GIVE BIG
GIVE BOLD

WHAT DO YOU WANT YOUR LEGACY TO BE?
Jeff Chaddock, Child of Appalachia
board member

JEFF CHADDOCK ANNOUNCED HE WILL LEAVE 97% OF HIS ESTATE TO NONPROFITS AND HE IS CHALLENGING YOU TO LEAVE A GIFT BEYOND YOUR LIFETIME.

What do you want those who love and know you to say about you when you’re gone?

As a financial advisor, this is a question Jeff often asks his clients and others who are planning their estates. Jeff calls it the eulogy test.

“A eulogy should reflect your passion, your obsession, your drive,” says Jeff. “By planning for gifts through your will, the integrity of your life is not broken by death. Your life’s work and passion don’t have to stop. I want people to know that it’s okay to plan for their death early.”

Jeff, who recently turned 50, regularly preaches to his clients the importance of beginning the estate planning process early and to maintain it as their lives evolve.

With a few questions and simple math, he demonstrates to clients that they can take care of their family and continue to support the causes they loved in life.

“I don’t care how large or small the amount, but to orchestrate your planning and your giving is critical,” he says. “Without it, you’re in essence negating or reducing your life’s work to not being important. Why wouldn’t we take the same care of our death as we do everything else in our life?”

SUPPORTER HEART. CEO MINDSET

This commitment to helping others save and plan blossomed in Jeff at an early age. Growing up in Belpre, Ohio, Jeff became keenly aware of the financial struggles many families in his hometown faced on a daily basis, including those of his own hardworking, middle-class adoptive parents.

If you made a dollar, you spent a dollar or a dollar fifty,” he says. “I knew I wanted to do everything I could to avoid living like that, having what I call a conflict with money.”

He began saving half of what he earned mowing 21 lawns a week and bought his first stock at age 14. His parents took him to a Prudential office, where a female stockbroker agreed to help the teen learn about investing. A career in finance was born and Jeff now helps others plan their futures.

“I believed that, as a professional, if I could maintain a posture of 51 percent the heart of a social worker and 49 percent the mindset of a CEO, good things would happen,” says Jeff.

A FOUNDATION OF TRUST

Professional success and recognition as a financial advisor quickly came Jeff’s way. As leader of The Chaddock Group, he has been ranked in the top 1% of Ameriprise Financial’s 10,000 advisors for the past 20 years. And though he’s lived in big cities and has traveled the world, he always carries Appalachia in his heart.

His love for the region led him to the Foundation for Appalachian Ohio. With the Foundation, Jeff has found a philanthropic partner with whom he can trust his life’s passions.

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Social worker, CEO mindset

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THE JEFFERY CHADDOCK AND MARK MORROW GIFT

Through their planned gift to the Foundation, Jeff and Mark will continue to support the causes and institutions they’re passionate about for generations to come. With their one gift to the Foundation, they will forever support:

- Athens-based nonprofits and causes:
  - The Dairy Barn Arts Center
  - The Southeast Ohio History Center
  - The Jeff Chaddock Scholarship for Appalachia at Ohio University
  - The Kennedy Museum of Art at Ohio University
  - The Ohio University Press
  - Animal welfare in Athens
- The Foundation for Appalachian Ohio with the gift of the historic Zenner House, that will be used as a resource for enriching the region’s quality of life through events, retreats and meetings, and for honoring philanthropists and emerging leaders in the region, including through the Chaddock Award for Philanthropist of the Year

JOIN US IN ACCEPTING THE CHALLENGE BY MAKING A DIFFERENCE IN WHAT’S CLOSEST TO YOUR HEART.