Bugle

WINTER 2025



MEET 2025 LIMESTONE AWARD RECIPIENT

EDWARD STEPANCHUK

A PUBLICATION OF
The Honorable Order of Kentucky Colonels®

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The Honorable Order of Kentucky Colonels

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KyColonels.org

From the Commanding General

What a year it has been!

More than 700 Kentucky Colonels gathered recently for our annual Homecoming—a time of celebration, connection, and reflection. Together, we marked another year of incredible giving: $2.5 million awarded this year through the Good Works Program to charitable organizations across the Commonwealth. The weekend was filled with pride in what we've accomplished together and renewed commitment to the mission that unites us—being a force for good in the world.

Homecoming 2025 marked a historic occasion for the Honorable Order of Kentucky Colonels as a new tradition of excellence was inaugurated with the presentation of the first-ever Limestone Award. In this issue of *Bugle*, we celebrate Colonel Edward Stepanchuk, the first recipient of the Limestone Award.

As we close another successful year, we introduce you to Kentucky Colonels Travis Montgomery, Larry and Cheryl Nelson, Roger Wagner, Micah North, and General Kim Leanhart, whose work in business and community service reflects the values of leadership, compassion, and generosity.

We also spotlight two outstanding nonprofits: Community Ventures, empowering Kentuckians to achieve financial independence through entrepreneurship and homeownership, and the Hindman Settlement School, preserving Appalachian culture while improving literacy and fostering creativity for generations to come. Your generosity through the Good Works Program helps these organizations make a lasting difference.

This issue also features former Generals Brooks Bower and Bill Samuels Jr., who continue to embody the enduring leadership and Colonel spirit that inspire us all.

As the year draws to a close, we want to express our heartfelt gratitude. Your support, service, and generosity make everything we do possible. Because of you, children are educated, families are supported, communities are strengthened, and Kentucky continues to shine a little brighter.

Thank you for another remarkable year of compassion and commitment. May the coming year bring you peace, joy, and continued pride in what we accomplish together as Kentucky Colonels.

With gratitude and Colonel pride,

Gary W Boschert

Gary Boschert
Commanding General
HOKC



Colonels Homecoming 2025

November 13-15

Louisville, Kentucky

HOMECOMING 2025

For three days, over 700 Kentucky Colonels and guests, from 24 states, celebrated the impact HOKC has made through the Good Works Program. We enjoyed good conversation, good food, and bourbon, and even a couple of good bets prevailed in this three day celebration. If you missed it this year, make sure you join us in 2026!

Thursday Nov. 13th & Friday, Nov. 14th

Scheduled events included:

- Kentucky Colonels Meet and Greet
- Good Works Nonprofit Impact Tour
- Bats & Bourbon at the Louisville Slugger Museum & Factory
- Private Bourbon Tastings with Ian Sulkowski and General Fred Minnick
- Welcome Reception and Dinner/Dance













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Colonel Edward Stepanchuk

THE 2025 LIMESTONE AWARD RECIPIENT

Written by Colonel Leslie Watkins



Homecoming 2025 marked a historic occasion for the Honorable Order of Kentucky Colonels as a new tradition of excellence was inaugurated with the presentation of the first-ever Limestone Award.

The Limestone Award is a distinguished honor bestowed by the HOKC, celebrating exceptional generosity and commitment to community impact. It celebrates exceptional generosity and commitment to community impact. The award is named after Kentucky's iconic limestone, a symbol of strength, resilience, and historical significance. Just as limestone forms the bedrock of our heritage, this award recognizes a Colonel whose contributions have profoundly enriched the lives of others, creating a lasting foundation for positive change.

The Honorable Order expects that recipients of the Limestone Award will be pillars of their communities, demonstrating a dedication to community improvement, leadership, and philanthropy, all embodied by the first recipient, Colonel Edward Stepanchuk.

Colonel Stepanchuk's career of service encompasses 22 years in the military, where he stood on the front lines and retired as a Lieutenant Colonel in the United States Army. As a young officer, his intelligence and strategic thinking were key to major military operations like NIMROD DANCER and JUST CAUSE, which led to the overthrow of the Noriega Regime in Panama.

Later, the Army Chief of Staff tapped him to be a key figure in the development of tactical intelligence procedures that saved countless lives in future combat operations. Following the tragedy of 9/11, he was thrust into the heart of the national





security response as the Chief of Afghan Analysis, providing critical daily briefings to the Pentagon, the Secretary of Defense, and other senior officers. His work saved many lives in several key operations.

> "Lieutenant Colonel Stepanchuk is a leader by example. He works with ease with all ranks and knows how to build a winning team. He cares."
>
> **— Colonel Bud Henry**
> *Former Brigade Commander*

His exceptional service earned him the Legion of Merit, recognizing exceptionally meritorious conduct, and the prestigious Knowlton Award, acknowledging significant contributions to Army Military Intelligence.

But the true measure of his character is not just what he accomplished in his military career, but what he built when he came home to Mount Sterling, Kentucky. For the last 17 years, Colonel Stepanchuk has dedicated himself entirely to his community, especially to the lives of young people.

As the Senior Army Instructor for Junior ROTC, he does not simply teach leadership—he fundamentally improved leadership opportunities for students across Kentucky by getting Junior ROTC recognized as a valid career path in the Kentucky Education System.

He is, above all else, a mentor to youth. As Head Varsity Track Coach, Stepanchuk pushes students to the height of their potential. He is a trainer of bodies, but more importantly, a developer of championship character. His compassion reached beyond the curriculum when he found housing for students who became homeless and worked behind the scenes to secure college scholarships. And, in one of the most heartwarming gestures, he became a "father for a night" for a young Homecoming Queen, walking her across the football field.

Colonel Stepanchuk is a pillar of strength and resilience, and a humble man who walks with his cadets on the annual 13-mile Bataan Memorial Death March, leading by example despite his own disabilities, proving that perseverance can achieve any goal. He has been recognized with the Military Outstanding Volunteer Service Medal and is a recipient of the Daniel Carter Beard Masonic Scouter Award.



For his military service, for his compassionate mentorship to youth, and for his unwavering dedication to his community, we were honored to present the inaugural Limestone Award to Colonel Ed Stepanchuk.

HINDMAN Settlement School

Honoring Tradition, Building the Future



Written by Colonel Josh Mullins
Senior Director, Operations
Hindman Settlement School

Since 1902, Hindman Settlement School has stood as a cornerstone of education, culture, and community in the heart of Eastern Kentucky. Founded by visionary educators Katherine Pettit and May Stone, Hindman was the first rural settlement school in the United States.

> From the very beginning, our mission has been to provide education, preserve Appalachian culture, and create opportunities that uplift the people of our region.

Over the course of more than a century, Hindman has adapted to meet the ever-changing needs of Eastern Kentucky families, always guided by the values of resilience, service, and community.

Today, Hindman Settlement School remains committed to those original ideals while expanding programs that respond to current challenges. Our work centers on three major areas: dyslexia intervention, community agriculture and foodways, and the preservation and sharing of Appalachian arts and culture. Each of these initiatives not only enriches individual lives but also strengthens the fabric of our rural communities.

We are deeply grateful to the Honorable Order of Kentucky Colonels and its Good Works Program, whose generosity has made it possible for us to expand our reach and impact in powerful ways. The support of the Colonels has allowed us to build new resources, respond to crises, and provide educational opportunities that are transforming lives in the mountains.

One of the most visible examples of this support is the Kentucky Colonels Cannery, a facility established at Hindman through the generosity of the Colonels. More than just a space, the Cannery has become a living classroom for food preservation and community resilience. Here, children and adults learn the time-honored skills of canning, freezing, and processing food, which are practices that have sustained Appalachian families for generations. The Cannery also serves as the home of our annual Larder & Lore event, which brings people together to celebrate Appalachian foodways, traditions, and stories, showcasing how this investment continues to enrich and connect our community.



For students, the Cannery offers hands-on education in food science, agriculture, and healthy living. For adults, it serves as a resource to preserve harvests and reduce food insecurity. And, for our broader community, the Cannery has become a gathering place that connects people through shared traditions of food and fellowship. This investment by the Kentucky Colonels ensures that knowledge of food preservation will continue to be passed down, equipping families with skills that are both practical and culturally meaningful.

The devastating floods of July 2022 left a lasting mark on Knott County and the surrounding region. Homes, schools, and community institutions were swept away, and Hindman Settlement School itself sustained significant damage. In the wake of this tragedy, the Kentucky Colonels once again stood by our side. Through a flood recovery grant, the Colonels provided essential resources that helped us clean, repair, and restore spaces so we could continue serving our community without interruption.

The Colonels' timely assistance made it possible for us to resume critical programming more quickly and to offer comfort and stability to families who turned to us in a time of loss.

Another area where the Colonels' generosity has made a life-changing difference is our dyslexia intervention program. For decades, Hindman Settlement School has been a leader in addressing the needs of students with dyslexia, a learning difference that affects one in five children. Through specialized, evidence-based instruction, our reading labs provide struggling readers with the tools and confidence they need to succeed in school and beyond.

With funding from the Kentucky Colonels, we were able to purchase iPads for use in these reading labs. Technology has become an invaluable complement to our teaching methods, enabling students to engage with interactive literacy tools, track their progress, and access resources that extend learning beyond the classroom. For many of these children, the gift of reading is truly life-changing, opening doors to academic success, self-confidence, and a brighter future.

Education at Hindman often begins in the classroom but extends far beyond its walls. Thanks to support from the Colonels, we have been able to install indoor hydroponic systems that allow students to learn about agriculture, science, and sustainability in a hands-on way.





These systems provide opportunities for students to grow and study fresh produce, connecting lessons in biology, nutrition, and environmental stewardship. For many children, especially those from families facing food insecurity, the experience of watching plants grow and harvesting food they nurtured themselves is both educational and empowering. This investment fosters curiosity, self-reliance, and a deeper connection to the land and resources that sustain us.

Every project supported by the Kentucky Colonels contributes to our mission of creating opportunities for people in Eastern Kentucky. Whether it is preserving Appalachian food traditions, helping children learn to read, responding to natural disasters, or introducing new methods of growing food, each effort strengthens our community for generations to come.

At Hindman Settlement School, we often reflect on the vision of our founders, who believed that education and cultural pride were the keys to progress in the mountains. Thanks to the continued partnership of the Kentucky Colonels, we can carry that vision forward, adapting it to meet the challenges of today while remaining rooted in the traditions that make our region unique.



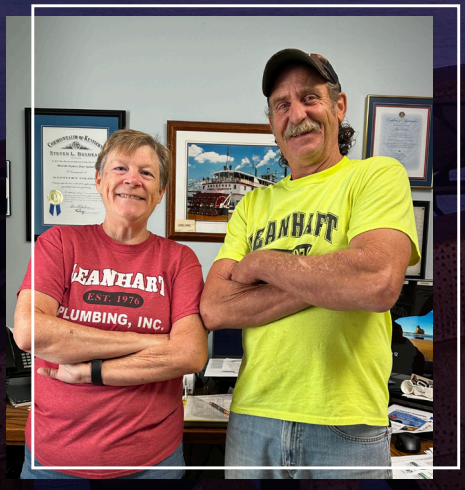
Colonels in Commerce

Written by
Colonel Leslie Watkins





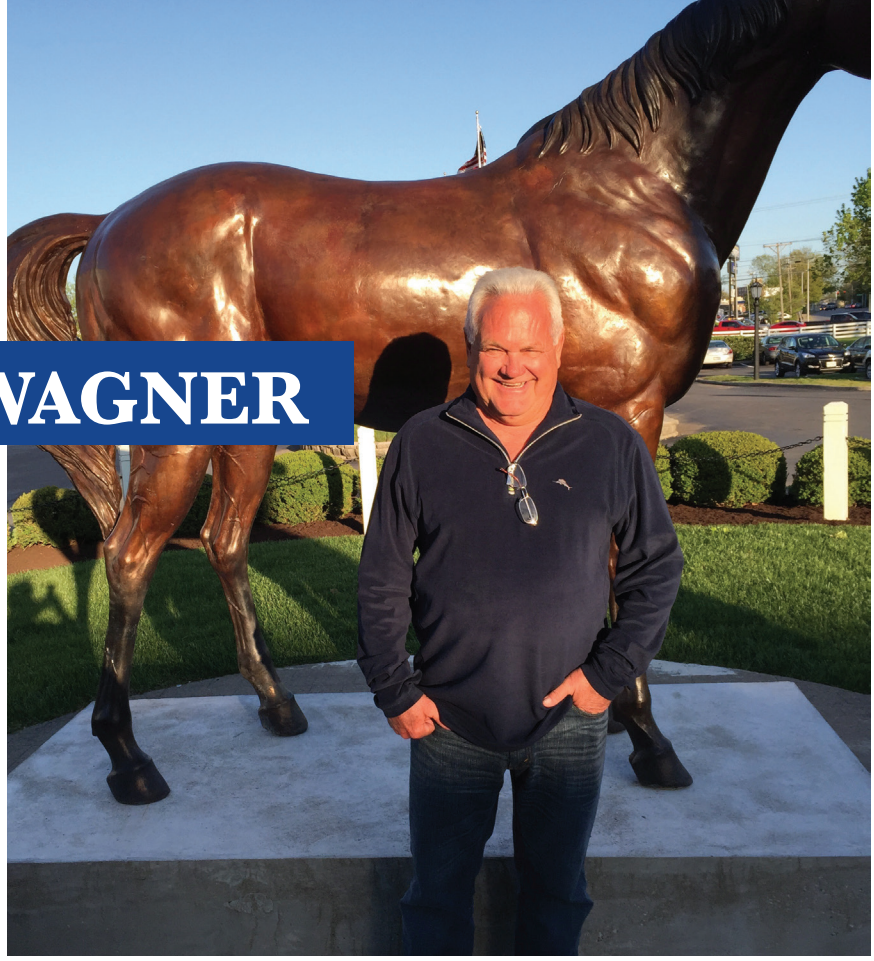






Colonels in Commerce

ROGER P .WAGNER



Back in 1966, a front desk clerk job at the Dunes Hotel in Las Vegas, Nevada, was the beginning of Kentucky Colonel Roger Wagner's career in the hospitality industry. Born in Billings, Montana, Wagner moved to Boulder City, Nevada, with his family, where they grew up enjoying activities such as tent camping, fishing, and water skiing. Wagner was awarded the Eagle Scout rank in 1962.

He attended the University of Nevada, Las Vegas, on a four-year track scholarship (lettering each year) and earned a bachelor's degree in hotel administration in the first graduating class of the UNLV Hotel College in 1969.

Upon graduation from college, Wagner was hired in his first management position at the Sands Hotel, back in the days of the Rat Pack era, eventually serving as General Manager of several casino hotels and in senior corporate operating roles, during his 45 years in the hospitality industry. Over the years, he managed casinos in numerous locations throughout the country for employers that included MGM, Del Webb Corporation, Resorts International, and Donald Trump. Wagner retired in 2010 but continued to serve on the board of Directors of Eldorado Gaming Corporation until 2020.

The highlight of his career was serving as president and chief operating officer of Jack Binion's Horseshoe Gaming Holding Enterprises, LLC, from 1998 to 2004, where he was responsible for identifying, evaluating, and executing all aspects of casino gaming operations. At that time, the Horseshoe company was the world's largest privately held gaming company. In 2004, the Horseshoe corporation was sold to Harrah's Entertainment, and Wagner took that opportunity to become the founding partner at House Advantage, LLC, a gaming consulting group.

In November of 2011, Wagner wrote *No Work and All Play: Audacious Chronicles of a Casino Boss*, a book describing a lifetime in such a career.

Wagner was introduced to the Honorable Order of Kentucky Colonels almost 40 years ago. In 1986, a "high roller" customer in Atlantic City told Wagner that the Honorable Order of Kentucky Colonels was his favorite organization and subsequently nominated Wagner to become a Kentucky Colonel–and made his first year's contribution. Wagner has been involved in community affairs for his entire career. He was a past chairman of United Way of Atlantic County, New Jersey, and served on several charitable boards of directors. He is presently serving as a board member of Goodwill Industries of Southern Nevada.

Wagner has contributed to the Honorable Order annually since he was commissioned in 1986.

> "The Kentucky Colonels' track record sold me from that point on. Once I saw the good that comes from the many efforts of this organization, I knew I had to continue making an annual commitment for life."

Colonels in Commerce

MICAH NORTH



Kentucky Colonel Micah North is the president and chief executive officer of Resonant Sciences, a rapidly growing defense and aerospace research and development firm headquartered in Beavercreek, Ohio.

A native of Chattanooga, Tennessee, North earned a bachelor's degree in chemistry from the Virginia Military Institute and a Ph.D. in physical chemistry from Florida State University and planned to teach chemistry at the college level. A job offer from the Signature Management group at Lockheed Martin's Skunk Works division changed those plans, beginning a new career path for North in aerospace and defense, contributing to advanced technologies for both operational and developmental platforms.

He later joined Northrop Grumman Aerospace Systems, where he led the Hot Trailing Edge Integrated Product Team, managing a multidisciplinary engineering group developing next-generation stealth and radar systems on platforms such as the B-2 Bomber. North then moved to ATK Military Systems (now part of Northrop Grumman), where he led the Manufacturing, Materials, and Processes group. He later established and directed the Technology Development business unit, overseeing successful efforts to secure, execute, and transition advanced technologies from concept to deployment.

This deep technical background laid the foundation for his next move, founding Resonant Sciences in January 2015 with a group of colleagues who shared his vision for innovative solutions to do things differently in the defense sector, pushing the technology in ways others in the field did not think were possible.

Resonant Sciences has one main goal: to support the U.S. military and its partners in staying prepared for a wide range of scenarios, but North said Resonant Sciences strives to be more than a "traditional" defense contractor and emphasizes speed, innovation, and a willingness to tackle "hard problems" end-to-end —from concept through production and fielding.

Commissioned in 2014, North resides in Bellbrook, Ohio, with his wife and their two children. Colonel North is actively involved in his local church and supports several charitable organizations, including the Dayton Victory Project, a privately funded 501(c)3 after-school program mentoring disengaged young men, grades 8-12 in Dayton, Ohio. The Victory Project provides meals, tutoring, and microenterprise opportunities, where young men who do the right things during the week earn the privilege of working on the weekend.

Colonels in Commerce

KIM LEANHART



General Kim Leanhart grew up in Louisville, where she attended Doss High School. She was part of a blended family of seven children. From a young age, Leanhart showed a creative flair; she was a talented artist who won a statewide art competition and even placed third at the national level.

Her parents worked for a friend's plumbing contracting business and, eventually, started their own business. Leanhart remembers, as a child, using flash cards to help her father study for his Master Plumber's license. That early exposure gave Leanhart an understanding of the business from the ground up and instilled a sense of ownership and duty.

Initially, Leanhart planned to pursue a career in nursing and graduated from the Licensed Practical Nurse (LPN) program at Watterson College. However, circumstances intervened; an illness and two small children meant that she had to forgo the nursing path. At the same time, her parents needed help in the plumbing business, so she began working in the office. Over time, she took on responsibilities such as bidding jobs, delivering materials to jobsites, and even driving the forklift.

When her parents retired, Leanhart and her brother took over the business, which at the time provided both plumbing service and new construction work. The timing was challenging; during the 2008 financial crisis, many construction-focused businesses struggled. Leanhart and her brother made strategic decisions to restructure the company, shift away from new construction work, and focus instead on commercial and residential plumbing service work (including remodeling). The business, Leanhart Plumbing, is proud to be a locally owned, family-run, women-led business serving the Louisville metro area.

Leanhart's spouse, Sheila (also a Kentucky Colonel), also works in the business. Sheila brings a background in medical billing and electronics, and together the couple contributes their complementary skill sets to the plumbing enterprise.

Leanhart says she met frequent challenges in a male-dominated business when customers questioned if she knew about plumbing. She said she realized she knew what she was doing and did not have to prove herself.

Under Leanhart's leadership, Leanhart Plumbing offers services including plumbing installations and maintenance, drain and sewer repair, backflow preventer services, water and drain line work, faucets and fixtures, garbage disposals, sinks and toilets, and water heater services.

Leanhart has applied the same energy she uses in business into community service and philanthropic endeavors. In 2007, she served as president of the Pleasure Ridge Park Business Association and as chair of the Dixie Area Business Association. In that same year, she was commissioned as a Kentucky Colonel. Leanhart said, "I was honored, but I did not really know what it was. When I found out, I was so honored that I said, 'I'm going to be a great Colonel.' Leanhart began to donate annually and volunteer for the Day of Service. She also started and is president of the Derby City Kentucky Colonels chapter. Leanhart appreciates that the Honorable Order vets nonprofits before awarding grants and said, "I feel my donations go to better places because the HOKC knows where to send them."

Beyond serving as a trustee for the Honorable Order of Kentucky Colonels, Leanhart is active with Southwest Community Ministries, a nonprofit supporting individuals in need in Jefferson County. Through this role, she works with their food pantry and Meals on Wheels program, and helps provide personal hygiene items, diapers, toilet paper, and dish soap—items not covered by food stamps. In certain ZIP codes in Jefferson County, the ministry also offers utility and occasionally rent assistance.

Colonels in Commerce

LARRY & CHERYL NELSON



In the heart of Kentucky's Bluegrass region, Colonels Larry and Cheryl Feddern Nelson have quietly revolutionized cattle breeding, strengthened agricultural communities across the country, and embodied the Kentucky Colonels' spirit of philanthropy.

Larry Nelson grew up in Alliance, Nebraska—known as the cattle capital of the state—where his early experiences with livestock shaped his future. He attended the University of Nebraska at Lincoln, where he was active on the rodeo and livestock judging teams. After graduation, Larry spent a year working on a ranch in the Colorado mountains before a friend convinced him to return to school. He enrolled in the prestigious animal reproduction program at Colorado State University, which was then recognized as the top program in the nation.

Meanwhile, Cheryl Feddern grew up in Limon, Colorado, where she showed horses and excelled in speed events. But her career path was truly set when a veterinarian saved her horse after a rattlesnake bite. Inspired, she pursued an Animal Science degree at CSU, where fate—and a surgical scrub sink—intervened.

One day, while washing up in the lab, Larry asked Cheryl to dinner. The partnership they formed there has lasted a lifetime. They married in January 1979, and, while Cheryl continued her veterinary studies, Larry worked on the staff of the university's animal hospital.

After graduation, their professional paths led west to Arizona, where Larry specialized in embryo transfer, and Cheryl became a resident veterinarian responsible for the care of 1.5 million cattle. Not long after, an opportunity arose with a CSU colleague starting a genetic engineering company in Denver. The Nelsons joined the venture, pioneering groundbreaking work in artificial insemination—collecting and freezing semen from bull studs and implanting embryos into cows, laying foundations for many modern reproductive techniques.

In 1982, Kentucky cattle farmer and former Commanding General of HOKC, Mike Molloy of Achilles Cattle Company recruited the couple to bring their expertise east. A year later, in 1983, they founded Nelson Reproductive Services in Versailles. Starting modestly, they mailed 2,000 letters to potential clients; the first response came from a farm in New Jersey. Together, the Nelsons provide on-farm reproductive management, embryo transfer, and consulting that help producers upgrade herd genetics and reproductive efficiency. Today, their impact spans 44 states, with embryos shipped to 17 foreign countries.

Outside their business, Cheryl has extended her veterinary expertise into public service, serving on Louisville's hazardous incident response team and teaching canine tactical emergency critical care.

Both Larry and Cheryl were commissioned as Kentucky Colonels in the early 1980s and take pride in being part of the Honorable Order of Kentucky Colonels. "We appreciate how much the organization gives to nonprofits through the Good Works Program," they note, "and the types of organizations that benefit."

Colonels in Commerce

TRAVIS MONTGOMERY



At 84 years old, Kentucky Colonel Travis Montgomery has lived a life marked by service, leadership, and an entrepreneurial spirit. Born and raised in Long Beach, California, where he lived for 63 years, he retired 21 years ago and remains active in philanthropy and community service.

As a young person, Montgomery participated in both basketball and baseball, and he played trombone in the orchestra and was a member of the junior high all-city orchestra in Long Beach. He also joined the Boy Scouts of America as a Cub Scout, eventually attaining the rank of Eagle Scout and later earning the Silver Beaver award in recognition of distinguished service. In high school, he was a member of the Kiwanis-sponsored Key Club and served as the District Governor of Key Club for the California/Nevada/Hawaii District, which had 78 individual Clubs and over 2,000 members.

In college, he attended what is now California State University, Long Beach (formerly Long Beach State College), where he earned a degree in Public Administration. During his college years, Montgomery worked at a men's clothing store in a shopping center. That early retail experience laid a foundation for his next role: upon graduation, he took a position in property management for the shopping center, eventually rising to the role of Vice President of the property. This period sharpened his skills in leasing, tenant relations, facility oversight, and commercial real estate fundamentals. He also became involved in politics and served as chairman of the Committee to Re-elect Richard Nixon for Long Beach and the surrounding cities.

In 1979, Montgomery transitioned to the Port of Long Beach authority, serving as Director of Government Affairs and Worldwide Marketing until 1982. At that time, the Port of Long Beach was the largest in the United States (in competition with Los Angeles). He traveled globally, visiting the Port's seven international offices, worked in Washington D.C. on maritime legislation and port-authority policy, and managed relationships with shipping lines leasing terminals. On one notable occasion, he helped coordinate arrangements for President Ronald Reagan to sign maritime legislation at Long Beach.

After thirteen years at the Port Authority, Montgomery accepted an invitation from his former boss to move into the private/tourist-attraction sector: he became Vice President and Chief of Staff of the Queen Mary (the ship permanently moored in Long Beach), which operated as a hotel, museum, restaurant, and tourist attraction. Responsible for day-to-day operations, including seven restaurants, historical tours, and a 365-room hotel, Montgomery managed a unique enterprise blending heritage tourism, hospitality, and real estate. During his tenure, he escorted British Prime Minister Margaret Thatcher during her visit to the Queen Mary, spending twenty minutes with her in a limousine as her escort to the hotel.

Montgomery is a longtime volunteer for the American Cancer Society of Long Beach, serving many years as the volunteer auctioneer at an annual fundraising dinner; over time, his efforts helped the event grow until the final dinner he chaired raised $500,000 in one night—at that time the largest single one-day fundraising event for the American Cancer Society in the United States. That is where he met his wife, Valerie, the director of fundraising for the American Cancer Society, to whom he has been married for 49 years. His work with the American Cancer Society earned him his Kentucky Colonel commission. He also served as president of the Long Beach Area Council of the Boy Scouts of America, chairman of the board of trustees of St. Mary Medical Center, and vice-chairman of the Long Beach Area Chamber of Commerce and played a foundational role in the Arthritis National Research Foundation.

Montgomery and his wife purchased a new home in Jacksonville, Florida, and will become "southerners" in December.

Colonels Homecoming 2025

November Louisville, Kentucky

Continued from page 3

Saturday, Nov. 15th

Scheduled events included:

- Colonels' Day at the Races

















CHARITABLE GIVING & THE NEW TAX LAW

Jonathan Raymon, of Baird Trust, provides an overview of the new tax law.

For Colonels, giving back is in our blood and means supporting causes and having a positive impact around the Commonwealth. Giving in a tax-efficient manner allows your gifts to be even more effective.

The One Big Beautiful Bill Act (OBBBA) became law on July 4, 2025. Though not solely focused on charitable giving, the bill contains several relevant provisions. Generally, these changes encourage the vast majority of taxpayers to opt for the standard deduction rather than itemized deductions. The higher deduction provides opportunity for savvy donors to be more efficient in their giving.

Effective this year, the bill increased the standard deduction for single taxpayers to $15,750 and for married couples filing jointly to $31,500. This provision continues the trend of significantly higher amounts that began with the 2017 Tax Cuts and Jobs Act–which nearly doubled the standard deduction. A higher standard deduction means many taxpayers do not receive any tax benefit from charitable giving–in fact, around 91% use the standard deduction instead of itemizing individual deductions.

Beginning in 2026, a popular Covid-era tax break is coming back, allowing a limited additional charitable deduction to taxpayers who take the standard deduction. The provision states that the first $1,000 an individual taxpayer gives to charity may be stacked above the standard deduction. For married couples who file jointly, each spouse can obtain this extra benefit.

To get more tax savings from charitable giving, taxpayers may "bunch" their gifts in select years when the deduction is most advantageous. Bunching involves giving multiple years' worth of donations in a single year to reach above the standard deduction threshold. For example, if you typically donate $17,500 a year to your favorite charity, you could instead bunch your annual giving and donate $35,000 in one year. This would allow you to itemize and enjoy an additional $3,500 deduction above your standard deduction. The next year, you could take a break from giving and simply claim the standard deduction. Over a multi-year period, the amount donated is the same–but the timing allows additional deductibility. Larger donations in select years can be even more beneficial when using appreciated assets and timing them in years that you will receive the largest tax break.

Other opportunities like Qualified Charitable Distributions (QCDs) and gifts of appreciated assets remain unchanged but are worth reiterating. QCDs are now indexed for inflation, meaning that individuals who are 70 ½ or older by December 31st can give up to $108,000 from their IRA and avoid recognition of that income. Gifts of appreciated assets can be used in conjunction with the bunching strategy described to avoid recognition of capital gains.

This is not an extensive list of all opportunities available–just some of the more common. Each Colonel has unique circumstances, and we encourage you to work with your own financial advisors regarding your philanthropic giving.





COMMUNITY VENTURES

Written by Shon Wylie
Contributing Writer, Community Ventures

Over four decades ago, Community Ventures set out to help Kentuckians build a better future. The mission we established in 1982 remains the same today: to help break the chains of generational poverty while working to revitalize communities integral to our state's rich and complex heritage.

From that point on, we have cultivated home and small business ownership, ever mindful that the scope of our services should grow alongside the needs of the people we serve. Today, our work stretches statewide, across rural towns and urban neighborhoods.

We don't just work in communities—we work with them. Our belief is simple: when given the tools and support needed to build a better life, people will transform not just their own lives and futures, but those of generations to come.

Whether we are supporting first-time homebuyers or budding entrepreneurs, our focus is on building strong communities where people don't just live, they thrive.

Because communities are not 'one-size-fits-all,' neither are our solutions for housing, small business development, and community revitalization. Working hand-in-hand with entire communities, we tailor our efforts to their unique visions of success.

We provide coaching and resources to those dreaming of homeownership and help budding entrepreneurs to develop sound, sustainable businesses. We breathe new life into historic properties, reimagining them as anchors of culture and commerce that, once revived, become a source of community pride. And, now, we are working to establish a model for affordable, sustainable, quickly constructed housing to help Kentuckians recover more quickly from weather-related devastation.

Pioneering projects like the transformation of the former Millersburg Military Institute in Millersburg and the revamping of iconic Jay's Cafeteria in West Louisville blend economic development with creative placemaking. Now known respectively as Mustard Seed Hill and Chef Space, these projects would not have been possible without the support of organizations like the Kentucky Colonels. That is what makes your support so incredibly impactful.

> *"Thanks to the generosity of the Kentucky Colonels, we have been able to deepen our work at both Mustard Seed Hill in Bourbon County and Chef Space in West Louisville. Your grants are both appreciated and transformative!"*

In Millersburg, Mustard Seed Hill stands as a stunning example of how history and progress can coexist. Once an abandoned and crumbling elementary school building, it is now a beautifully restored community hub, the centerpiece of which is Christmas at Mustard Seed Hill. This seasonal festival dazzles visitors with amazing lights, artisan shopping, and all the sights, sounds, and tastes of the holidays.

The remainder of the year, the historic campus shines as a magical setting for weddings and events—the perfect



engine to get the town's economy rolling again. Since opening in 2018, it has drawn tens of thousands of visitors to Millersburg.

Kentucky Colonels' support has enhanced the visitor experience at Mustard Seed Hill, making the campus more welcoming and accessible for all. Your funding has both outfitted a commercial kitchen space and provided comfortable furniture for an outdoor tent area open throughout the holiday season. The tent is free for all visitors and has become a central gathering place where people relax and converse.

"On behalf of everyone at Mustard Seed Hill and the entire Millersburg community, we are profoundly grateful to the Kentucky Colonels for your generous Good Works Grant," said Victoria Benson, President of Mustard Seed Hill. "Thank you for helping us create a magical, meaningful place that the people of Millersburg can be proud to call their own."

In Kentucky's largest city, Chef Space is an anchor point for the revitalization of historic West Louisville, creating a recipe for upward economic mobility through small business ownership. This state-of-the-art kitchen incubator provides licensed commercial kitchen space, business coaching, and resources for local and regional food entrepreneurs, many of whom have struggled to access the help and funding they need to succeed.



> Since opening in 2015, Chef Space has helped over 200 businesses start or expand

There are 32 businesses currently utilizing the kitchen. Each year, we dish out 600 hours of technical assistance, while our Entrée-preneurship classes educate some 50 participants a year.

Colonel funding has allowed us to maintain and improve this critical space—ensuring it is fully equipped and accessible to those building their dreams from scratch. "Thanks to the Kentucky Colonels, we're able to support entrepreneurs who may not otherwise have had access to the resources and infrastructure they need," noted Tom Murro, President of Chef Space. "These grants help us nurture talent and contribute to the continued revitalization of West Louisville."

The effects of your generosity ripple out like rings from pebbles dropped in a pond. They can be seen and heard at every wedding or event at Mustard Seed Hill and tasted in every edible delight imagined and crafted at Chef Space.

These ripples are tangible: Local jobs created, tourism dollars flowing again, and pride of place returning to a forgotten corner of Bourbon County and a disinvested Louisville neighborhood. What is happening in West Louisville and Millersburg may look different on the surface, but underneath, both are rooted in our core belief—given the knowledge, tools, and resources they need, communities and their people will prosper. These are communities truly transformed—and the Colonels are part of it.

We are deeply honored to be among the organizations you have chosen to support through the Good Works Program. Your belief in the power of local impact pours fuel on our fire.



FORMER GENERAL

GENERAL BROOKS BOWER



As a kid growing up in the San Francisco Bay area, General Brooks Bower did not expect to spend a significant portion of his life in Kentucky, but, in 1978, he moved to Louisville to start up a new plant for the family business, Papercone Corporation, the largest privately held specialty envelope manufacturer in the U.S., for which he is now chairman and chief executive officer.

Working for his father on Saturdays and in the summers during his youth, Bower began to learn the printing business and even ran his own printing press from the basement of their home. He graduated in 1974 with a degree in printing from Rochester Institute of Technology (RIT) in Rochester, New York. During his college years and upon graduation, he worked at the Boise Cascade Envelope Division in Rochester before returning to San Francisco to work at Papercone, which made paper collars that went over soft drink bottles and then evolved into the specialty envelope business.

Commissioned by Governor Julian Carroll in 1979, Bower joined the HOKC Board of Trustees in 2014. General Bower's business background was helpful during his board tenure, and he was actively involved in the search for a new headquarters building. Especially meaningful to him, like other Generals, was the opportunity to vet grant applications, and he specifically remembers an organization that helped older Kentuckians asking for equipment for a beauty salon and organizations that helped inner-city kids. General Bower said, "I appreciate knowing that the donations are going to good use."

Bower's philanthropy focuses on organizations with which he is active such as the Salvation Army and the Walden School, on whose boards he now serves as board member emeritus, as well as the March of Dimes and the Kentucky Derby Museum. A member of the board of trustees at RIT, Bower chaired the largest fundraising effort in the university's history and was named the RIT Outstanding Alumnus in 2017.

Bower and his wife, Marilyn, have two children and six grandchildren. They were recently honored by the Louisville Historical League for creating a museum in their Soldier's Retreat home, showcasing its 200-year-old history and paying tribute to Revolutionary War Colonel Richard Clough Anderson, the owner of the original home at the site. Bower also has ten antique presses at his Louisville estate and, he said, enjoys tinkering with them when he has time.

General Bower remains involved with HOKC.

"Serving on the HOKC board made me a better person."

Features

Written by
Colonel Leslie Watkins

GENERAL BILL SAMUELS, JR.



Born on National Bourbon Day, General Bill Samuels, Jr. grew up steeped in bourbon culture and family enterprise. He took the reins of Maker's Mark in the 1970s and guided the brand's growth for decades, transforming a regional favorite into an internationally recognized premium bourbon.

Samuels grew up on Distiller's Row in Bardstown, Kentucky, as the son of Maker's Mark Founder William Samuels, Sr., and godson of bourbon legend Jim Beam. He spent a summer driving Colonel Harland Sanders around Kentucky as he was launching his now-famous chicken business.

Attending college at Case Western Reserve University and the University of California, Berkeley, Samuels chose a career in engineering, studying rocket science and solid propellants, and eventually worked on the design of the Gemini and Polaris missiles.

He also attended and graduated from Vanderbilt University Law School and worked as an intern at the White House before joining his father in the family business.

When Samuels joined the family business, his father decided to continue to focus on the bourbon and financial aspects of the company, and Samuels would focus on what his father called the "outside" work. Samuels tricked his father into an interview with a *Wall Street Journal* reporter, the beginning of the unique public relations work for which Maker's Mark is known. Samuels assumed leadership of Maker's Mark in the mid-1970s. He is proudest of maintaining the quality bourbon his father insisted on and the creation of the Maker's Mark Ambassador program, a way to build camaraderie among brand fans.

Samuels served as a General on the HOKC board from 1997 until 2017 and was awarded the Legion of Merit award, a distinction that recognizes his exemplary service to the organization. He has chaired the board of more than 25 different nonprofit organizations over the course of his career.

He was named the Kentucky Entrepreneur of the Year on three occasions and was named Louisville's 2004 Citizen of the Year. He received the 2011 Ernst & Young Lifetime Achievement Entrepreneur award, and was inducted into the Kentucky Business Hall of Fame in 2006.

Samuels was part of the inaugural class of the Kentucky Bourbon Hall of Fame in 2001.







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…from Ashland to Paducah, 4 million Kentuckians benefit from the Honorable Order of Kentucky Colonels' Good Works Program. Children, veterans, people with disabilities, the hungry, and the homeless all find help through the services of 333 nonprofits receiving grants from us this year.

A commission as a Kentucky Colonel is the highest civilian honor a Kentucky governor can bestow., and many Colonels consider annual or monthly contributions to the Honorable Order to be a continuation of the altruistic activity that earned them that commission.

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