

# *Wisconsin Lions*

## *Birch-Sturm Fellowship*

The Birch-Sturm Fellowship was created to honor those individuals who exemplify undying dedication and commitment to Lionism. The Fellowship is named after Wisconsin's only two International Presidents - Frank V. Birch and Clarence L. Sturm



*Frank V.  
Birch*

1924	Joined the Milwaukee Central Lions Club
1929-30	District Governor
1931	Elected to International Board of Directors
1934	Elected Third Vice President
1937-38	President of Lions International



*Clarence L.  
Sturm*

1929	Joined the Manawa Lions Club
1941-42	District Governor
1948	Elected to International Board of Directors
1956	Elected Third Vice President
1959-60	President of Lions International

The Birch-Sturm Fellowship is a way for districts, clubs or individuals to honor a person who displays dedication and commitment to Lionism.

In order to become a Birch-Sturm Fellow, a district, club or individual must donate \$1,000 to the Wisconsin Lions Birch-Sturm Memorial Fund, Inc.

### *The Birch-Sturm Fellow will receive:*

- Lapel pin •Plaque •Patch
- Name inscribed on the Master Plaque, honoring all recipients- located at the Wisconsin Lions Foundation Office.

### *Multi-Level Fellowships*

Once a recipient has received the initial award, Multi-Level Fellowships are available in \$1,000 increments. For each additional \$1,000, a recipient will receive a diamond added to their lapel pin and a star added to their name on the Birch-Sturm Master Plaque.

### *Monies Are Used For*

All revenue received from the Birch-Sturm Fellowship Program is placed into the Birch-Sturm Memorial Fund. Currently, only interest from the Fund is used to support the operating budget of the Wisconsin Lions Foundation.

### *A Special Note*

This donation should be over and above a club's Annual Donation to the Wisconsin Lions Foundation, Inc.

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# Presidential Message

Gary L Colton, President



It is my privilege, as President of the Birch-Sturm Memorial Fund (BSMF), to update the Lions of Wisconsin on the movement of the Fund over this past year. We have come a long way from our Incorporation date of April 26, 2011. I would like to thank my predecessors, Lions Eric Ender and Glen Moegenburg, for their leadership. Also, I would like to thank all the members of the Board that I had the pleasure to work with over the past three years.

The Birch-Sturm Memorial Fund Board has completed its set of policies this past year that will help serve future boards. We have created a Pledge Agreement that provides guidelines for donors who wish to pay the \$1,000 for a Birch-Sturm in installments.

After continuing discussion regarding how we can be more visible to the Lions and Lioness, the Board voted to have a table top display created to take to all Conventions and to have a website created for the BSMF, as well. Both were accomplished and the display board has been at those District Conventions that were held in 2015 and the website for the BSMF is [birchsturm.org](http://birchsturm.org). I would like to thank Cecily Filtz, Public Relations Manager of the WLF, for all her help and hard work on the creation of the table top display and website.

The BSMF main source of funding is the purchase of a Birch-Sturm Fellowship. There were 97 Fellowships awarded this last calendar year. The Birch-Sturm Fellowship is one way for clubs to honor anyone, living or deceased, who has displayed dedication and commitment to the Lions motto "We Serve". As of February 28, 2015, the market value of the fund was \$4,674,732.16 and the Board is always looking at ways for potential growth of the fund while staying with our investment goal of preserving the real value of the fund's capital while achieving an income stream from it.

I believe that the Birch-Sturm Memorial Fund will continue to be a valuable asset to the Lions of Wisconsin in helping to preserve our long range plan of giving those children with disabilities a camping experience that will stay with them for the rest of their lives.

# Financials

# Independent Auditor's Report

Board of Directors  
Wisconsin Lions Birch Sturm Memorial Fund, Inc.  
Rosholt, Wisconsin

We have audited the accompanying financial statements of the Wisconsin Lions Birch-Sturm Memorial Fund, Inc. (Organization), which comprise the statements of financial position as of December 31, 2014 and 2013, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

## ***Management's Responsibility for the Financial Statements***

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

## ***Auditor's Responsibility***

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting principles used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

## ***Opinion***

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Wisconsin Lions Birch-Sturm Memorial Fund, Inc. as of December 31, 2014 and 2013, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

**KerberRose SC**  
**Certified Public Accountants**  
February 23, 2015

**WISCONSIN LIONS BIRCH-STURM MEMORIAL FUND, INC.****Statement of Activities  
For the Year Ended December 31,**

	<b>2014</b>	<b>2013</b>
<b>REVENUES AND OTHER SUPPORT</b>		
Memorials	1,100	495
Birch-Sturm Fellowships	109,950	128,271
Interest and Investment Income	103,647	93,079
Net Realized and Unrealized Gain on Investments	174,867	463,056
<b>Total Revenues and Other Support</b>	<u>389,564</u>	<u>684,901</u>
<b>EXPENSES</b>		
Program:		
Office Supplies	229	112
Printing	294	1,175
<b>Total Program Expenses</b>	<u>523</u>	<u>1,287</u>
Management and General:		
Professional Fees	6,735	5,354
Administrative Fees	3,063	3,377
Plaques and Engraving	9,973	10,095
Investment Fees	29,977	28,135
<b>Total Management and General</b>	<u>49,748</u>	<u>46,961</u>
<b>Total Expenses</b>	<u>50,271</u>	<u>48,248</u>
<b>CHANGE IN NET ASSETS</b>	339,293	636,653
<b>INTEREST TRANSFERRED TO WISCONSIN LIONS FOUNDATION, INC.</b>	-	(103,224)
<b>NET ASSETS - BEGINNING</b>	<u>4,370,191</u>	<u>3,836,762</u>
<b>NET ASSETS - ENDING</b>	<u>\$ 4,709,484</u>	<u>\$ 4,370,191</u>

# WISCONSIN LIONS BIRCH-STURM MEMORIAL FUND, INC.

## Statements of Financial Position

As of December 31,

	2014	2013
<b>ASSETS</b>		
Cash	36,116	20,027
Investments	4,674,666	4,351,129
<b>TOTAL ASSETS</b>	<u>4,710,782</u>	<u>4,371,156</u>
<b>LIABILITIES</b>		
Accounts Payable	1,298	965
<b>NET ASSETS</b>		
Unrestricted	4,709,484	4,370,191
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u>4,710,782</u>	<u>4,371,156</u>

## Statement of Cash Flows For the Year Ended December 31,

	2014	2013
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>		
Change in Net Assets	\$ 339,293	\$ 636,653
Adjustments to Reconcile Change in Net Assets to Net Cash Flows From Operating Activities:		
Transfer of Interest to Wisconsin Lions Foundation, Inc.	-	(103,224)
Interest and Dividends Reinvested	(103,647)	-
Realized and Unrealized Gain on Investments	(174,867)	(463,056)
Fees Paid From Investments	29,977	28,135
Change in Operating Assets and Liabilities:		
Accounts Payable	333	136
Total Adjustments	(248,204)	(538,009)
<b>Net Cash Flows From Operating Activities</b>	<u>91,089</u>	<u>98,644</u>
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>		
Purchase of Investments	(75,000)	(120,000)
Sale of Investments	-	10,169
<b>Net Cash Flows From Investing Activities</b>	<u>(75,000)</u>	<u>(109,831)</u>
<b>NET CHANGE IN CASH</b>	16,089	(11,187)
<b>CASH - BEGINNING</b>	<u>20,027</u>	<u>31,214</u>
<b>CASH - ENDING</b>	<u>\$ 36,116</u>	<u>\$ 20,027</u>

# **Birch-Sturm Fellowships 2014**



**District 27-A1**

Allan Bassett  
 Jeff Bausch  
 George Hanacik Jr.  
 Keith Johnson  
 Clinton Karstaedt  
 Lawrence Kipfer  
 Ed Neckar  
 Thomas Pisca  
 William Pogantsch  
 Bill Radonski  
 Patricia Rossman  
 Debbie Schwanz (IMO)  
 Joan Weber

**District 27-A2**

David Antoine  
 Paul Bernard  
 Melvin Birkholz  
 Dennis Corrigan  
 Kent Ehrensberger  
 Jim Kais  
 Roger Maas  
 Ralph Schmit  
 Ronald Theisen  
 Raymond G. Vick Jr.

**District 27-B1**

Thomas R. Arens  
 Dawn Christensen  
 Mark Harn (IMO)  
 Wendy Hartmann  
 Michael Mckenzie  
 Tory Nett  
 Leander Nickel  
 Meg Post  
 Kay Quinn  
 Thomas C. Repp

James D. Schumacher

Patti Weber

Phil Weber

Peggy Zickert

**District 27-B2**

Lyle Berndt  
 Cody Bessette  
 William "Doc" Burmeister  
 Caroline Implement  
 Dale Jensen  
 Norbert H. Neumeyer (IMO)  
 James Patenaude

**District 27-C1**

Terry Bartelt  
 Dennis Blunk  
 Dick Buhalog  
 Matthew Domaszek  
 Mike Garvin  
 Joseph Giovanoni  
 Ron Gut  
 Robert J. Henning  
 Debra Knudsen  
 Larry Korpela  
 Timothy Lambert  
 Ray Lang  
 Ervin Mueller Jr.  
 Charles "Chuck" Piotrowski  
 Leah Reas  
 Lyle Roe  
 Jon Swanson  
 Duane Willfahrt

**District 27-C2**

David Johnson  
 Doug Kaltenbach  
 Karen Kocovsky  
 Marko Modic

Linda Morley

Michael Romportl

Mark Suckow

**District 27-D1**

Walt Althaus  
 Greg Heinen  
 Patricia Ann McNulty  
 Dan Roe  
 Roger Schneeberger  
 Richard Turner

**District 27-D2**

James "Jim" Friske  
 Karen Spreuer

**District 27-E1**

John Carlson  
 Chuck Daly  
 Mark Warren Fox  
 Bruce Frei  
 Faye Grimm  
 Marilyn Lemieux  
 Marcia Lyons  
 Dennis McQuillan  
 Doreen A. Mrotek  
 Dave Nelson  
 Gary C. Nelson  
 Dave Schilling  
 LaVerne Schreiner

**District 27-E2**

Larry Frye  
 Gene Hagen  
 Warren Kozitza  
 Rosemary Matzek  
 Jay Nesseth  
 Ed Nogosek  
 Alice Zillmer