



FOUNDATION FOR
APPALACHIAN OHIO
Give. Grow. Create.



GIVE BIG GIVE BOLD

WHAT DO YOU WANT YOUR LEGACY TO BE?



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



Jeff Chaddock, Child of Appalachia and Foundation for Appalachian Ohio board member

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.

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"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?"

SOCIAL WORKER 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.

"The Foundation eases my stress about giving," he says. "There's no ego or competitiveness

WITH THE FOUNDATION, JEFF HAS FOUND A PHILANTHROPIC PARTNER WITH WHOM HE CAN TRUST HIS LIFE'S PASSIONS.

that you sometimes find with foundations or nonprofits. I can breathe freely as an investor because they share my passion for the region, and as a financial advisor because they're efficient, thorough, and cost effective."

Jeff and his partner Mark Morrow also appreciate the flexibility of the Foundation, which allows investors to tailor their giving to reflect their wishes and what's in their hearts.

"The Foundation provides investors a kaleidoscope through which you can see unlimited opportunities and ways to give," says Jeff. "That felt right to us because it allowed us to be a part of the Foundation's mission to create opportunities in Appalachian Ohio, while focusing our giving on the organizations we're so passionate about."

THE FOUNDATION PROVIDES INVESTORS A KALEIDOSCOPE THROUGH WHICH YOU CAN SEE UNLIMITED OPPORTUNITIES AND WAYS TO GIVE

Through their planned gift to the Foundation, Jeff and Mark will continue to support the causes and institutions they're passionate about for decades to come. From their generosity,

students will pursue their dreams through scholarships to Ohio University, works by Appalachian writers and scholars will be published and shared, arts and culture will continue to grow and enchant, and innovation will flourish.

A LIFE OF SHARED GIVING

Mark Morrow, Jeff's partner of 27 years, shares Jeff's devotion to philanthropy. He is deeply involved in the 9/11 Memorial Museum in New York City, where he and Jeff have a home. And though he is not a native of Appalachia, he shares Jeff's appreciation for the region.

"We are always interested in giving to those organizations that have been left out," says Mark. "Giving back is so rewarding that the more you do, the more you want to do."

Jeff and Mark invite us all to shine a spotlight on the organizations in Appalachian Ohio that we love and to give more by working with the Foundation to include our favorite nonprofits in our estate plans. They challenge us all to give boldly with intention — and to follow our hearts.

JEFF'S CHALLENGE TO US ALL

Jeffery Chaddock, along with his partner Mark Morrow, has generously gifted 97 percent of his estate to the Foundation.

Jeff and Mark want to challenge others to be as thoughtful and bold in their estate planning, and encourage all of us to give a gift of any size through the Foundation to benefit Appalachian Ohio. To up the ante, Jeff invites those who can do so to give 51 percent or more of their estate.

This challenge is also extended to the Foundation to encourage others to pledge to invest in the prosperity of the region.

Will you accept the challenge?



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**



The Historic Zenner House

Jeff and Mark's home in Athens, Ohio, was designed in 1927 by architect Brandon Smith, who specialized in museum and library design. Through their gift, the Zenner House will become a resource for the Foundation.

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

