



# EXCHANGE

EXCHANGE CLUB OF KIAWAH-SEABROOK, SC

Box PMB-J 130 Gardener's Circle Johns Island, SC 29455

## Member Meeting 06/18/25 @Seabrook Island Club

### ANNUAL BUSINESS MEETING

1. Thad Peterson, President, called the meeting to order at 6:20PM and opened with prayer.
2. Chris Stephenson honored South Carolina fallen hero Army Sergeant James E. Craig and led members in the Pledge of Allegiance. *See Bio attached*
3. Introduction of guests: no guests
4. Roger Steele made a plug for the CSO event on Jan 23, 2026. There are 44 tickets available for dinner, transportation and seats at the Pops Concert.
5. After dinner, Thad presented the attached slide deck. Committee chairs who were present shared their slide(s). Thad made a motion to elect the nominees (see last slide) and the members present passed the motion unanimously.
6. Thad presented a new award, The President's Award" to Bill Nelson in recognition of his extraordinary service and dedication to the club.
7. Thad concluded by thanking all for the honor of being president and turned the meeting over to newly elected President Chris Stephenson who adjourned the meeting.

#### Next Meeting:

7/16/25 @Seabrook Island Club

Speaker: Katrina Carpenter, Founder of Jeans Angels

#### Addendums:

Attendance

Fallen Hero

Annual Business Meeting Slide Deck

Minutes submitted 6/20/25 by Lisa McDonald for Club Secretary Sally Nicoli

## ATTENDANCE

Attended?	Member	Attended?	Guests	\$s
No	Todd Anderson			
No	Alan Armstrong			
Yes	Bill Bane			
Yes	Phyllis Barber			
Yes	Wayne Billian			
Yes	Kevin Boyle			
Yes	Ed Brett			
Yes	Cathy Cleary			At Large \$45 Invoice
Yes	Wes Cleary			
Yes	David Cruse			
Yes	Bob Davis			
Yes	Fred Demler			
Yes	Art Dougherty			
Yes	Bob Driscoll			
Yes	Ronald Duncan			
No	Jim Dwyer			
Yes	Bruce Edwards			
No	Frank Farfone*			
No	George Fink			
No	Joe Foti			
No	Richard Gwyn			
Yes	Edward Heskamp			
Yes	Ed Leary			
Yes	Bob Leggett			
Yes	Bruce Ludwin			
Yes	Lars Lueders			
Yes	Alan Madison			
Yes	Lisa McDonald			
Yes	Rick McDonald			
No	Michael Morris			
Yes	Bill Nelson			
No	Sally Nicoli			
Yes	Thad Peterson			
Yes	Joel Pondelik			
Yes	Russ Preston			
Yes	Robert Quagliato			
Yes	Charles Riehl			
No	Ed Rigtrup			
No	Joe Ritchie			
Yes	Bob Schick	Yes	Shelly Schick	Guest \$45. \$50
Yes	Charlie Septer			

Yes	John Sesody			At Large \$45 ???
Yes	Robin Stebbins			
Yes	Roger Steel			
Yes	Chris Stephenson			
Yes	Marj Stephenson			
No	Joe Thompson			
Yes	Dick Trent			
Yes	Bruce Van Voorhis			
Yes	Tom Webster			
Yes	Pat Welch			
Yes	Jack Wilson			
No	David Woodman			
Yes	John Woychick			

Members. = 41  
 Guest. = 1  
 Total = 42

## TRIBUTE TO SC FALLEN HERO

Good evening, fellow Exchange Club members and guests,

Tonight, we honor the life and legacy of \*Army Sgt. James E. Craig.

From a young age, James stood out—not just for his talents, but for the sheer force of his spirit. At Academic Magnet High School, near Hollywood, South Carolina, he excelled in every arena: top of his class, a gifted musician, a star on the football field and wrestling mat. His father, Joel Craig, described him as a “thrill seeker,” recounting with a laugh, “He once flew my dirt bike over the barn roof. I saw the motorcycle flying through the air—with him on it.”

After graduating in 2000, James enlisted in the U.S. Army and trained at Fort Benning, Georgia. He was later stationed at Fort Wainwright, Alaska, where he became a sniper. When our nation was attacked on September 11, 2001, James didn’t hesitate—he requested reassignment to a unit bound for action. He was transferred to the 1st Battalion, 8th Infantry Regiment, 3rd Brigade Combat Team, 4th Infantry Division, Fort Carson, Colorado.

Around that time, he met Natalie. It was love at first sight. They married in July 2007. In one treasured photo, he’s in his Army dress blues, Infantry blue cord over his shoulder; Natalie, radiant in her white gown, clutches him tightly with pride and joy.

\*Just months later, James deployed for his third tour in Iraq. “He loved the Army. He loved what he was doing,” his family said. Those who served alongside him tell of a man who never backed down—not in games, not in life, not in duty. If you beat him at something, he’d flash that grin and say, “One more time,” or “Best two out of three.” He was determined, joyful, endlessly resilient. Whether on a mission in Mosul or playing guitar among friends in Alaska—writing songs with more heart than polish—Sgt. Craig led by example.

On January 28, 2008, while on patrol in Mosul, Iraq, Sgt. James E. Craig’s convoy came under attack. Small arms fire and improvised explosive devices destroyed their Humvee. \*At just 26 years old, Sgt. James E. Craig gave his life for our freedom—alongside four of his brothers in arms.

But James didn’t just serve. He led. He laughed. He loved. And he left behind a legacy not of sorrow, but of strength. He lived by the words: “No Reserves, No Regrets, No Retreats.” That wasn’t just a motto—it was his creed, his compass, his calling.

As a tribute to Sgt. James E. Craig and all those who have laid down their lives in service, the Exchange Club places American flags around our community several times a year. Each flag bears a yellow ribbon with the name of a South Carolina fallen hero—ensuring their sacrifice is remembered, always.

Army Sgt. James E. Craig—we salute you. We honor your service. We carry your legacy forward. Now, I invite you to please stand, as you are able, and join me in reciting the Pledge of Allegiance.



Sergeant  
James E. Craig



**Exchange Club of Kiawah-Seabrook**  
**Outgoing 2024-2025 Club Board**

**President:** Thad Peterson  
**President-Elect:** Chris Stephenson  
**Past President:** Ray Hoover  
**Secretary:** Lisa McDonald and Sally Nicoli  
**Treasurer:** Ed Heskamp  
**Americanism:** Jack Wilson  
**Child Abuse Prevention:** Charlie Septer  
**Community Health, Housing & Social Services:** Bob Schick  
**Community Service Hunger & Mentoring:** Dave Berry  
**Youth and Education:** Ed Leary  
**Handbook:** Richard Gwynn  
**Membership:** Chuck Riehl  
**Speakers:** John Reock and Rick McDonald  
**Communications:** Lisa McDonald  
**Activities:** Marjorie Stephenson  
**Dinners and Surveys:** Bill Nelson  
**Website:** Ron Schildge

**ECK-S Foundation**  
**Outgoing 2024-2025**  
**Foundation Board**

**ECK-S Past President & Chair:** Ray Hoover  
**ECK-S Vice Chair:** Bob Leggett  
**ECK-S President:** Thad Peterson  
**ECK-S President-Elect:** Chris Stephenson  
**ECK-S Secretary:** Lisa McDonald and Sally Nicoli  
**ECK-S Treasurer:** Ed Heskamp  
**At Large Director 1:** Charlie Septer  
**At Large Director 2:** Bob Mason  
**At Large Director 3:** Dennis Giannos

**Membership Anniversary Milestones**  
**In 2024**

**10 Years+**

Russ Preston  
Alan Madison  
Christine Strobel  
Bob Leggett  
Carmine  
DeGennaro  
Bill Nelson  
Dick Trent  
Joe Bauer  
Bill Bane  
Heather Paton

**15 Years+**

Wayne Billian  
Shirley Salvo  
Roger Steel  
Ed Leary  
Bob Mason  
Alan  
Armstrong  
Frank Farfone  
Mike Morris

**35 Years+**

Randolph  
Jones

**40 Years+**

Pat Welch



# Annual Business Meeting

## Meeting Agenda & Presiding

Thad Peterson

### 2023-2024 Year Reports

President: Thad Peterson

Membership: Chuck Riehl

Secretary: Sally Nicoli

Treasurer/ Financial: Ed Heskamp

Foundation: Bob Leggett (for Ray Hoover)

## Programs of Service and Club Committee Reports

**Americanism:** Jack Wilson

**Child Abuse Prevention:** Charlie Septer

**Community Health, Housing & Social**

**Services:** Bob Schick

**Community Service Hunger &**

**Mentoring:**

**Youth and Education:** Ed Leary

**Handbook:** Richard Gwyn

**Speakers:** Rick McDonald

### 2025-2026 Elections

2025-2026 Club Board of Directors

Foundation Board

## President's Report 2024 - 2025

- Accomplishments
  - Grew the Club to 109 members – Chuck Riehl
  - Total grants funded - \$178,200
  - Increased involvement with Exchange Club District and Region
  - Award for Child Advocacy Network – John Reock
  - Launched Club newsletter
- Challenges
  - Geographically concentrated on Seabrook
  - Directory revenue is softening, need new revenue sources
  - Key Club members departing – David Cruse, Chuck Riehl, Dave Berry

## A Very Special Thanks To:

- **Our Member Volunteers** - 80 Members Filled over 200 Roles & Tasks
- **Tributes to Our Fallen Heroes** - Chris Stephenson
- **Dinner Meetings** - Bill Nelson
- **Communications** – Lisa McDonald
- **ECK-S Social Golf Outing** - Marjorie Stephenson and the Activities Committee
- **Veterans Day Golf Event** - Alan Armstrong
- **Seabrook Island 5K and Half Marathon** - Pat Welch
- **Grant Night Celebration** - Ray Hoover and Bill Nelson
- **Annual Christmas Holiday Party** - Marjorie Stephenson and the Activities Committee
- **Handbook Preparation and Ad Sales** - Richard Gwyn and His Team
- **Angel Oak Banquet** - Jack Wilson and Bob Leggett
- **Anything, Anywhere, Anytime Assistance** – David Cruse
- **Our Club's "Guiding Lights"** - Bob Leggett, Ray Hoover, Bill Nelson, and Jack Wilson

## Treasurer's Report

**Exchange Club of Kiawah-Seabrook  
and  
Exchange Club of Kiawah-Seabrook Foundation**

**June 18, 2025**

## Summary of Treasurer Responsibilities

- Check Mail at Freshfields
- Maintain 3 Truist Bank accounts – Club, Club-Ad Book, Foundation
- Maintain Schwab Brokerage account – \$100 balance, no activity last 4 yrs
- Maintain accounting in Quickbooks, monthly reconciliation to bank accounts. June 30 year end. Cash basis accounting.
- Update Member Clicks for member payments via check
- Assist in Annual Grant Calculations
- Distribute financials to board at periodic meetings
- File IRS Form 990 for Club and Foundation
- File annual South Carolina non-profit registration

### Exchange Club of Kiawah-Seabrook Balance Sheet and Income Statement

Balance Sheet	Year End June 30, 2023	Year to Date June 30, 2024 (thru May 31)
Cash	106,255	141,883
Total Assets	<u>106,255</u>	<u>141,883</u>
Liabilities	-	-
Equity	106,255	141,883
Total Liabilities & Equity	<u>106,255</u>	<u>141,883</u>

Income Statement	Year End June 30, 2023	Year to Date June 30, 2024 (thru May 31)	June 1-8
Ad Book Sales	129,437	142,408	2,200
Dues	81,355	70,262	2,000
Dinners	3,928	5,956	585
Angel Oak Dinner	2,900	2,575	
CSO Outing	9,467	5,392	
Other Contributions	566	3,400	
Gross Income	<u>227,653</u>	<u>229,993</u>	4,785
Handbook	84,834	17,533	35,516
Dinners	50,985	59,256	
CSO Outing	5,248	6,986	
Admin	8,030	4,378	127
National/State Dues	10,741	11,154	
Charitable Gifts	90,700	95,058	
Other	-	-	
Gross Expenses	<u>250,538</u>	<u>194,365</u>	35,643
Net Income (Loss)	<u>(22,885)</u>	<u>35,628</u>	(30,858)



# Exchange Club of Kiawah-Seabrook Foundation

## Balance Sheet and Income Statement

Balance Sheet	Year End June 30, 2023	Year to Date June 30, 2024 (thru May 31)
Cash	37,393	20,157
Schwab Brokerage	<u>104</u>	<u>104</u>
Total Assets	<u>37,497</u>	<u>20,261</u>
Liabilities	-	-
Equity	<u>37,497</u>	<u>20,261</u>
Total Liabilities & Equity	<u>37,497</u>	<u>20,261</u>

Income Statement	Year End June 30, 2023	Year to Date June 30, 2024 (thru May 31)
Donations	88,396	38,320
Fundraising Events	27,850	25,910
Other	<u>917</u>	<u>775</u>
Gross Income	<u>117,163</u>	<u>65,005</u>
Angel Oak Dinner	17,162	3,016
Admin	1,638	1,724
Charitable Gifts	96,264	77,500
Other	<u>-</u>	<u>-</u>
Gross Expenses	<u>115,064</u>	<u>82,240</u>

## Membership Report 2024 - 2025

- June 2025 – 114 members, a gain of 5 from a year ago
- 9 new members
- Received an award from the Exchange Club District for the most growth in a large club

# Foundation Report

## Members Continue to Give Generously

### Grant Funding Raised by:

#### Fund Raisers

\$40,400 netted by the support of members and guests at the Angel Oak Dinner  
\$15,000 from the 2023 Bohicket Run  
\$2,500 from the ECK-S Golf Outing

#### Donations

\$15,000 from Members for Grants  
\$20,000 from members for non-grant distributions  
\$9,600 from non-Members

**Total Net Available for Grants from ECKS Foundation- \$82,500**

### Contributions Tip

Apply part of your Minimum Required Distributions from IRAs as a very tax-efficient way to donate to the Foundation

Every added donation \$ goes 100% to our charities

## Programs of Service Reports

- Americanism:** Jack Wilson
- Child Abuse Prevention:** Charlie Septer
- Community Health, Housing & Social Services:** Bob Schick
- Youth and Education:** Ed Leary
- Handbook:** Richard Gwyn
- Speakers:** Rick McDonald

## **Exchange Club of Kiawah-Seabrook**

### **2025-2026 Club Board Nominees**

**President:** Chris Stephenson  
**President-Elect:** Lisa McDonald  
**Past President:** Thad Peterson  
**Secretary:** Sally Nicoli  
**Treasurer:** Ed Heskamp  
**Americanism:** Jack Wilson  
**Child Abuse Prevention:** Charlie Septer  
**Community Health, Housing & Social Services:** Bob Schick  
**Community Service Hunger & Mentoring:** Open  
**Youth and Education:** Ed Leary  
**Handbook:** Richard Gwyn  
**Membership:** Open  
**Speakers:** Rick McDonald  
**Communications:** Lisa McDonald/Thad Peterson  
**Activities:** Marjorie Stephenson  
**Dinners and Surveys:** Bill Nelson  
**Website:** Ron Schildge

## **ECK-S Foundation**

### **2025-2026**

### **Foundation Board Nominees**

**ECK-S Past President & Chair:** Thad Peterson  
**ECK-S Vice Chair:** Bob Leggett  
**ECK-S President:** Chris Stephenson  
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**At Large Director 1:** Charlie Septer  
**At Large Director 2:** Bob Mason

## EXCHANGE CLUB PRESIDENT'S AWARD

### THIS HEREBY ACKNOWLEDGES THAT BILL NELSON IS RECOGNIZED FOR EXCEPTIONAL CONTRIBUTIONS TO THE SUCCESS OF THE EXCHANGE CLUB

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The President's Award has been created by the Club and Foundation boards to recognize and celebrate the accomplishments of a Club member who has made a significant contribution to the Club and its members.

Tonight, it's my distinct honor to present this President's Award to Bill Nelson, a member who truly embodies the spirit of service that defines our organization.

Since joining the Exchange Club on March 7, 2011, Bill has been the kind of member every organization dreams of having. He doesn't just participate – he leads, he innovates, and he gets things done.

Bill's contributions span virtually every aspect of our club's operations. As a member of our Speakers Committee, he ensures our meetings run smoothly by contributing to speaker selection and managing audio-visual needs, while producing the speaker biographies that grace our tables each week

As Chair of our Dinners and Surveys Committee, Bill has transformed how we handle our social events. He manages complex scheduling, coordinates invitations and RSVPs, and provides the crucial support that makes our dinner events successful. His post-event surveys help us continuously improve our member experience.

Bill's is also a valuable member of our Directory Ad Sales Team, consistently bringing in the advertising contracts that help fund our handbook each year.

Beyond his committee work, Bill is our go-to person for so many essential tasks. He designs and produces PowerPoint presentations for Grant Night and other special events, operates our computer and projector systems at meetings, and voluntarily captures the memories of our events through photography.

As if that weren't enough to justify the award, Bill plays a leadership role in our signature Seabrook 5K & Half Marathon, coordinating volunteer assignments and communications that make this major fundraising event possible year after year.

Bill's dedication across so many areas has earned him the distinction of being a perpetual member of our Board of Directors – a testament to his consistent, invaluable service.

Tonight, we recognize Bill Nelson not just for what he does, but for how he does it – with quiet competence, unwavering reliability, and genuine care for our club's mission. He makes us all better, and our organization stronger.

Congratulations, Bill, and thank you for your exceptional service to the Exchange Club.

## **The Exchange Club of Kiawah-Seabrook**

### **Dinner Meeting Agenda**

**June 18, 2025, 5:30 PM**

1. 6:20 – Ring Bell
2. 6:25 – Welcome
  - a. Introduction of guests
3. Prayer –

Let us bow our heads in reflection:

Thank you for the remarkable spirit of service that brings us together today.

We gather in appreciation of each member of the Exchange Club, whose dedication and commitment have strengthened the fabric of Johns and Wadmalaw Islands. Through hours of volunteer service, community projects, and acts of kindness, you have demonstrated that the true measure of a community lies not in its size, but in the size of its heart.

To our officers who have guided this organization throughout the year—your leadership has been the steady hand that has directed our collective efforts toward meaningful impact. Your vision, patience, and tireless work behind the scenes have enabled every success we celebrate today.

We acknowledge the ripple effects of your service: the families helped, the young people mentored, and the bonds of fellowship strengthened. Your commitment to the Exchange Club's mission of service above self has created lasting positive change that extends far beyond what any single person could accomplish alone.

As we go forward, may we carry with us the inspiration drawn from this gathering of dedicated individuals. May we remember that in serving others, we find our own purpose, and in building up our community, we build something greater than ourselves.

In humble appreciation, we say Amen

4. Fallen hero and pledge
5. Announcements (complete by 6:40)
  - a. Roger Steele –
6. Annual Business Meeting

2023-2024 Year Reports

President: Thad Peterson

Membership: Chuck Riehl

Secretary: Sally Nicoli

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Foundation: Bob Leggett (for Ray Hoover)

## Programs of Service and Club Committee Reports

Americanism: Jack Wilson

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Community Health, Housing & Social Services: Bob Schick

Community Service Hunger & Mentoring:

Youth and Education: Ed Leary

## 2025-2026 Elections

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Foundation Board