



500 West Jefferson St., Suite 1600
 Louisville, KY 40202
 (502) 584 - 1101

301 East Main St., Suite 1100
 Lexington, KY 40507
 (859) 253 - 1100

http://www.mspotter.com
 e-mail: info@mspotter.com

PRSR STD
 U.S. Postage
 PAID
 United Mail

MOORE NEWS

The Lexington office of Moore Stephens Potter has moved its location.

The new address is as follows:

Moore Stephens Potter LLP
301 East Main St., Suite 1100
Lexington, KY 40507

The phone number and fax number have remained the same. They are:

Phone (859) 253-1100
Fax (859) 253-1384
www.mspotter.com

Inside This Issue:

A Simple Name Change
 pg. 1

Why Donor Management?
 pg. 2

**Client Spotlight -
 The Blue Grass Trust for
 Historic Preservation**
 pg. 3

THE TAX EXEMPT NEWS



Winter 2003

*We're still the
 same firm,
 with the
 same ownership,
 but with the
 ability to
 call on 13,000
 professionals
 in over
 84 countries
 worldwide.*

A new name, a new look - Potter & Company, LLP is now **MOORE STEPHENS POTTER, LLP**

Companies today, aided by technology and innovations that make borders obsolete, routinely do business throughout the country -- and around the world. Advisors and accountants need to be where their clients are, whether that's across the street or across the nation. With more than 85 years of experience providing business advisory and accounting services, Potter & Company, LLP, has met the challenge posed by such rapid change. Our affiliation with the global network of Moore Stephens International, Ltd., as an independently owned firm, ensures that we can offer the breadth of services to meet the needs of all of our clients, large and small.

Today's business climate is competitive. More than ever, we see companies diversifying into new industries. Through Moore Stephens, our clients have access to a global knowledge base, providing cutting-edge professional advice. We minimize client fees by accessing specialized consultants on an as-needed basis.

This is smart business.

And this is why we have changed our name to Moore Stephens Potter, LLP. *We're still the same firm, with the same ownership,* but now we have the ability to call on 13,000 professionals in over 84 countries worldwide. We offer clients the resources of an international accounting and consulting firm with the personalized service and care they expect from a local firm.

We are dedicated to our clients and, with the help of this resource-rich network, are determined to continue providing service beyond their expectations.

a simple name change, a world of opportunity

Moore Stephens Potter, LLP
 Locally owned, globally connected

Why Donor Management Software?

Let's begin with a definition of "donor management software"...

Donor management software (also called "fundraising software" or "development software") helps you keep track of your donors and prospective donors and all the information associated with them, including contribution data. It helps you manage your donors by dealing with routine correspondence chores, and helps you manage your fundraising activities with a variety of invaluable reports covering your operational and financial requirements.

Developing relationships with your donors is central to all fundraising efforts. Regular contacts that convey the importance of your mission through stories that touch your donor's hearts or incite their passion keep the donations coming in. It takes a human to truly connect with another, but good software simplifies the mechanics of the process so that you can focus on what you do best.

In addition to the important relationship value, Non-Profits must consider important issues on the financial side; capturing, accounting for and reporting contributions and pledges, real or in-kind. For Non-Profits who want to be in compliance with GAAP, you must comply with FAS 116 and FAS 117. Good donor management helps with these tasks.

Picking the right software is critical to meeting both objectives. And there are options without breaking the budget!

Most organizations find that using a donor management program increases donations and reduces costs, while reducing stress and frustration. Here's how:

- **Organized data maintenance:** All donor information (name, address, phone, etc) and giving history, plus notes about a person is in one place, which is easily accessed. In addition, you keep track of which mailings the donor has received, what events she attended, why he gives to your organization, and lots more. Pretty much any data you can think of gathering, you can and should keep in this program.
- **Increase your level of fundraising** with less time and aggravation: Whether it's simply automating the printing of thank you letters, tracking the effectiveness of different variations of a mailing, or implementing a new membership program, donor management software will make it possible.
- **Increase your productivity:** Reports that track each fundraising activity (appeals letter, newsletter, event, etc) and show you just what works and what doesn't will impress your Board of Directors, and give you the information you need to make improvements. Tracking volunteer efforts, Board member visits to major donors, printing lists of donors and phone numbers for a phonathon . . . the ways a donor management program can help are limited only by your imagination!

There are many other items to consider in the search and review process. The **Strategic Technology Group** of Moore Stephens Potter can help you with this process. **STG** can also help you select, implement, and train your staff to maximize your development program and solidify your donor relationships while maintaining compliance.

For more information, contact:

Joseph C. Johnson
Moore Stephens Potter, LLP
Strategic Technology Group
859-253-1100 ext 210
jjohnson@mspotter.com

See what is new besides our name change !

Training
<http://www.mspotter.com/training.html>

Options
<http://www.mspotter.com/acc.html>

CLIENT SPOTLIGHT



The Blue Grass Trust for Historic Preservation

The Blue Grass Trust is a non-profit advocate for historic preservation that strives to protect, revitalize, and promote the special historic places in our community to enhance the quality of life for future generations. The Trust's properties are guided by three tenets of the Trust Mission: Education, Service and Advocacy.

Since its inception in 1955, the Blue Grass Trust for Historic Preservation has sought to preserve and protect the rich and varied heritage of the Blue Grass Region. In the spring of 1955, concerned citizens banded together to save the historic Hunt-Morgan House from demolition. An on-going education and advocacy movement within the community, highlighting the important legacy of historic sites, buildings, monuments and rural landscapes in the Bluegrass, had begun.

The results of this community effort have, over the years, helped save several notable Kentucky landmarks, including the Dudley House, Shaker-town at Pleasant Hill, the Mary Todd Lincoln House and many others.

After the Hunt-Morgan House was secure from destruction, members of the Blue Grass Trust began to raise money to restore the house and gardens. Built for John Wesley Hunt and his wife Catherine in 1814, the house was originally dubbed "Hopemont." The house now offers visitors a glimpse into the early 19th century, a time when Lexington went by the title "the Athens of the West."

In 1994 the Alexander T. Hunt Civil War Museum was established on the second floor and displays relics and exhibits from the Civil War, highlighting the military career of John Hunt Morgan and Morgan's Men.

In 1987, the Trust acquired Latrobe's Pope Villa, located at 326 Grosvenor Avenue, after fire



extensively damaged portions of the building. Investigations following the fire revealed that the Villa had been built according to the original design of Latrobe, father of the architectural profession in the United States and a designer of the U.S. Capital building in Washington, D.C. Named one of Save America's Treasures by the National Trust for Historic Preservation and the White

House Millennium Council, the Pope Villa is in the midst of a 1.6 million dollar restoration project, which will ultimately reveal the classical proportions and amazing design of the structure.

In addition to managing the Hunt-Morgan House and Pope Villa, the Trust identifies significant structures in the Bluegrass that are in jeopardy of being lost forever. The Eleven Endangered List, announced on an annual basis, targets historic properties that are possibly facing demolition. The goal is to create awareness of the structures and encourage preservation rather than destruction.

Through special programs and tours, the Trust creates opportunities for adults and children to learn about and visit historic sites in our communities. Specifically, the Trust provides tours of Gratz Park, the Hunt-Morgan House and Latrobe's Pope Villa.

The Blue Grass Trust for Historic Preservation
253 Market Street
Lexington, KY 40507
(859) 253-0362