

2024 Local Community Grant Recipients Northern Region

Northern Region includes the following states: IA, ID, IL, IN, MI, MN, MT, ND, OR, SD, WA, WI, WY

Grant Recipients are listed below in alpha order of their state

We salute the following financial professionals, staff members and home office employees for volunteer work in their local community! Those listed below applied for grant to a qualifying charity from the Osaic Foundation during its 2024 funding cycle in March 2024. Applications were evaluated by a committee of advisors, employees and members of the Foundation Board. Grants were awarded on the basis of factors including the level of sustained, hands-on volunteerism by the applicant and the overall purpose, outcomes and mission of the charity.

Nominator Charity Website The Historic General Dodge House Becky has volunteered for two years training as a docent, giving tours and describing the home and the life of General Dodge and his family to visitors. **Becky Bentz** This arts and culture association non-profit Sr Ops Processing Specialist/Account received a grant of \$500 Maintenance. Osaic Wealth Iowa **Dunkerton Historical and Tourism Assn** LuAnn has volunteered for two years as a board member, social media manager and helping with marketing and promotion to help preserve local history with a museum and an education village with 2 one room school houses, train depot and small outdoor amphitheater.. **LuAnn Chapman Gatts** Financial Advisor/Securities America lowa This arts and culture association non-profit received a grant of \$350

Nominator Charity Website **Camp Hot Shots** Mike has volunteered for 3 years at this camp for children ages 6-11 with Type 1 Diabetes. Since the camp is run solely by volunteers, everything needs to be done. The medical professionals take care of injections and testing blood sugar levels as well as any medical emergencies, however there is supervision needed, counselors, drivers, etc. that needs to be covered. The mission of Camp Hot Shots is to empower youth to Mike Sandoval A Champion In Every Child understand and manage diabetes through self-Windows Systems Administrator management and become self-disciplined and Osaic Wealth responsible. Iowa This health and human services non-profit received a grant of \$1,250 **CTK Life Recovery** Allison was part of the start-up of this non-profit three years ago and each week helps prepare meals and multimedia for attendees She occasionally does the motivational speaking portion of these sessions. She also manages and regulates the group's Facebook page as well its communication materials. CTK provides resources to individuals struggling with all forms of **Allison Smith** addiction and substance abuse by providing a safe Marketing Project Manager, space for those in recovery to receive support and Highland Capital guidance. Idaho This health and human services non-profit received a grant of \$1,500 **Arlington Heights Thunder Fastpitch** For 5 years, Brian has volunteered at this regional travel girl's softball program most recently as a coach for two teams. Additionally, he helps in a variety of other tasks. In season he devotes roughly 35 hours per week and offseason about 5 hours per week. **Brian Carlson** This civic association non-profit received a grant of \$625 Alera Group Illinois **Lombard District 44 Education Foundation** Mohammed has volunteered with the non-profit for four years and currently serves as the president. Taking over after Covid, Mohammed has taken charge of recruitment LOMBARD and re-establishment of the foundation. It serves as a strategic partner with the district to foster connections between the classroom and local community. They strive to provide students and teachers with community-based learning projects. **Mohammed Esmail** Esmail Financial Strategies/Woodbury Financial This education services non-profit received a grant of

\$1,000

Illinois

Nominator	Charity	Website
James Kim The Pinnacle Planning Group, LLC/Triad Advisors Illinois	New Community Outreach James has volunteered for the non-profit for 8 years and became a board member last year. His responsibilities over time have included helping with the garden that provides free fresh produce to the community, and assisting with the annual back to school funfair. The community-based non-profit is committed to Bronzeville's youth and community to create restorative spaces for healing, reconciliation, and growth. This health and human services non-profit received a grant of \$2,000.	new c*mmunity OUTREACH
Gary Lundberg Service 1 Financial Group Illinois	Rockford Reachout Jail Ministry For 6 years, and about 60 hours a quarter, Gary has been a community volunteer and organizer of quarterly counseling retreats in the county jail for inmates open to mentoring to address their drug addiction and reform of their criminal behavior through seeing models of better life choices. This health and human services non-profit received a grant of \$1,000.	REACHOUT'
Sharon Negris RPI-Retirement Planners Intl. Illinois	A Drop in the Desert Sharon is a founding member of this charity where she has volunteered the past 4 years at events and on its Board of Directors. The organization connects farmfresh, local produce to people living in food deserts in Chicago or other in-need communities who desire to make health-conscious dietary choices. This health and human services non-profit received a grant of \$1,000.	YX
Alan Nerad Alera Group/Triad Advisors Illinois	Lincolnshire Rotary Charitable Fund, Inc. Alan has volunteered with the non-profit for 21 years and has served as the president of the organization multiple times. The organization initiates and supports humanitarian efforts with the local community and internationally, including the Rotary Foundation, the Riverside Foundation, Shore Community Services, CASA, and Alzheimer's Association. This civic association services non-profit received a grant of \$1,000.	Rotary Lincolnshire Morning Star District 6440 Illinois · USA

Nominator	Charity	Website
Alan Nerad Alera Group/Triad Advisors Illinois	Northeast Illinois Council, Scouting America Alan has been involved with the charity for 20 years and currently serves as the treasurer for Troop 78 boys and Troop 78 girls in Lincolnshire, IL. He is also a Troop committee member. The group prepares young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Law. This civic association services non-profit received a grant of \$1,000.	Scouting America Northeast Illinois Council
Kelly O'Malley Oak Brook Wealth Management Illinois	Marklund Children's Home Kelly has volunteered her time for three years with the non-profit. Their mission is to make everyday life possible for individuals with profound disabilities. Kelly has demonstrated a canine companion at the home and has brought joy to the residents, both adults and children in the community. This health and human services non-profit received a grant of \$1,000.	Eloomingdale Elgin Geneva IL
Kenneth Pawula Pawula Financial Group/Osaic Wealth Illinois	Saint Vincent de Paul of St. Mary Ken has volunteered for eight years with this charity, assisting with food distribution events and fundraisers. The group has offered direct aid to those in need across two counties in the Chicago Northwest suburbs for over 60 years. Programs and services help families address the underlying root causes of their basic unmet needs, including food, rental and utility assistance, all aimed to empower & help them build a life free from poverty. This health and human services non-profit received a grant of \$2,500.	SOS CONTRACTOR CROSS
Kenneth Pawula Pawula Financial Group/Osaic Wealth Illinois	Chicago Zoological Society Ken has been an associate with the Junior Board and has also volunteered with the KINGS program and holiday events for four years. The society teaches zoo guests how interlinked humans are with other creatures and environments in the world. They strive to encourage people to take informed, responsible environmental actions to preserve biodiversity for generations to come. This civic association services non-profit received a grant of \$825.	BROOKFIELD

Nominator	Charity	Website
Dale Tieman Peru Federal Savings Bank/Osaic Wealth Illinois	LaSalle Fireman's Association For more than 30 years, Dale has volunteered at various fundraising events for the association to help it purchase equipment in support of its first responder mission to protect the lives and property of all residents and visitors in the City of La Salle, Illinois, and apply full use of available resources in the mitigation of all disasters either natural or man-made. This civic association services non-profit received a grant of \$4,000.	LA SALLE FIRE DEPT.
Joseph Velez JPV Financial/Osaic Wealth Illinois	Grayslake D127 For four years Joe has volunteered at the school as a guest speaker in the Personal Finance Class, participated in mock interviews, and given an introduction to finances for students as part of career exploration; he has also hosted internships for students at his practice. The school notes, "learning from a professional instead of reading about it sparks students' curiosity, provides collaboration through mentorship and highlights the need to be invested in our community." He also "inspires and challenges teachers to have a REAL curriculum. The impact is on both teachers and students." This education non-profit received a grant of \$1,000.	19 GRAYSLAKE 47
Joseph Velez JPV Financial/Osaic Wealth Illinois	Grayslake Youth Baseball Association (GYBA) Joseph has volunteered as a special advisor to the board for six years and has coached over 12 seasons of baseball, and serves as the Mustang Director and Travel Director for Grayslake Youth Baseball. The community-focused organization supports the development of youth, both on and off the field. They teach sportsmanship, teamwork, inclusivity, community, and diversity and prioritize the player experiences and development over all other outcomes. This civic association services non-profit received a grant of \$350.	GYBA
Stacey Bouse Wealth Strategies Inc/Osaic Wealth Indiana	The Soup Kitchen of Muncie Stacey has volunteered at the non-profit for the past 2 years, preparing meals and washing dishes each week. The soup kitchen feeds the hungry of the Muncie community with dignity and respect. They ensure that all people can access healthy food and make connections with community services to support their social and emotional wellbeing. This health and human services non-profit received a grant of \$825.	SOUP KITCHEN of MUNCIE

This health and human services non-profit received a grant of **\$825**.

Nominator	Charity	Website
Alexander Sulanke Wealth Strategies Inc./Osaic Wealth Indiana	Home Savers of Delaware County Alexander has volunteered here for five years, 3-4 hours per month and is a Board Member. The group makes urgent repairs and accessibility improvements for lowincome homeowners in Delaware County, such as HVAC, plumbing, and roofing repair and replacement. Accessibility improvements such as entry/exit ramps, stairs and railings, tub-to-shower conversion. This health and human services non-profit received a grant of \$1,000	Home Savers of Delaware County
Jeffrey Bearance Michigan Financial Companies/Osaic Wealth Michigan	Elizabeth's Closet Jeffrey as volunteered for the past five years with any duties assigned, primarily obtaining items for silent auctions, fundraising, and advertising. The non-profit raises funds to assist the Beaumont Infant Bereavement Program, which creates memory boxes that are given to parents who are dealing with the loss of a child. They also support those who need ongoing grief counseling. This health and human services non-profit received a grant of \$625	Elsabeth's Obs
Mark Drouillard Wealth Management Plus/Osaic Wealth Michigan	Therapy Ranch Mark has volunteered with the non-profit for five years, about 10 hours per month, managing their budgets and finances, and by fundraising and performing maintenance at the horse facility. The non-profit assist U.S. Veterans and metro Detroit youth with equine assisted mental health therapies. This health and human services non-profit received a grant of \$1,000.	Therapy ** RANCH
Dennis Hesselink Encore Financial Group Michigan	McLaren Northern Michigan Foundation Dennis has volunteered with the non-profit for seven years in board positions, 12 hours per month, assisting with administration and public events. The Foundation receives and administers funds to support the mission of McLaren Northern Michigan Hospital and its support programs that enhance the well-being of the community. This health and human services non-profit received a grant of \$2,000	McLaren NORTHERN MICHIGAN FOUNDATION

Nominator	Charity	Website
Iuliana Keyes VIM Capital/ Osaic Wealth Michigan	ArtLab J This was a double nomination from Iuliana, who has volunteered for five years at ArtLab J, and Daniel, whw has volunteered there for two years. The organization helps people and children from the Detroit Public Schools have exposure to arts, dance and STEM. Its programs are dedicated to breaking down barriers and fostering inclusivity within the arts as a champion of community engagement and social justice within the Detroit cultural landscape.	ArtLab J
Daniel P. Thomas Jr. Thomas Financial Group / Osaic Wealth Michigan	This education, arts and culture non-profit received a grant of \$1,000	
Joel Mischley Operations Processing Specialist Osaic Michigan	Quality Deer Management Association Joel is an eight-year volunteer and former board member, assisting with all information technology (FB, website, etc) needs of the group along with any other needs. The conservation organization is dedicated to safeguarding the future of white-tailed deer and their environments by offering education, conducting research, and advocating habitat management, It promotes responsible deer stewardship, thriving ecosystems, and elevates the quality of deer populations for future generations. This civic association received a grant of \$350	
Judith Saari VantagePointe Financial Osaic Wealth Michigan	Mobile Meals of Marshall, Inc. Judith is six-year volunteer and has served a s driver and board member, delivering meals to low income and homebound seniors 2-4 hours a week. The charity supplies nutritionally balanced meals to those persons unable to prepare meals for themselves, as well as human contact to those that may be alone. This health and human services non-profit received a grant of \$1,825	mobile meals

Nominator	Charity	Website
	BestPrep	
Rick Anderson Regional Supervision Manager Field Supervision, Osaic Minnesota	Best Prep was nominated by Rick Anderson, who has been involved with the charity for the past 12 years as a resident business leader and as a member of the advisory committee. The organization prepares students with business, career, and financial literacy skills through hands-on experiences that inspire success in work and life. Rick teaches and mentors high school age students in financial literacy, business applications and life lessons. This education-related non-profit has received a grant of \$1,000	bestprep
Nicole Brunner Director, Ops Processing Osaic Minnesota	National Multiple Sclerosis Society Nicole has volunteered her time and expertise for eight years to support her local walk-a-thon, aimed at raising funds to set the world free from Multiple Sclerosis, and empowering people affected by MS to live their best lives. This health and human services non-profit received a grant of \$500	National Multiple Sclerosis Society
Rachel Erickson Field Supervision Analyst Osaic Minnesota	Ann Bancroft Foundation Rachel has volunteered for two years as a committee member and fundraising team member, helping with setup for events, four hours weekly JanApril. The Ann Bancroft Foundation supports girls to live their dreams and imagine something bigger through grants, mentorship and ongoing development opportunities to Minnesota girls in Kindergarten through 12th grade. This health and human services non-profit received a grant of \$625	Ann Bancloft FOUNDATION
NO PHOTO AVAILABLE Anna Graves Osaic Wealth Minnesota	New Hope For Families A three-year volunteer, Anna is a member of the New Hope For Families Parents Group, collecting clothes for its Kids Closet, and joining the office staff in painting/fix-up projects at their building. The group serves all of those impacted by the foster care system in the local community including children and also the foster parents and biological parents to create "New Hope" for all of those involved. She has also helped provide respite foster care. This health and human services non-profit received a grant of \$2,000	NEW HOPE FOR Families

Nominator	Charity	Website
	Feed My Starving Children (FMSC)	
Jayme Hall Supervisor - Supervision Administration Osaic Minnesota	Jayme has led site EAC group team efforts in Oakdale for many years to help the local FMSC fulfill its commitments to build meal packs at its warehouse. Its mission is to eliminate child malnutrition worldwide while providing meaningful service opportunities for volunteers in the U.S. This health & human services non-profit received a grant of \$1,000	FEED MY STARVING CHILDREN
	Save-A-Bull	
Ruby Holmgren Advisory Services Associate Osaic Wealth	Ruby has volunteered for a year, bringing puppies and dogs to events when their fosters are unable to attend. She speaks to potential adopters and makes sure the dogs are socializing. Save-A-Bull is dedicated to the rescue of pit bulls from homelessness, neglect, injury and abuse. Save-A-Bull also promotes spay/neuter initiatives to decrease pet overpopulation. This civic association received a grant of \$350	* MINNESOTA
Minnesota	This civic association received a grant or \$330	
	United Way of Douglas & Pope Counties Timothy has volunteered with the monthly food drop of the non-profit for four years, about 12 hours per month. He also coordinates the setup for Back Pack Attack in Pope County and serves on their allocation committee. The non-profit changes the game by connecting people, resources, and ideas to promote individual self-sufficiency through investments in health, education, and financial stability.	United Way United Way of Douglas & Pope Counties
Tim Johnson Osaic Wealth Minnesota	This health and human services non-profit received a grant of \$2,000	
Jim Letourneau Manager, Transitions Processing Osaic Minnesota	Northern Star Council, BSA #250 Jim has served for 30 years, 3-4 hours a week, as a Cubmaster, Den Leader, and as Unit Committee Chair for the local unit guiding youth in dens, packs and troops. He also serves on a council committee providing mentorship to youth leaders developing programs and offering servant leadership opportunities to our members. The mission of Northern Star Scouting is to "Prepare young people in a safe and inclusive environment to be leaders and individuals of strong character." This civic association received a grant of \$1,000	

Nominator	Charity	Website
Michelle (Shelly) Lindsey Central Choice Financial Osaic Wealth Minnesota	Pohl Children's Scholarship Foundation Over the past two years Shelly has served as a Board Member and volunteer for a variety of fundraisers and events. She also leads the virtual Forever Family Grief & Support Group, and organizes the Forever Loved Motorcycle ride including developing marketing & communication strategies to enhance visibility for the foundation. The charity provides support and services to children and families who have experienced the loss of a child or parent, and to provides a quality-of-life experience to children with life-threatening illnesses while supporting the entire family. This health & human services non-profit received a grant of \$2,000	POHL CHILDREN'S FOUNDATION
Keith Meyers Advanced Financial Consultants Osaic Wealth Minnesota	John Burch Park Supporters Keith has volunteered at the non-profit for 23 years and serves as the secretary and fundraising chair. This non-profit strives to maintain and improve the John Burch Park ballpark and facility. This park is one of the hubs of the Cannon Falls Community where high school, legion, VFW and Bears baseballs games are hosted in the spring and high school football games in the fall. This civic association non-profit received a grant of \$1,000	
Jacci Miller Relationship Case Manager Highland Capital Brokerage Minnesota	Immanual Baptist Tabernacle (Sisters Transforming Program) Jacci has volunteered here for seven years, serving about 10 hours per month. The organization sponsors a program that provides a separate space and opportunity for women coming out of drug rehab and incarceration to grow in life skills. It serves women with drug addiction and/or incarceration history. This health & human services non-profit has received a grant of \$1,000	IMMANUEL Baptist Tabernacle
Joseph Mulheran Sales Vice President Highland Capital Brokerage Minnesota	The BeliEve Foundation Joseph has volunteered with this non-profit the past year, aiding its programs where needed and assisting with fundraising efforts. The charity assists grieving families with overcoming financial hardship related to the loss of a child. This health & human services non-profit has received a grant of \$1,000	The Beli <mark>&ve</mark> Foundation

Nominator	Charity	Website
Jessica Orval Finance Analyst II, Osaic Minnesota	Junior Achievement Jessica coordinates volunteer opportunities on behalf of the EAC for employees to spend a day helping children in grades K-12 navigate a day as they perform jobs and learn about financial responsibilities. JA programs align to three pathways: Financial Literacy, Career Readiness, and Entrepreneurship. This education-related non-profit has received a grant of \$1,000	Junior Achievement [®]
Denise Rich USAdvisors Wealth Management Osaic Wealth Minnesota	Our Lady of Peace Hospice Care Denise has volunteered for two years, 3-4 hours per shift twice a month washing dishes and delivering meals to residents. The charity gently comforts and cares for those most in need near the end of their lives, wherever they call home, regardless of means. This health & human services non-profit has received a grant of \$1,000	Our Lady of Peace HOSPICE & HOME HEALTH CARE
Mark Swenson Osaic Wealth Minnesota	Valley View Nursing Home Foundation of Houston MN Mark is a three-year volunteer here and current board chair, serving 3-4 hours per month to plan, coordinate, and volunteer time to raise funds for local long-term care facilities. The Foundation assists tax-exempt organizations who serve elderly residents of Southeastern Minnesota by making contributions to Valley View Healthcare & Rehab of Houston, MN, to further educational opportunities and activities related to the care and treatment of elderly residents. This health & human services non-profit has received a grant of \$2,000	Valley View HEALTHCARE & REHAB Where your diguity and care come first
Lee Underdahl Finance Manager, Osaic Minnesota	Twins Cities Habitat for Humanity Teams from the Oakdale site and the national Finance team jointly sponsored this grant, with plans that teams would conduct an onsite volunteer event in 2024 as in past years. Twin Cities Habitat for Humanity is committed to advocating for affordable homeownership – because homes and families are the foundation of successful communities. This health & human services non-profit has received a grant of \$2,500	Twin Cities Habitat for Humanity®

Nominator	Charity	Website
David Mann LifeGuide Financial Consultants Osaic Wealth Minnesota	Fargo Area Sports David volunteered for the non-profit for five years, 5-7 hours per week, serving on its board and has volunteered as a coach. The non-profit serves the community by basing every decision on kids first, coaches and parents second, followed last by the needs of the organization. They build a passion for sports, building good people, and providing a competitive and safe environment for the athletes. This civic association non-profit received a grant of \$825	FARGO AREA SPORTS
Roxanne Waterman Waterman Wealth Strategies Osaic Wealth Oregon	Soroptimist International to The Americas Inc Roxanne has held several board member positions over the 12 years, serving about 3 hours per week with the non-profit. She is a charter member and promotes the vision of the non-profit, which is for women and girls to have the resources and opportunities to reach their full potential and live their dreams by providing educational programs, supporting women's shelters, and providing awareness to combat the issue of human trafficking. This civic association non-profit received a grant of \$5,000.	
NO PHOTO AVAILABLE Kathy Wilson Osaic Institutions South Dakota	Border Paws Dog Rescue Kathy has volunteered at this non-profit two-to-three times a week for the past two years. The non-profit is focused on saving dogs from very over-populated areas of the south and finding them a forever home after being vetted. They also educate the local community on dog rescue and adoption. This civic association non-profit received a grant of \$500.	Border Paws Pondrofit organization
Layne Bruner Harbor Investment Advisors Osaic Wealth Washington	Multi-Sport 360 Layne founded the non-profit two years ago and serves as the president. The community program serves small town suburban communities and surrounding rural communities, most of which fall below the poverty line. It offers a local and reasonably priced option for training young athletes to develop life skills through sports. This civic association non-profit received a grant of \$2500.	MULTI-SPORT

Nominator	Charity	Website
Nicole Bradford-Albert FSA Supervisor, Osaic Wealth Wisconsin	Coco's Heart Dog Rescue Coco's Heart Dog Rescue was nominated by Nicole Bradford-Albert, who has volunteered at the charity for the past 5 years, fostering pets, organizing supplies, and assisting with fundraising. The organization is a volunteer-driven animal rescue that is dedicated to rescuing and rehabilitating pets and helping them find their forever homes. This civic association non-profit has received a grant of \$350	COCO'SHEART DOGRESCUE
Nicole Bradford-Albert FSA Supervisor, Osaic Wealth Wisconsin	Relay for Life of River Falls – Pierce County WI (Local Chapter) In honor of her mother, a two-year cancer survivor, Nicole has volunteered for two years with her local Relay for Life event, which aims to serve all local cancer patients and their caregivers with services and resources that may help in their cancer journey. The American Cancer Society mission is to improve the lives of people with cancer and their families through advocacy, research, and patient support, to ensure everyone has an opportunity to prevent, detect, treat, and survive cancer. This health & human services non-profit has received a grant of \$350	RELAY FOR LIFE American Society
Gillian Ward Portfolio Coordinator/Osaic Wealth Wisconsin	Underdog Pet Rescue of Wisconsin, Inc. Gillian has volunteered for a year now as both an Adoption Follow Up Admin and Event Volunteer. She contacts adopters after 1 week and then at 3 months to see if they need aid, answers their questions, and connects adopters with others as needed. She also helps at fundraising events. This civic association non-profit has received a grant of \$500	UNDERDOG PET RESCUE OF WISCONSIN
Dan Weber Osaic Wealth Wisconsin	FIRST Robotics, Fond du Lac High School Dan has volunteered for 11 years as a mentor with the Fond du Lac area schools high school robotics teams. As a former engineer, he mentors high school students as part of the FIRST Robotics FRC competition. From January through April, it is approximately 20-30 hours per week. FIRST Robotics prepares young people for the future through a suite of inclusive, team-based robotics programs for ages 4-18 (PreK-12). This civic association non-profit has received a grant of \$1,000	FORDY

Nominator	Charity	Website
	Casper Family YMCA	
	Kendall has volunteered with the nonprofit for ten years and sits on the board of directors. He has also served as the board president. The non-profit works to address critical needs that help children develop into smart, resilient adults, and to improve the health of those in the	FOR YOUTH DEVELOPMENT * FOR HEALTHY LIVING FOR SOCIAL RESPONSIBILITY
Kendall Bryce	community.	
Pronghorn Wealth Management Osaic Wealth Wyoming	This civic association non-profit received a grant of \$825.	