John Wright



DERBY DAY REVENUE AND EXPENSES



Derby Day Co-Chairs

Jenny and Paul Thompson
 Myra and John Wetzler

Derby Day Committee

Laurie Watson – Sponsorships
 Julie Najawicz – Silent Auction
 Kelley Runyan – Live Auction
 Trey Brunson – Derby Simulcast
 Amanda Duffey & Scott Cochran, Brooke & Jim Walker, Katie & Jason Widener – Raffle
 Caroline Dorminy – Class Projects
 John Wetzler & Paul Thompson – Betting Booth
 Elizabeth Powell & Leigh Veal – Décor
 Myra Wetzler, Jenny Thompson, Julie Najawicz – Setup
 David Yarborough – Master of Ceremonies & Auctioneer
 Elizabeth & Trey Brunson – Patron Party Hosts

Silent Auction Committee

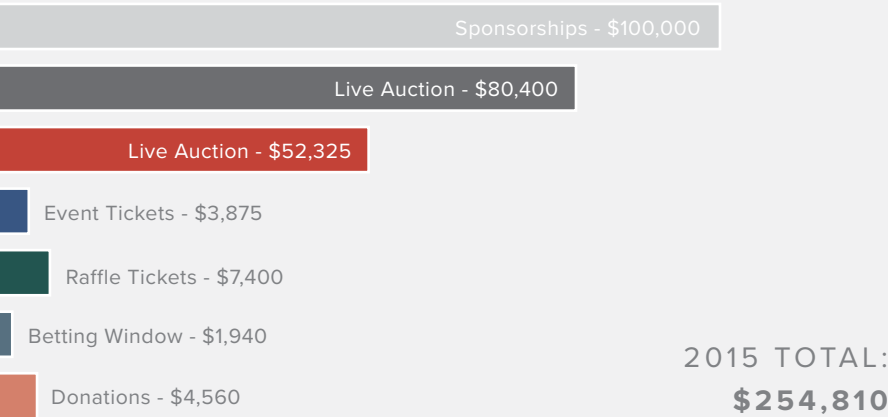
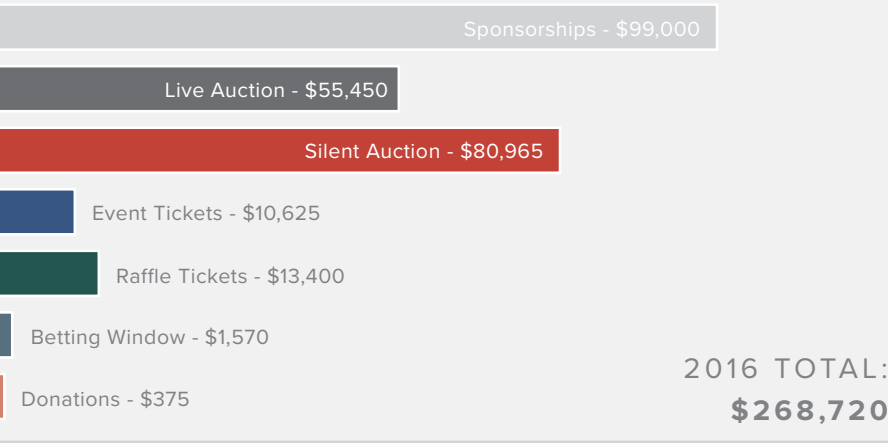
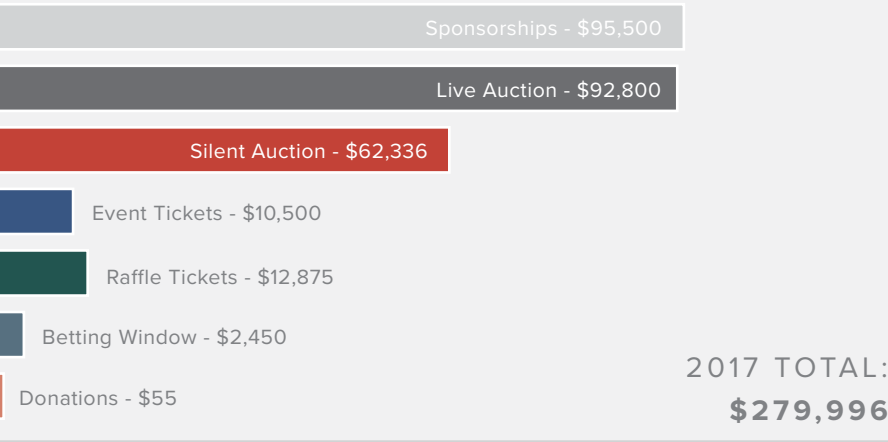
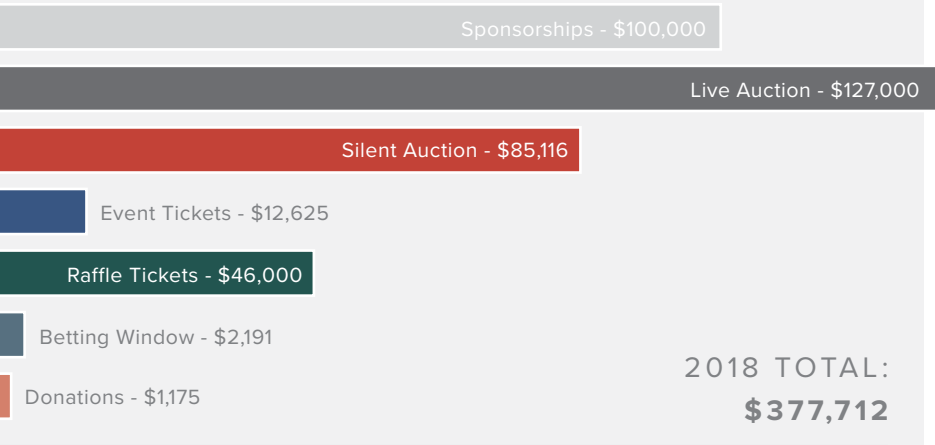
Ali Arline
 Detra Brock
 Elizabeth Brunson
 Amy Certain
 Caroline Champion
 Anne Frazier
 Julie Najawicz
 Jenny Thompson
 Bethany Vann
 Myra Wetzler
 Katie Widener

Student Class Projects Committee

Caroline Dorminy – Coordinator
 Melissa Cagle
 Dana Carter
 Erin Driggers
 Carla Lewis
 Ann McGlaughlin
 Laurie Sarzier
 Lauren Simmons
 Katie Widener

2018 DERBY DAY CONTRIBUTORS AND VOLUNTEERS

DERBY DAY REVENUE BREAKDOWN



Special Contributors

Kent Harrison - Copyright Graphics
Marcie Maddox - Sea Island
Liz Sproule - Sea Island
Mary Starr - Coastal Illustrated
Kathi Williams - Elegant Island Living

Live Auction Contributors

Anonymous (4)
Jonathan and Jackson Byrd
Curtain Bluff Resorts
Hookfire Adventure Travel and Safaris
Patton Kizzire
Sea Island (2)
Bonney and Billy Shuman
Adam Wainwright

Silent Auction Contributors

Anonymous (9)
Advance Aesthetics + Skin Bar
Alexander Pressure Washing/Trash and Debris Removal
Amazon
Ariel
Atlantic Shore Dermatology
B. Lush Salon and Spa
Bailey Boys
Barbara Jean's
Becca Shell Designs
Blue Door Designs
The Brick
Detra Brock
The Brunson Family
Brunswick Bar Pilots' Association
Bubba Garcia's
Butler's Stash
Jonathan Byrd
Cachettes + St. Simons
Canal Road Self Storage
The Carlisle Collection
Rob Carroll
Certified Burgers & Beverage
Chadwick's Jewelers
Caroline Champion
Christina's Dance World
CJ's Italian Restaurant
Cleaning by Raul
Cloister Collection
Cloth & Label
The Club
Coastal Concierge
Coastal Eye Care
Coastal Georgia Historical Society
Coastal Gnat & Mosquito
Coastal Outdoor Adventures
Cottage Flowers
The Crab Trap
Del Sur Artisan Eats
Denae Daniels Salon
DiPreta Dermatology
Dot and Army
Elite Island Resorts
Face to Face Designs

Fair Street Design
 Fancy Q
 Fit4Mom Golden Isles
 Forge
 Frederica Mom
 Georgia Aquarium
 Georgia Sea Grill
 Get Your Muse On
 GJ Ford Bookshop
 Gnat's Landing
 Golden Isles Olive Oil
 Grace Graffiti
 Gunner's Daughter
 H&H Lifestyles
 The Half Shell
 Halyards
 High Tide Carts
 Daniel Hocutt (OX)
 Ashley Holmes
 Home2 Suites by Hilton
 House of Blues
 Hunny Bee Paperie
 India Hicks
 Island Day Spa
 Island Dog
 Island Pho
 J. Hilburn (Kate Dart Stylist)
 Jacksonville Zoo
 Johnson Vann Interiors
 Leighton Johnson
 Zach Johnson
 Joseph Jewelers
 Georgia Kellogg
 The King and Prince Beach & Golf Resort
 Matt Kuchar
 Lagardere Sports
 Lindsay Stewart Photography
 Lindsay Christian Photography
 The Lip Bar
 M + P Interiors, LLC
 Maison de Papier
 Mallery Street Cafe
 Mari Max
 Mark Durant Fine Art
 The Market on Newcastle
 Marshside Grill
 Mary Kay - Laura Moulton
 McRobins
 MEO's Suite
 Nicole Monier
 Mosquito Authority
 Murphy's Tavern
 Julie Najawicz
 NANCY
 Carl Nash
 Nazzaro's Italian Cuisine
 Carol Norton
 Omcore
 The Pack Canine Studio
 Brad Paisley
 Palmer's Village Cafe
 Pane in the Glass
 Steve Penley
 Peruvian Craft and Label
 Pet Exchange



PillowGrace
 Porch
 Olympia Poulakis
 Dr. and Mrs. Zachary Powell
 ProNails
 Puppy Paradise
 Queen Bee
 The Quinn Family
 Restoration Imports
 Reynolds Lake Oconee
 Ritz Carlton - Amelia Island
 Sharon Roberts
 Rodan + Fields
 The RSM Classic
 Sapelo Hammock Golf Club
 Seaside Ophthalmology
 Shackelford Shoes
 Shear Magic
 Simon Says Monogram Everything
 Simply Mac
 Joe Simpson
 Skippers' Fish Camp
 Smallcakes
 Smalltown Table
 SouthEast Adventure Outfitters
 Southeast Nursery
 Splash Auto Spa
 St. Simons Bark Bus
 St. Simons Dental Associates
 The Strand Hair & Skin Gallery
 The Strike Zone
 Sunset Slush
 Swamp Fox Forge (Whitmarsh Tennant, Class of 2023)
 Sweet Mama's
 Rett and Will Thompson
 Tramici
 Uncle Don's Local Market
 Vann's Barber Shop
 The Vine
 Viola's Market
 Wake Up Coffee
 Laurie Watson
 Weber's Growler Factory
 The Westin Jekyll Island
 Williams, Rentz & Moulton, P.C.
 Winston Wiant
 Catherine Wood
 Worthy Pools
 Brian Wyrick
 Yellow Canary



2018 Region & State Golf Champions: Coach Tom Willis, Thomas Hogan, Sarut Vongchaisit, Ryan McHugh, Jack O'Hara, and Cason Cavalier



Knights of the Round Table

Altama Discount Pharmacy
Beachview Event Rentals & Design
Brown-Rose Wealth Management Group at Morgan Stanley
Brunswick Floors
Buccaneer Farms
Coastal Oral Surgery
Coastal Gnat & Mosquito
Dentistry in Redfern
Ponsell Heating and Air
PrimeSouth Bank
Laurie and John Sarzier
Silverton Mortgage
Southeast Georgia Health System

Platinum

Staci and Chris Bennett
Sandra and Bill Brunson
Emerald Princess Casino
Jacobs, Coolidge & Company, LLC
Paradigm Labs
RWM Wealth Management
Signature Properties Group
St. Simons Dental Associates

Gold

Tiggie and Dewey Benefield
Detra and Mitch Brock '86
H&H Lifestyles
Howard & Howard Associates, Inc.
Sara and Mark Jules
Nalley Auto
Tam and Walt Perez
Pet Exchange
Williams, Rentz & Moulton, P.C.
Julie and Hank Rowland
Liz and Heath Slapikas
Catherine and Steve Squire
St. Simons Bank & Trust
The UPS Store
Laurie and Kirk Watson
Weaver Orthodontics



Silver

Sandra and Scott Brickman
Caroline and Chip Champion '88
Martha and Tom Eckert
Flexer Enterprises
Anne and French Frazier
Sandy Grimm
Handy and Carla Jernigan
Luanne and Ralph Morales
Sam Norris
Menchie's Frozen Yogurt
Beyond Expectations
Kelley and Tom Runyan
Coastal Concierge SSI
Lisa and Richard Wood
Kim and Alan Worthley

Bronze

Wendy and Daniel Anderson
Susie and Jim Benefield '81
Kellie and John Blogg
Dick Bobb
Jimmie and Roy Boyd
Amy and Andy Broderick
Aimee and Terry Brown
Debbie and Brad Brown
Darcelle and Rim Burandt
Micki and Dan Carter
Sandi and Rocker Channell
Marie and Jeffery Counts
Ted Davis III
Mary Jo and Christopher Dooley
Chip Evans Construction, Inc.
Misty Leigh Williams and Marty Fitzjurls
Nancy and Michael Fixx
Ellen Fleming
Amy and Mark Fritchman
Janet and Chris Gerhart
Stacy and Michael Gowen
Angela and Kent Harrison
Carlton Herrin
Loretta and Ladell Jackson
Barry and Jim Kaminer
Linda and Buddy Knight
Jennifer Leavy
Margot and Brantley McMinn
Kim and Tom Meadows



Bob Meek
 Kristen and Gregg Moore
 Kelly and Steven Morgan
 Aaron Moyer
 Stacie Moyer
 Pam and Randy Myers
 Susan and Don Myers
 Dorothy and Don O'Quinn
 Debbie and Jon Osgood
 Janine and Chris Pappalardo
 Nikki and Chris Pope
 Olympia and John Poulakis
 Beth and Ken Quinn
 Theresa and Omar Rana
 Riley and Alfred Sams
 Howard Seymour
 Ashly and Ray Shingler
 Peg and Nick Shorey
 Melissa and Jon Simmons
 Victoria and John Simms
 Marybeth and Scott Steilen
 Tracey and Jonathan Tennant
 Bess and Shannon Thompson
 Elizabeth and David Thompson
 Ashley and George Tindle
 Kerrie and Thomas Todd
 Gina and Jim Wiertelak

2017 Booster Club Golf Tournament Supporters

Arline & Wiggins
 The A/C Guys
 Altama Discount Pharmacy
 Bart Barton
 Beachview Event Rentals & Design
 Stephen R. Been
 Brunswick Floors
 Buccaneer Farms
 B&B Solutions
 Canal Road Self Storage
 Vassa Cate
 Coastal Oral Surgery
 The Coastal Bank of Georgia
 Susan and Dan Duffey
 Emerald Princess Casino
 Kathryn and Mike Freidl
 Lewis Glenn
 H&H Lifestyles
 Harrison Design
 William Headley
 Steve Holt
 James Isaac
 Ben Lee
 Marshland Credit Union
 Marshside Grill
 McGinty-Gordon & Associates (Richard Russell)
 OrthoGolfer.com
 Yvonne Pappalardo
 Parker's Village
 Ponsell Heating and Air
 Andrew Posavetz
 Robert Posavetz
 PrimeSouth Bank
 Don Robinson
 South Coast Bank & Trust
 Southeast Georgia Health System
 Southern Eagle Distributing
 Anita and Gary Wilt

FREDERICA ACADEMY GIFT POLICY

Purpose and Scope

As a coeducational, nondenominational, independent, college preparatory day school offering the highest quality education for students of all races, creeds, and nationalities, and as a not-for-profit organization exempt from federal income tax liability by Internal Revenue Code section 501 (c)(3), Frederica Academy qualifies as a public charity under Internal Revenue Code section 509 and is incorporated under the laws of Georgia. Frederica Academy is committed to serving the interests of its stakeholders by:

1. Maintaining confidentiality throughout the entire giving process. Unless otherwise agreed to by the Head of School and the donor, pertinent information will be shared only to the extent that is necessary with professional counsel and/or designated Frederica administrators and members of the Board of Trustees.
2. Encouraging donors to seek independent professional counsel if necessary to represent their interests.
3. Resolving any potential conflicts of interest with donors or prospective donors in consultation with professional counsel.

This gift policy shall govern the acceptance or rejection of all gifts to or for the benefit of Frederica Academy.

Internal Relationships

The Head of School shall have jurisdiction with regard to the approval of all policies and procedures relating to the school's acceptance or rejection of gifts, and the terms or conditions thereof. The Head of School shall, in consultation with the Chairman of the Board of Trustees, the Director of Advancement and the Director of Finance, accept or reject all gifts and the terms or conditions of all gifts. All gifts shall be unconditional and without restriction imposed by the donor unless terms or conditions are accepted in writing by the Head of School. A gift shall not be deemed accepted by the school unless recognized in writing by the Head of School. Frederica Academy's faculty, staff, and Board of Trustees shall report all known gifts and solicitations, planned gift negotiations, and contacts with professional counsel to the Director of Advancement. The Director of Advancement shall report all substantive information to the Head of School.

Accounting Policies

Frederica Academy has adopted *SFAS 116 Accounting for Contributions Received and Contributions Made* and will record contributions as such. The school will accept readily marketable securities which may be transferred to a brokerage account maintained by the school. Any and all brokerage accounts will be established solely by the Head of School, with the prior approval of the Chairman of the Board of Trustees and the Director of Finance. For gift crediting and accounting purposes, the value of the securities is the average of the high and low on the date of the transfer to Frederica Academy. The effective date of the transfer will be determined according to the rules of the Internal Revenue Service.

Conditions of Acceptance

Frederica Academy reserves the right to decline the acceptance of any gift, or term or condition of gift, for any reason, including without limitation to those that do not further its mission or goals, or which would create an administrative burden or excessive expense to the school. All decisions to accept or decline gifts shall be made by the Head of School, in the discretion of the Head of School after consultation with the Chairman of the Board of Trustees, the Director of Advancement, and the Director of Finance. Federal tax law does not permit donors to dictate or restrict investment decisions with regard to the maintenance of irrevocable gifts. Establishment and governance of all planned and other gifts shall be in direct accordance with and subject to the applicable laws and regulations of the United States and the State of Georgia.

Confidential Information

All information obtained from or about donors, prospective donors, and gifts shall be held by the school and its representatives in confidence unless the release of information is approved by the donor, prospective donor, or legal representative of the donor or prospective donor.

Planned Gifts

Unless otherwise directed by the donor and agreed to by the Head of School as set forth above, or unless designated by the Board of Trustees, all gifts will represent unrestricted monies, except that upon receipt of a Planned Gift (as further defined herein below) of cash or cash equivalents (to include invested assets but not real or personal property), at least ten percent (10%) of said gift shall be added to the endowment, with the balance to be utilized for the benefit of Frederica Academy at the discretion of the Head of School. The term "Planned Gift" as used in this paragraph shall include only gifts in trust, testamentary gifts received from the estate of a donor, gifts received from the designation of the school as a beneficiary on a life insurance policy or retirement account, retained life estates, and other gifts designated by the Head of School as a planned gift.

Professional Relationships

Frederica Academy will seek qualified professional counsel in the exploration and execution of all planned giving agreements and as necessary for all other type of giving opportunities. Donors will be responsible for seeking independent professional advisors to represent the interests of the donor.









FREDERICA ACADEMY

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