

Love Where
You Live.



CELEBRATING
30 years
OF
GENEROSITY



Simplified Charitable Giving

ANNUAL
REPORT
2019

Thank you for taking the time to review our 2019 annual report for East Texas Communities Foundation (ETCF). East Texas is full of unique communities and ETCF is proud to assist philanthropists across our diverse region.

This annual report is themed “Love Where You Live” to remind each of us that philanthropy is as unique as each individual and organization in our communities. When needs arise for the services of a nonprofit organization in one of our East Texas towns, there are always generous community philanthropists stepping up to support those efforts. From Toledo Bend to Paris, there are nonprofits serving the needs of our citizens with education, cultural arts, humanitarian aid, healthcare and religious programs. We are all fortunate to call East Texas home.

For the past 30 years, ETCF has been helping the people of East Texas create and utilize charitable funds to reach their philanthropic goals. Among other useful information about the Foundation, this annual report highlights a few of the nonprofit organizations which received grants from ETCF in 2019.

2019 was a year of significant economic growth. More than \$10 million in contributions were made to the Foundation, while over \$12 million in grants were distributed to support local, national and international charities.

For many individual donors, 2019 was a great year to create or add to a donor-advised fund as a result of the robust economy. Resources dedicated to create charitable funds during times of prosperity are great resources that can be utilized in future years to support charities. Likewise, reserve funds and endowments afford nonprofits access to sustainable resources to help them during challenging times.

Our staff is available to meet and discuss your charitable interests and help you determine if establishing a fund at ETCF can help you meet your philanthropic goals.



Kyle L. Penney
President,
East Texas Communities Foundation



Tony Morgan
Board Chairman,
East Texas Communities Foundation



ETCF President, Kyle Penney, celebrates 30 years of generosity with a few of ETCF’s founding board members and their spouses. Pictured left to right: Kyle Penney, Bill Martin, Allen Burt, Arlene Burt and Barbara Shoftman.

STAFF

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**To speak directly with one of our staff please call
866-533-3823 or 903-533-0208**

2019 Financial Summary

Total Assets 12/31/18.....	\$96,420,613
2019 Contributions	\$10,883,756
2019 Grants	(\$12,020,741)
Net Investment Activity	\$15,555,273
Net Operating Expenses	(\$785,152)
Total Assets 12/31/19.....	\$110,053,749

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Community Improvement: The Whitehouse Police Department is a little closer to reaching their \$21,000 goal to add a K9 Unit to their police department thanks to a grant from ETCF. The project cost includes the cost of the four-legged officer, training, patrol car changes, equipment and other necessities.



Historical Preservation: The Texas State Railroad Society (TSRS), based inside The Railroad Heritage Center located at 808 W Oak St in Palestine, Texas, received a grant from ETCF to support future train car exhibits. The purpose of the TSRS is to enhance the experience of visitors to the Texas State Railroad in Rusk, Texas.



Education: The Fannie Brown Booth Memorial Library in Center, Texas, received a grant from the John Harris Community Fund to purchase new illustrated novels. The Fannie Brown Booth Memorial library provides free services to residents living in Shelby County and surrounding areas.



Education: The Roy and Betty Erickson Charitable Fund for Nursing held at East Texas Communities Foundation awarded a grant to Texarkana College Department of Nursing for the purchase of simulation lab equipment and hospital beds for classroom and lab use.

ETCF Honored at Philanthropy Day Event.

The East Texas chapter of the Association of Fundraising Professionals recognized East Texas Communities Foundation as Outstanding Philanthropic Foundation for 2019. Pictured left to right: Dennis Cullinane, Tony Morgan, ETCF Board Chair, and Whitney Patterson.



Women's Philanthropy Summit Provides Practical Advice to Attendees.

ETCF partnered with the Women's Fund of Smith County and the AFP Chapter of East Texas to host a Women's Philanthropy Summit. The summit's keynote speaker, Kathryn Miree, shared practical advice woven with witty first-hand accounts from her career as an estate attorney, mother and philanthropist.

Pictured left to right: Kathryn Miree, Kyle Penney, Kay Latta, Sharon Howell and Kristen Seeber.



{ 2019 }

ETCF fund holders recommended grants in excess of

\$12M

ETCF staff processed 1,719 grant recommendations

{ }

In 2019, ETCF awarded **\$12 million** in grants and scholarships.

In addition, individuals, families, businesses and organizations **contributed over \$10.8 million** to ETCF to establish new charitable funds or supplement existing funds.



106 students were awarded scholarships for the 2019-20 academic year.

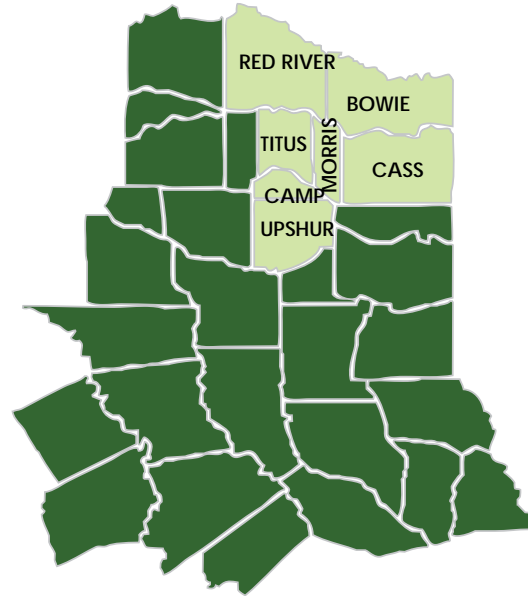
Recipients were selected from **2,350 applicants** for 68 different scholarships available at ETCF.

Love Where You Live.

Red River • Bowie • Titus • Morris • Cass
Camp • Upshur • Marion



Education: The Burt and Nancy Marans Charitable Fund at ETCF made a grant to the Naples Public Library to assist with the Summer Reading Program. The library serves approximately 5,000 people in Naples and the surrounding communities.



Human Services: A grant to Titus County Cares benefits their Food4Kids Backpack Club which provides kid-friendly food to low income children. Pictured are Northeast Texas Community College softball players filling sacks with donated food to be distributed to area schools.

Youth Development: Grants made to Camp Gilmont helped provide scholarships for students to attend camps. Located in Upshur County, Camp Gilmont's mission is to offer a place where people can grow in mind, body, and spirit by experiencing God's love.



Education: Carlos Tapia, from Mt. Pleasant High School, was awarded the Hugh P. Brown Memorial Scholarship. The Hugh P. Brown Memorial Scholarship was created by Mr. Brown's family to support students studying automotive technology. Pictured left to right are Martin Tapia, Carlos Tapia and Andrea Tapia.

Texarkana nonprofits gathered at the Caddo Area Council of the Boy Scouts of America building to share best practices prior to East Texas Giving Day 2019. Back row, pictured left to right: Monica Bruner with St. James Day School, Katherine Graves with HandsOn Texarkana, Beth Filla with ETCF, Tyler Joyce with Caddo Area Council BSA. Front row, left to right: Holly McFarlin with ETCF, Fred Markham with Texas Pioneer Foundation, Sherry Young with Opportunities Inc., Amy Lemley with HandsOn Texarkana and Linda Willis Caddo Area Council BSA.

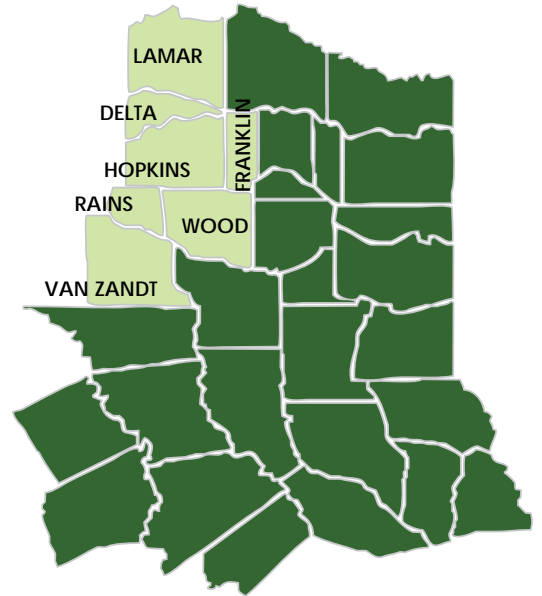


Love Where You Live.

Lamar • Delta • Hopkins • Franklin • Rains • Wood • Van Zandt



Education: Hayden Alcalan, a graduate of Grand Saline High School, was the recipient of the Adam Carroll Memorial Scholarship. This scholarship is awarded to a Grand Saline High School graduating senior who has participated in high school athletics or cheerleading.



Human Services: Hooves & Halos received funding to assist with their fall playday from the Mrs. A.D. Francis Endowment Fund. Hooves and Halos is a Christian based organization that provides equine programs for individuals who are physically or mentally challenged, discouraged or disadvantaged. The purpose of the A.D. Francis Endowment is to support and build the capacity of charities serving the people of Winnsboro, Texas.



Human Services: The Mount Vernon Music Association received a grant from the Evans-Merrick Music Fund to provide a free summer children's concert. The purpose of the Evans-Merrick Music Grants Fund is to support and encourage traditional or classical music activities in the East Texas region. Programs must be offered free to the public.

Kellen Floyd, a graduate of Paris High School, was the recipient of the Jackson Huse Scholarship. This scholarship was created in the loving memory of 6 year-old Jackson who lost his battle with brain cancer. The scholarship was awarded for the first time in 2019, the year Jackson was to have graduated high school, to Floyd, who also lost his sibling.

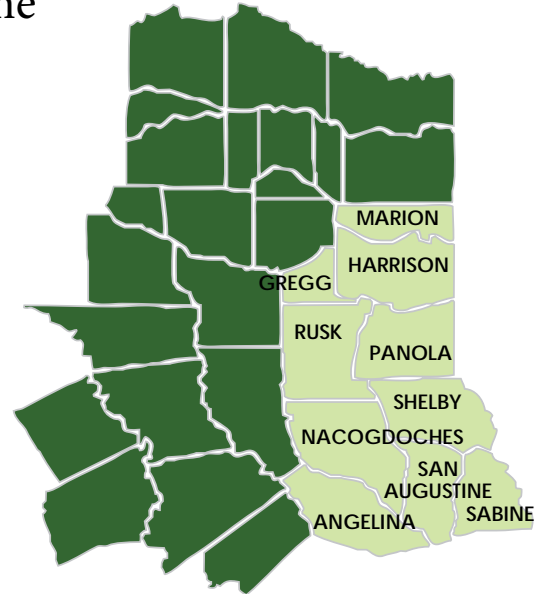
Pictured: Kellen Floyd smiles beside Jackson's mother, Johna Tritt at Paris High School.



Love Where You Live.

Gregg • Harrison • Rusk • Panola • Nacogdoches • Shelby • Angelina
 San Augustine • Sabine

Arts & Culture: In October, The Longview Symphony presented the first in its series of free lunchtime recitals featuring the music of Bach. Each concert was held on a Friday at a church in downtown Longview and showcased local musicians. Grants from the Evans-Merick Music Fund at ETCF helped underwrite the series.



Education: A grant was made to the Lufkin High School Alumni Association to assist in their commitment to provide scholarships to Lufkin High School students. Since its formation, the LHSAA has made a commitment to continuing education, awarding 2,312 scholarships totaling \$2,267,865 to graduates of LHS. Pictured left to right: Wyatt Leinart and Dakota Stockman.

Education: Thirteen computers were replaced at the Longview Public Library thanks to a grant made to the Friends of the The Longview Public Library. The library offers free computer classes each month to patrons wishing to improve their knowledge from basic keyboarding to advanced Excel.



Human Services: The City of Center, Texas received funding to assist in creating an entrance gate for the Center Soccer Park. The newly renovated soccer park is part of the ongoing Ballard Street Park conversion into the Center City Park.

The park is home to both the Shelby County Youth Soccer Association and Center High School Soccer Teams, and covers about 21 acres. Upon completion, the complex will have three adult soccer fields which can be divided into smaller fields for younger players.



Human Services: **Shelby County Children’s Advocacy Center** received funds from the John Harris Community Fund to purchase forensic interview equipment in order to better preserve evidence as part of an investigation for victims of suspected abuse. On average, Shelby County Children’s Advocacy Center serves 200 unique child victims each year.

Fund Created to Honor Family Legacy and Love for Golf



After the passing of Arnold T. Sikes in late 2018, his wife of 56 years, Sharon Sikes, felt she was removing his name from so many things that they had spent years creating together. “After the passing of a spouse, you have to remove their name from all your accounts and records. I hated it,” said Sikes. “I knew I wanted to add his name to something to create a lasting legacy.”

During his lifetime, Arnold was a supporter of the First Tee of Greater Tyler. Often times, Arnold was seen driving neighborhood children on his golf cart around Hollytree Golf Course, sharing stories and his passion for the game.

The Arnold T. Sikes Memorial Endowment Fund benefiting the First Tee of Greater Tyler was created to honor Mr. Sikes and continue his passion for youth development through the game of golf. “I am so blessed to do this in honor of his memory,” said Sikes. “Working with the staff of ETCF made the process simple and efficient. I know this fund will do great things, just like Arnold would want.”

Stewart Fund Supports Education



Grants from the Gladys and Thomas “T.B.” Stewart Community Education Fund at East Texas Communities Foundation were awarded to the Literacy Council of Tyler and East Texas Youth Orchestra.

The East Texas Youth Orchestra, Inc. received funds to help students attend instrument specific and full orchestra clinics, while the grant to The Literacy Council of Tyler supported their CORE Programs, including Adult Basic Education, English as a Second Language, and GED prep.

Mr. and Mrs. Stewart desired to make a lasting contribution to their community. They valued their faith and the role of education which led them to serve as positive role models to people of all ages. In addition to establishing a scholarship fund at ETCF and donating historic property to the City of Tyler, the Stewart Community Education Fund was established to provide financial support for public charities serving Smith County, which offer educational programs and materials to individuals.

Fund Honors Retiring Judge

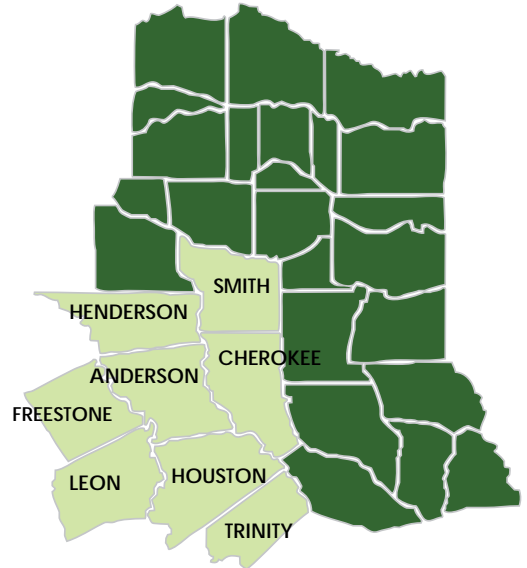


Judge Carole Clark served on the 321st District Court, Family Division in Tyler, Texas for many years. To celebrate her years of service, friends and colleagues created a fund in her honor that will assist child advocates with training at the “Karyn Purvis Institute of Child Development” at TCU. The training provided through the institute will equip professionals with the skills needed to assist children from “hard places” navigating family court.

Pictured left to right: Judge Carol Clark and Barbara Bass.

Love Where You Live.

Smith • Henderson • Cherokee • Anderson
Freestone • Leon • Houston • Trinity



Environment: The East Texas Arboretum, located in Athens, Texas, received a grant for a new tiller and compost for soil improvements from the Edwin A. Blue and Janice Owen Miller Charitable Fund at ETCF. Produce grown in the vegetable garden was donated to the Henderson County Food Pantry.



Religion: Troy Kriechbaum, President & CEO of Encouragement FM, accepts a grant check from ETCF President, Kyle Penney. The grant partially funded the launch of a Hispanic Christian music radio station titled Fuzión 102.3 and 103.1.



Education: Lorri Allen, wife of Mark Allen, visits with Madelynn Bragg, Eustace High School graduate. Bragg was the 2019 recipient of the Mark W. Allen Memorial Scholarship and plans to attend the University of Texas in Austin to study English Language/ Literature.

Tyler Area Ambucs, the city of Tyler Parks and Recreation Department and area families welcomed the opening of Southside Park playground. The park features ramps, swings and slides that accommodate people that have mobility issues. The Southside Park project fund held at ETCF provided grant support for the park.



23% of donors indicated they were first-time donors to the organization

Percentage of Donors that Covered the Fees 76%

\$651,682 Total Matching Funds Raised by Nonprofits

185 TOTAL NUMBER OF NONPROFITS

EAST TEXAS GIVING DAY



\$1,308,861

raised in 18 hours from 3,603 Gifts



\$1.3 Million Raised for Area Nonprofits through East Texas Giving Day

Charities in East Texas benefited from the generosity of 3,603 gifts during East Texas Giving Day 2019.

The online fundraising effort began at 6:00 a.m. on Tuesday, April 30th, and ended at midnight. Donors contributed \$1,308,861 to support causes they care about in 32 East Texas counties.

“East Texas residents showed their generosity and connection to their communities,” said Kyle Penney, President of East Texas Communities Foundation, which hosted the event. “Nonprofit organizations spent countless hours getting the word out about the needs facing our region, and our region responded by do-

nating. It’s a community effort for which we can all be proud.”

During East Texas Giving Day, nonprofit organizations encouraged their donors and the public to make charitable donations online at www.EastTexasGivingDay.org.

Donors could choose among 185 participating charities, and make donations starting at just \$10. Throughout the day, some donations were eligible to be matched by donations already pledged by individuals to select nonprofits.

East Texas Giving Day benefited nonprofits of all sizes. Smith County charities led the charge with The Mentoring Alliance receiving the most overall contributions

for a total of \$225,136, followed by Grace Community School raising \$84,880 and Bethesda Health Clinic with \$53,603.

Media sponsors included: KYTX CBS19, KTEK NBC 56 and KFXK Fox 51, KLTV ABC 7, KTRE ABC 9 serving Lufkin, Jack FM 106.5, KYKX 105.7 of Longview, KVNE 89.5 and KGLY 93.1, Mix 107.7 and KOYN 93.9 of Paris Texas, KALK 97.7 and KSCN 96.9 of Mt. Pleasant, KISS FM 92.7 Paris, KICKS 105.1 in Lufkin and KZQX 100.3 Tatum, QXFM 97.9 in Tyler, Townsquare Media in Texarkana, Tyler Today Magazine, 4 States Living and Butler Creative. Media sponsors helped publicize Giving Day with online public service announcements and live broadcasts throughout the day.



ETCF President Kyle Penney prepares for an on-air interview to promote advanced giving with KETK East Texas Live host, Mye Owens. KETK 56 is a valued media partner for promoting East Texas Giving Day.



ETCF host educational trainings for Giving Day participants including social media marketing, donor stewardship and board development. Pictured Left to right: Beth Filla, Holly McFarlin and Longview Dream Center Executive Director, Shonna Barlow.

Money Raised on Giving Day 2019 Helps Fund Bear, Tiger Enclosures at Black Beauty Ranch.

As a participant in East Texas Giving Day, Traci Hanson with Cleveland Armory Black Beauty Ranch, in Murchison, Texas, knew having a matching fund partner could help her campaign.

What she didn’t know was that with the help of an anonymous fund holder at ETCF and some creative marketing, her event goal of \$10,000 would be doubled.

“Going into Giving Day we knew we were close to our goal for building a larger, more natural bear enclosure, but we needed a push to get over that final fundraising hurdle,” said Hanson. “We were thrilled when an ETCF donor

generously offered a matching gift for our Giving Day campaign.”

Encouraged by the anonymous donor’s support, funders connected to the mission of Black Beauty added to the match pool.

“East Texas Giving Day was an excellent way for our organization to plug donors in to help us reach a goal,” said Hanson. “Through our Facebook and email campaigns we were able to raise \$20,116.”

Black Beauty Ranch is about to wrap up construction on Phase II of a Wildlife Habitat facility that will provide a permanent homes for rescued tigers and bears. This naturally wooded area con-

sists of three one-acre habitats which will better emulate the animals’ physical, social and psychological needs.



Sammi, a black bear living at Black Beauty Ranch, enjoys a fall pumpkin. Photo by Maura Flaherty, Wildlife Caregiver at Black Beauty Ranch.

FUND TYPES

People look to East Texas Communities Foundation to help fulfill their charitable and financial goals. Often, people are looking for advice on how to address an issue or support an organization that is important to them. Sometimes, they want to use a personal asset – such as cash, securities, business interests, real estate, mineral interests, retirement distributions, etc. – to support philanthropic interests. ETCF works with individuals, families, businesses, and nonprofit organizations, to help determine which of our five fund offerings would meet their needs now and in the future



DONOR-ADVISED FUND

Donor-Advised Funds are a flexible and easy way to support the organizations and issues you care about—both now and in the future. As a donor, you may make gifts to your fund at any time, taking a tax deduction for the year in which the gift is made. You, or your designated advisor, may then make grant recommendations from the fund at any time to charities of your choice. A donor-advised fund may be created by an individual, family, group, or organization to support public charities.



SCHOLARSHIP FUND

Scholarships are often established by individuals or organizations to support academic interests or to memorialize a loved one. Scholarship funds provide deserving student's the opportunity to attend a certain school or pursue a field of study which was meaningful to a donor. Businesses and civic groups may set up scholarship funds to encourage students to pursue a particular field of study, honor a founder or long-time employee, or to encourage the next generation of community leaders.



DESIGNATED FUND

A Designated Fund can be customized to support several specific charities or make grants within a predetermined field-of-interest or for a specific project. A designated fund may utilize an advisor, a committee, or a prescribed formula to make annual grants as appropriate to fulfill the charitable objectives of the donor. A designated fund may be established with a limited duration or endowed to provide perpetual support.



NONPROFIT FUND

Nonprofit organizations and/or their donors can establish a short-term fund or permanent endowment fund to support a single charity. ETCF provides investment management and can help charities receive complex assets such as real estate or business interests. An endowment fund sends the message to the community that an organization is building for the future while a non-permanent fund can be used to address current needs.



UNRESTRICTED FUND

The Unrestricted Charitable Fund offers the broadest option for charitable giving in your community. This fund is used to address East Texas communities' most pressing needs, as those needs change over time. By making a gift or bequest to the unrestricted fund, you are helping support East Texas charities—forever.

What is a Donor-Advised Fund?

Donor-Advised Funds are a flexible and easy way to support the organizations and issues you care about—both now and in the future. As a donor, you may make gifts to your fund at any time, taking a tax deduction for the year in which the gift is made. You, or your designated advisor, may then make grant recommendations from the fund at any time to charities of your choice. A donor-advised fund may be created by an individual, family, group, or organization to support public charities.



Make an Initial Donation



Professionally Managed Investment



Recommend Grants to 501c3 Charities

Donor-Advised funds are a flexible and easy way to support organizations and issues you care about.

A donor can donate cash, publicly traded securities, real estate, mineral interests, or business interests.

Donors may be eligible for an immediate tax deduction at the time the donation is made.

Donors can support virtually any IRS-qualified public charity with their donor-advised fund by submitting a grant recommendation either online or by submitting a written form by email or fax.

Donors can make additional contributions over time, when the timing makes sense to meet financial, tax or charitable objectives.

While you're deciding which charities to support, your donation can potentially grow tax-free based on your investment preferences, making available even more money for charities.

ETCF offers three investment strategies managed by an outside professional firm. Each of the investment portfolios has an actively managed and passive index fund option. If your fund balance is over \$500,000, you can recommend an outside wealth advisor to work with ETCF to manage the fund.

Our investment committee works closely with all advisors, ensuring transparency and adherence to ETCF policies and procedures.

ETCF offers a growing suite of donor services that help make your philanthropy more effective and our community stronger.

Once you submit a grant recommendation, we take care of the details: checking the nonprofit status of the organization followed by sending the grant check and acknowledgment letter. You have 24/7 access to our online grant-making platform where you can view your giving history, fund balance and recommend distributions to nonprofits. Grants can also be made anonymously.

We can also provide you with information about local nonprofit organizations, including specific groups or those working in a particular area of interest.

Why choose ETCF? Compare your options.

ETCF is a public charity, governed by a board of community leaders. We offer several advantages not available to private foundations– for example, higher tax deductibility for charitable contributions and professional administrative support. A comparison of your charitable options can be reviewed below.

Gifts-Options and Considerations	Direct Gift to Charity	Private Foundations	East Texas Communities Foundation	Supporting Organizations
Amount Deductible				
Publicly Traded Securities	FMV*	FMV*	FMV*	FMV*
Other Appreciated Property	FMV*	Limited to Cost Basis	FMV*	FMV*
Percentage Limitations				
Cash Gifts	60% of AGI**	30% of AGI**	60% of AGI**	60% of AGI**
Appreciated Property	30% of AGI**	20% of AGI**	30% of AGI**	30% of AGI**
Other Considerations				
Excise Tax on Investment Income	No Investment Income	1.39%	None	None
Excess Business Holding Limitations	Yes	Yes	Yes	Yes
Donor Control	Full	Legal	Advisory	Donor can be minority board member
Anonymity	Yes	No. Must file detailed returns on grants, investments, fees, salaries, etc.	Yes. Donors and grants can be private. Foundation can serve as a buffer between donor and grant-seekers	Limited
Distribution Requirement	No	Yes– 5% annually	No	No
Incorporation, Tax Exemption, Audit/ Tax Returns, Directors/ Officers Insurance, Grants Management, Compliance	Not Applicable	Responsible for all functions; foundations less than \$3 million have average expenses ranging from 3-5%, decreasing as the assets grow larger	ETCF handles all administration and investment management with a tiered fee ranging from 1.00 -2.25%, decreasing as the assets grow larger depending on the choice of investments.	Attached to Communities Foundation yet remains independent– fees are generally between private foundations and communities foundations
Primary Disadvantages	Timing –Gift must be made in same year as income to maximize tax benefits	Compliance, tax reporting, annual payout requirements, tax on investment income, contribution restrictions.	Advisory vs. Ownership control	Minority control, does not eliminate separate accounting and tax reporting
Primary Advantages	Control, family identity	Control, independence, family identity, administrative compensation permitted	Deductibility, nonprofit knowledge, flexibility, permanence, tax-free growth and no administration	Deductibility, separate board, family identity, more apparent control

*Fair Market Value **Adjusted Gross income

Make a Difference- Exactly As You Intend

Grants from funds held at ETCF are directed to a variety of charitable purposes. If you are seeking a meaningful way to provide ongoing support for a charitable organization or purpose close to your heart, please consider the benefits of creating your own named fund at East Texas Communities Foundation. We welcome the opportunity to help you custom design a fund that will make a difference today and for the future—exactly as you intend.

PARTIAL LIST OF ETCF FUNDS

Donor-Advised Funds

Anonymous Donor-Advised Funds (8)
 Adams Family Donor-Advised Fund
 Sidney and Anna Lee Allen Charitable Fund
 Allison Family Donor-Advised Fund
 Melinda and Rick Allen Charitable Fund
 Anderson-Yukelja Donor-Advised Fund
 Jeff and Sissy Austin Donor-Advised Fund
 Jeff and Jackie Badders Charitable Fund
 Bagot Family Charitable Fund
 Edgar and Lisa Baker Charitable Fund
 Glenda Barrett Charitable Fund
 Barbara and Billy Bass Charitable Fund
 Lisa and David Beard Donor-Advised Fund
 Carl and Evelyn Bochow Donor-Advised Fund
 Thomas W. Bochow, MD Donor-Advised Fund
 Marilyn Joan Brinkman Donor-Advised Fund
 Brad and Ann Brookshire Donor-Advised Fund
 Tim and Michelle Brookshire Family Fund
 Brown Family Donor-Advised Fund
 Frank J. Budde and Marilyn Budde Fund
 Joyce Buford Donor-Advised Fund
 Burt Family Fund
 Shirley and Don Chase Donor-Advised Fund
 Dirk and Patti Coleman Charitable Fund
 Cordell Family Donor-Advised Fund
 Betty Danielson Memorial Fund for Youth
 Suzanne Hunt Davis Donor-Advised Fund
 Mary C. Decker Charitable Fund
 Denarii Fund
 Dent Charitable Fund
 Dimond Family Charitable Fund
 Karleen Draper Donor-Advised Fund
 Larry and Dana Fleming Charitable Fund
 Johnna and Kevin Fullen Charitable Fund
 Gertrude Windsor Garden Club Fund
 Gerard Family Donor-Advised Fund
 Emily and Gerald Gibson Fund
 Greater Longview United Way Donor-Advised Fund
 Jim and Leigh Gomillion Charitable Fund
 Dr. and Mrs. Charles Gordon Donor-Advised Fund
 Joyce and Zelik Greenberg Donor-Advised Fund
 Fred and Ginger Haberle Charitable Fund
 Roy and Helen Hallmark Fund
 Brian & Jan Hancock Donor-Advised Fund
 Don and O'Marie Harvey Charitable Fund
 Tim Hayward Medical Lecture Fund
 HPP Fund
 Presley C. and Virginia B. Hudson Donor-Advised Fund
 Hurst Family Fund
 H.T. and Laura Hyde Charitable Fund
 Robert B Irwin Foundation
 Jackson Family Charitable Fund
 Jasper Ventures Employee Match Program Fund
 Erin and Brent Jasper Charitable Fund
 Carrie-Ann and Jason Yearly Charitable Fund
 Jasper Ventures Employee Directed Giving Fund
 Jasper Family Fund
 Jane E. and Les Campbell Charitable Fund
 Jon and Susan Jasper Charitable Fund
 Phil and Sharon Jenkins Charitable Fund
 John and Lisa Jones Charitable Fund
 Kalos Foundation
 Karen Faulkner Key Donor-Advised Fund
 Elizabeth Faulkner Kirwan Donor-Advised Fund
 Richard and Susan Knarr Charitable Fund
 Lowery Donor-Advised Fund
 Lujan Family Charitable Fund
 Rod and Merle Mabry Family Charitable Fund
 Jack and Glenda Mann Donor-Advised Fund
 Matthews Family Charitable Fund
 Mauldin Family Donor-Advised Fund
 McCook Family Giving Fund
 Michael and Fritter McNally Donor-Advised Fund
 McSwane Family Charitable Fund
 Barre and Gene Monigold Fund
 Vicki and Tony Morgan Charitable Fund
 Stacy and Reid Martin Family Charitable Fund
 F. William and Mary Jo Martin Donor-Advised Fund
 Niblack Charitable Fund
 Nichols Family Fund
 LeGrande and Cassandra Northcutt Donor-Advised Fund
 Olivia Smith "For Good" Donor-Advised Fund
 Julie and Terry Pace Charitable Fund
 Pangburn Charitable Fund

Pioneer Charitable Fund
 William Pirtle Donor-Advised Fund
 Rex and Janice Pritchard Charitable Fund
 Raabe Family Charitable Fund
 Ramey Family Fund
 Riehm Family Fund
 Riesterberg Family Charitable Fund
 Cynthia and Whit Riter Donor-Advised Fund
 Ken and Joyce Roddy Donor-Advised Fund
 John and Carol Ann Rowland Charitable Fund
 Sam Roosth Foundation Fund
 Scholtes Family Charitable Fund
 Schuler Family Charitable Fund
 Bonnie Schulz Memorial Fund
 Fred and Carol Smith Family Donor-Advised Fund
 Pam and Thomas Smith Donor-Advised Fund
 Stephens Family Fund
 Frances D. Swann Donor-Advised Fund
 Paul and Carla Szafraan Charitable Fund
 Summers Foundation
 T.L.L. Temple Foundation Community Fund
 Tokoph Family Charitable Fund
 The Triumph Donor-Advised Fund
 Harry and Gail Wallace Donor-Advised Fund
 Cecil and Bernie Ward Family Donor-Advised Fund
 Amy and Tom Woldert Donor-Advised Fund
 Kim and Greg Wright Charitable Fund
 Youth Challenge Memorial Fund

Designated Funds

Sara-Catherine Shirley Memorial AMBUCS Scholarships
 The ARC of Smith County Designated Fund
 Baxter Family Charitable Fund
 Bethesda Health Clinic Designated Fund
 Birdwell Elementary School Fund
 Blankets and Bears Fund
 Brownsboro ISD Education Foundation
 Budde Family Designated Fund
 Janette L. Collard Faith Baptist Church Designated Fund
 Choir School of East Texas Scholarship Fund
 Judy Carole Clark Trauma-Informed Training Fund
 Dennis and Terry Darryl Temple Beth El Donor Designated Fund
 Discovery Science Place Designated Fund
 Roy & Betty Erickson Charitable Fund for Nursing
 Endowment Fund for the Benefit of the East Texas
 Symphony Orchestra Association and the University of
 Texas at Tyler for the Braithwaite Performing Arts Program
 Evans-Merrick Music Grants Fund
 Mrs. AD Francis Endowment Fund
 The Hometown Garden Fund
 John Harris Community Fund
 Carolyn F. Hyman Fund
 Karen Key Baylor Scott & White Dallas Foundation
 Designated Fund
 Literacy Council of Tyler Operating Reserve
 Luther's Children Educational Fund
 Marys Chenevert Memorial Fund for Courageous Youth
 Burt and Nancy Marans Charitable Fund
 Edwin A. "Blue" and Janice Owen Miller Charitable Fund
 Nacogdoches HOPE Designated Fund
 Oil Patch Benevolence Fund
 R.F. and Jessie Shaw Fund
 Smith County Bar Foundation Designated Fund
 Southside Park Project Fund
 Gladys and Thomas "T.B." Stewart Community Education
 Fund
 Ric Summers Memorial Fund
 Palestine University Academy Fund
 UT Tyler Palestine Campus Designated Fund
 D. Coulter Templeton Fund
 Therapeut Fund
 Tributary Retreat Center Donor Designated Fund
 John Wingate Trullit Log Cabin Fund
 Tyler Library Foundation Fund
 City of Tyler Park Foundation
 University of Texas at Tyler Foundation Project Fund
 Connie Wakefield Fund
 Winsboro Community Resource Center Designated Fund
 Women's Fund of Smith County Endowment

Nonprofit Endowment Funds*

Dermatology Associates of Tyler Minority Scholarship Fund
 All of St. Sains Episcopal School of Tyler
 Alzheimer's Alliance of Smith County Endowment Fund
 The Arc of Smith County Endowment Fund

C.C. and Brenda Baker Endowment for PATH
 Bethesda Health Clinic Endowment Fund
 Endowment Fund for the David G. Braithwaite Chair in
 Biochemistry for the benefit of the Univ. of Texas at Tyler
 A. M. and Lillian Brown Memorial Fund
 Cancer Foundation for Life Endowment Fund
 Children's Village Endowment Fund
 The Children's Park Endowment Fund
 Choir School of East Texas Designated Fund
 Camp Tyler Outdoor School Endowment Fund
 Discovery Science Place Endowment Fund
 Edwards Family Endowment for Tyler Family Assistance
 Center at First Baptist Church
 Edgewood Heritage Park Permanent Endowment
 Kevin and Kelly Elftie Scholarship Fund for Texas College
 East Texas Crisis Center, Inc. Endowment Fund
 East Texas Symphony Orchestra Endowment Fund
 John Evans Endowment for the Benefit of the East Texas
 Symphony Orchestra Association
 First Baptist Downtown Missions Ventures Endowment Fund
 Arnold T. Sikes Memorial Endowment for the First Tee of
 Greater Tyler
 Greater Longview United Way Endowment Fund
 Habitat For Humanity Of Smith County, TX Endowment Fund
 Helen Graham Endowment for Hospice of East Texas
 Helen Graham Endowment for Marvin UMC Missions
 Helen Graham Endowment for Tyler Animal Shelter
 Historic Tyler, Inc. Endowment Fund
 Hospice of East Texas Endowment Fund
 Heart of Tyler Endowment Fund
 Ben E. Jarvis Endowment Fund
 Junior League of Tyler Beverly Baird Scholarship
 Endowment
 Kid Reach of MHA/Greater Tyler Endowment Fund
 Lindale ISD Education Foundation Endowment Fund
 Lighthouse for Christ Mission Endowment Fund
 Lindsey Police and Firemen's Endowment Fund
 Literacy Council of Tyler Adult Literacy Endowment Fund
 Longview Faithful Shepherd Foundation
 Meals on Wheels Endowment Fund
 The Mentoring Alliance Endowment Fund
 Barre and Gene Monigold Fund
 Martin Family Fund for the United Way of Tyler/Smith County
 Nacogdoches Area United Way Endowment Fund
 New Creation Foundation Endowment
 Newgate Mission Endowment Fund
 PATH Endowment Fund
 Retail Merchants Association Endowment for PATH
 Riter-Baird Endowment Fund for East Texas Crisis Center
 Jerald B Sanford Gregg County Animal Shelter Endowment
 Tyler/Smith County Juvenile Attention Center Endowment Fund
 Smith County Bar Foundation Endowment Fund
 Mary John Spence Endowment
 Bill R. Sweetmon Educational Endowment Fund
 Mr. & Mrs. Bob Herd Fund
 The Texas Chest Foundation Fund
 Flanagan Nursing Scholarship Fund
 Genecov Memorial Fund
 McCary Heart Endowment Fund
 Life Membership Fund
 Hilman O. McKenzie Fund
 Isadore Roosth Fund
 Whitt Memorial Scholarship Fund
 Tyler Civic Theatre Endowment Fund
 Therapeut Endowment Fund
 Tab and Bonnie Beall Tyler ISD Foundation Endowment
 Braithwaite Tyler ISD Fine Arts Endowment Fund
 Tyler ISD Foundation Carns Scholarship Endowment
 Tyler ISD Foundation Endowment Fund
 Frances Cowan Gibson Tyler ISD Fine Arts Endowment
 Tyler ISD Foundation Maland Scholarship Endowment
 John L. and Mary M. Tracy Endowment Fund for Azleway
 John L. and Mary M. Tracy Endowment For East Texas
 Crisis Center
 John Wingate Trullit Log Cabin Endowment Fund
 Trinity School of Texas Endowments
 Tyler Day Nursery Endowment
 Tyler Rotary Foundation Endowment Fund
 University of Texas at Tyler Foundation Endowment Funds
 United Way of Tyler/Smith County Endowment
 Winsboro Center for the Arts Endowment
 Anna Wegener Memorial Camp Scholarship
 Windridge Therapeutic Equestrian Center of East Texas
 Endowment Fund
 Women's Fund of Smith County Sustaining Fund

Scholarship Funds

Art Excellence Scholarship Fund
 Partners in Arts Scholarship Fund
 Barbara Bass Community College Scholarship Fund
 Brook Hill Founder's Scholarship Fund
 David G. and Jacqueline M. Braithwaite Scholarship in
 Chemistry
 David G. and Jacqueline M. Braithwaite Scholarship in
 Medicine, Biotechnology and Veterinary Medicine
 Jacqueline M. Braithwaite Scholarship Fund for the benefit of
 the TJC School of Nursing
 David G. and Jacqueline M. Braithwaite Vocational-Technical
 Scholarship
 Hugh P. Brown Memorial Scholarship
 Dr. Elbert H. Caldwell Scholarship Fund
 Adam Carroll Scholarship Fund
 Citizens 1st Bank/Perkins Family Foundation State
 Employees' Children's Scholarship Fund
 Donald Scott Cooper Nursing Foundation
 Frances Cowan Gibson Fine Arts Scholarship
 R. Don Cowan Music & Performing Arts Scholarship
 Martha J. Critchfield Women in Finance Scholarship Fund
 Earl Campbell Tyler Rose High School Scholarship
 Helen Elbert Scholarship Fund
 Roy & Betty Erickson Scholarship Fund
 East Texas Estate Planning Council Scholarship
 East Texas Geological Society Scholarship Fund
 Jimmy and Gail Evans Nursing Scholarship
 Jimmy and Gail Evans Teachers Scholarship
 Alex Fleming Infinity Scholarship Fund
 Winifred K. George Scholarship Fund
 Juliette Low's Amazing Girls Scholarship Fund
 Jean and Jim Gully Texas Tech Scholarship
 Carroll and Casey Gurganus Scholarship
 Edna Faulk Haberle Visual Arts Scholarship
 Richard B. and Mary Lou Hamm Scholarship Fund
 Jackson Huse Scholarship Fund
 John Harris Scholarship Fund
 Joey Johnson Memorial Scholarship
 Kathy's Kids Scholarship Fund
 Tim King Memorial Scholarship Fund
 Velma Lemons Scholarship Fund
 Lauren Lewis Memorial Scholarship Fund
 Kenneth Lewis & Robert Miles Memorial JBBA
 Scholarship Fund
 Allen and Nancy Locklin Scholarship Fund
 Christopher Lyon Memorial Scholarship Fund
 Mark W. Allen Memorial Scholarship Fund
 Wayne and Margie Morrison Scholarship
 Sidney Moughon Texas A&M Scholarship
 Sidney Rex Moughon Scholarship Fund
 Frederick Michael Nachman Memorial Scholarship
 Natural Gas Society of East Texas Scholarship Fund
 Gary Neel Memorial Scholarship Endowment
 Rhonda Penny Scholarship Fund
 Kenny Ponder Master Woodcraft Scholarship
 Glenn and Vivian Prater Memorial Scholarship Fund
 Ben and Florine Ramsey Scholarship Fund
 Leslie Reid Memorial Scholarship Fund
 Reilly Foundation Scholarship
 Retail Merchants Association Scholarship Fund
 Robinson Family Memorial Scholarship
 Smith County Baptist Minister Scholarship Fund
 Seeber Tyler ISD Scholarship Fund
 Gladys and Thomas "T.B." Stewart Scholarship Fund
 Gladys and Thomas "T.B." Stewart Texas College
 Scholarship
 The Gerald and Charlie Stoker Memorial Scholarship Fund
 Ben & Bettye Blitz Scholarship Fund
 Joe & Marguerite Davis Scholarship Fund
 T. J. Ivey Scholarship Fund
 Henry & Evelyn Jordan Scholarship Fund
 Tadge & Bill O'Donnell Scholarship Fund
 Tatum Music Scholarship
 Winnie Frank Woolverton Scholarship Fund
 Texas Rose Festival Scholarship Fund
 Tyler Citizens Police Academy Alumni Association
 Scholarship Fund
 Vision for Your Future Scholarship
 Band of Angels Memorial Scholarship
 Whitehouse Young Farmers Scholarship
 Sherilyn A. Willis MD Medical Scholarship Fund
 Randy Willmon Memorial Firefighter Scholarship
 A D and Mary Winston Scholarship Fund

*Some nonprofit endowment funds may permit the beneficiary organization to access principal under certain circumstances. Please call if you have questions prior to making a gift to one of these existing funds. Complete list available online <http://etcf.org/donors/donor-resources/current-list-of-etcf-funds/>

Professional Advisors

At ETCF, we understand the importance of the roles of various professional advisors in a donor's charitable giving. We welcome the opportunity to partner with a regional network of accomplished professionals with expertise in tax law, estate planning, accounting, wealth management and financial planning.

ETCF is the charitable arm of your professional advisory team, supporting you and your clients through every step of the giving process while you retain complete control of your client relationships.

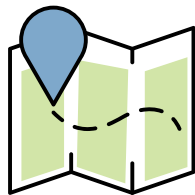
We can help you and your clients:



Identify charitable giving interests and goals.



Match your charitable interests with tax planning needs.



Provide information on community needs and on the agencies and programs that are of greatest interest to your clients.



Create and implement charitable plans integrated with major business, personal, and financial decisions



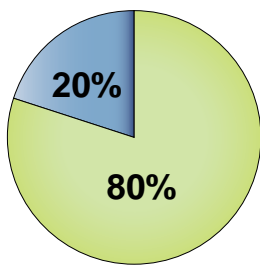
“East Texas Communities Foundation is a powerful resource for me to use in advising clients regarding their financial future. East Texas Communities Foundation is a tool that allows me to communicate with my clients about the universe of charitable possibilities that exists for their family without the undertone of pushing for contributions to a particular cause or charity.”

—Rick Allen, CPA
Henry & Peters, PC

Investments

East Texas Communities Foundation maintains three investment strategies to meet the unique investment and distribution requirements of various donors and charities. The Foundation’s goal is to enable our donors to achieve both their philanthropic and financial objectives.

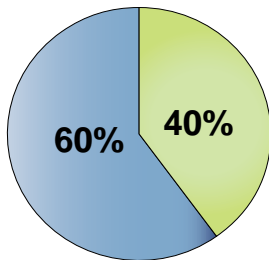
In order to meet the investment objectives of various charitable funds, donors can recommend one of six professionally-managed investment portfolios. Donors may select an actively-managed investment portfolio or a portfolio of passive index funds following one of three investment strategies as described below.



Objective: preservation of capital and maintenance of purchasing power
conservative

80% Fixed Income
20% Equities

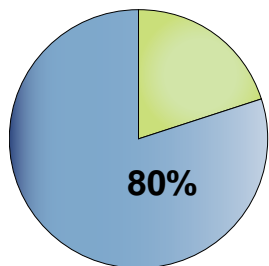
Recommended for funds which are expected to distribute income and principal in the short-term. Any distributions made from funds invested in the conservative portfolio will likely include “principal” distributions.



Objective: maintain purchasing power and provide growth of capital and income
moderate

40% Fixed Income
60% Equities

Long-term funds such as nonprofit endowment funds and scholarship funds are typically invested in the Moderate Portfolio to meet annual distribution requirements and grow for the future.



Objective: capital appreciation
growth

20% Fixed Income
80% Equities

Recommended for endowed or non-endowed funds which desire a higher potential spending rate and are willing to endure a higher level of volatility.



Our investment committee, made up of community leaders, works with a team of professional investment advisors to guide the investment strategy of the Foundation. Committee members are:

- Alan Roseman, CPA, Roseman Wealth Advisors, *Investment Chair*
- Douglas G. Bolles, Executive Vice President, WealthPointe Financial Planners
- James Richard Allen, CPA, Shareholder, Henry and Peters, P.C.,
- Garnett Brookshire, President, Peoples Petroleum
- Steve Roosth, President, Roosth Production Company
- Scott Terry, Retired Investment Advisor
- A.W. “Whit” Riter, III, President, Riter Management Co., L.C., *Advisory Member*

Interested in recommending your investment advisor?

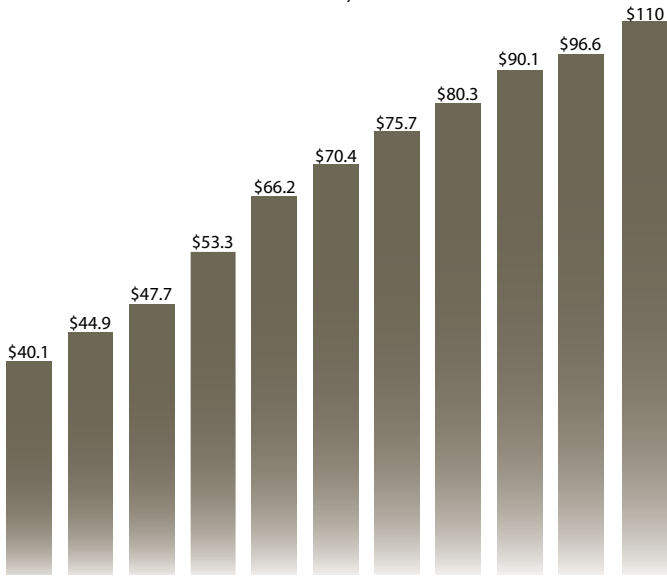
Donors creating funds with balances of \$500,000 or greater, may recommend the funds be invested with an outside manager. ETCF’s Investment Committee works with outside investment advisors to help donors reach their charitable goals.

FINANCIAL HIGHLIGHTS

Year Ending December 31, 2019

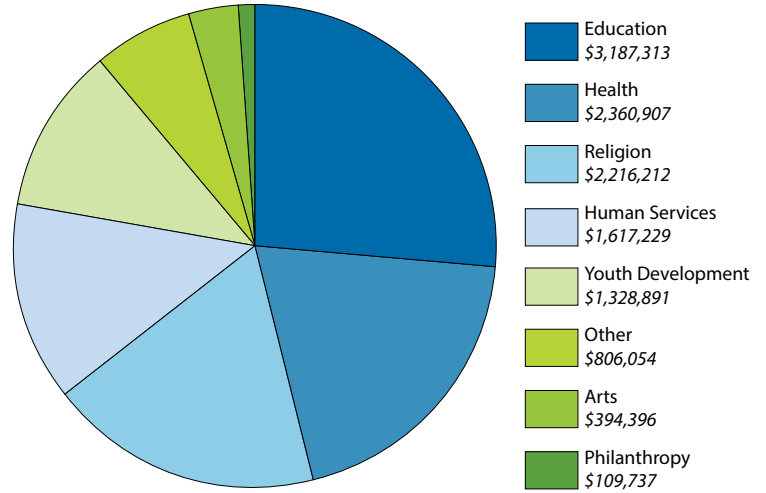
ASSETS

2009 - 2019, in millions



GRANTS

Total Grants \$12,020,741



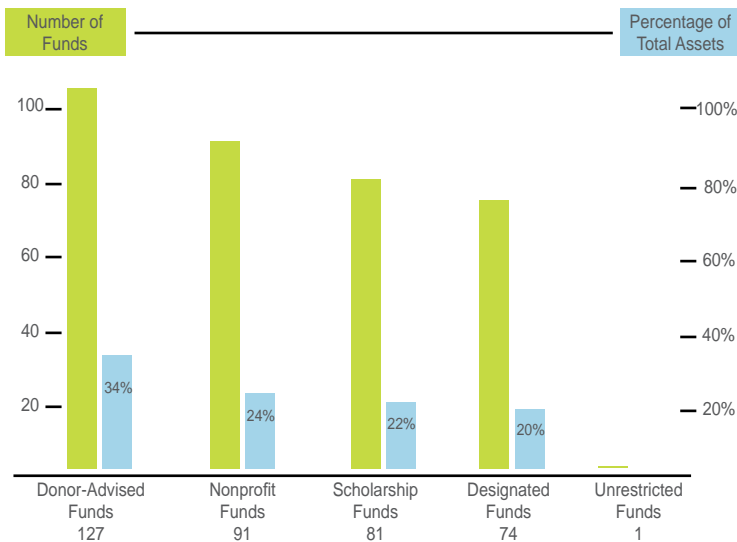
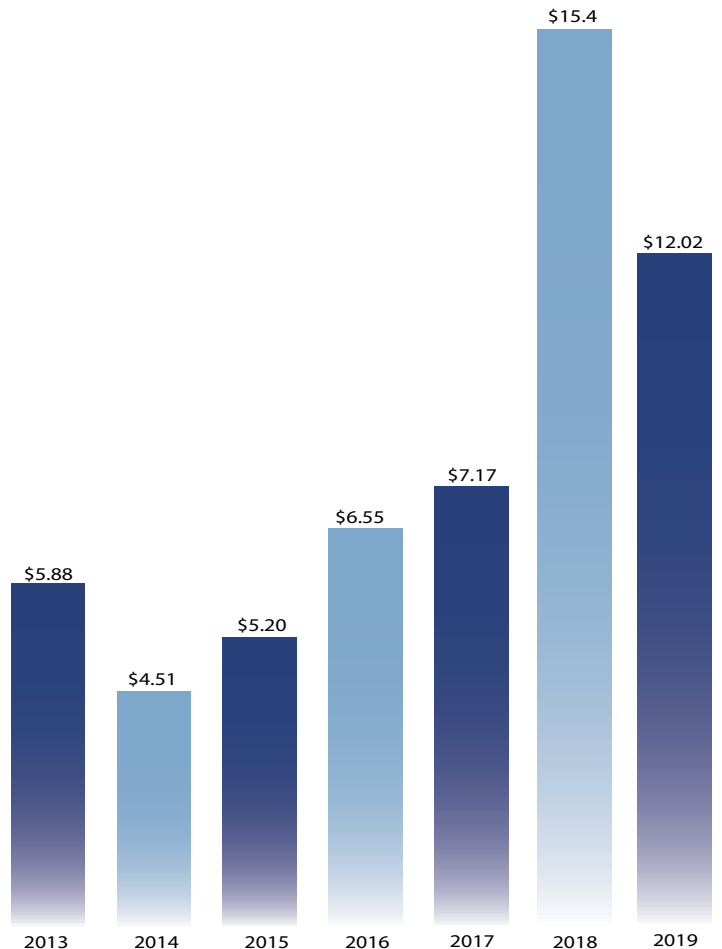
2019 Number of Funds by Type

Donor-Advised Funds	127
Nonprofit Funds	91
Scholarships	81
Designated Funds	74
Unrestricted	1

2019 total funds: 374

GRANTS BY YEAR

2013 - 2019, in millions



2020 ETCF EXECUTIVE COMMITTEE & BOARD OF DIRECTORS



Tony Morgan

Founding Partner
Gollob Morgan Peddy P.C.
Board Chair



Tiffany Kirgan

Financial Advisor/Partner
Johnson Financial Group
Vice Chair/Governance Chair



Michael Bosworth

President
Bosworth & Associates
Treasurer/ Audit Chair



Shannon Glenney

Community Volunteer
**Secretary/
Marketing/Development Chair**



Alan Roseman

Owner/Advisor
Roseman Wealth Advisors
Investment Chair



Barbara Bass

Benefits/Fundraising
Auctioneer
Grants Chair



Dawn Franks

President
Your Philanthropy
Policy Chair



Doug Bolles

Partner, WorthPointe
Wealth Management
Immediate Past Board Chair

2020 Board of Directors

Marilyn Abegg Glass
Chairman of the Board
Abegg & Associates

Craig Adams
Attorney
Adams & Coker, P.C.

Rick Allen
CPA/Shareholder
Henry & Peters, P.C.

Robert Bailes
CPA, Founder
Bailes & Company, P.C.

Peter Boyd
Senior Executive Vice President
Southside Bank

Garnett Brookshire
President
Peoples Petroleum

Dirk Coleman
CPA, AEP, Vice President
Curtis Blakely & Co., P.C.

Jay Ferguson
Headmaster
Grace Community School

Kimberly Fish
Freelance Writer &
Community Volunteer

Lee Gearheart
Partner
Gearheart + Gearheart, PLLC

Judith K. Guthrie
Retired Federal Magistrate Judge,
United States District Court for the
Eastern District of Texas

Mark Hagan
Senior Vice President-Wealth
Management, CFP/CAP
KNH Wealth Management Group

Edwin Holt
CEO
Holt Creative Group

John Jones
Chief Executive Officer
Jones Legacy Ventures

Gregory T. Kimmel
Attorney, Partner
Allen, Lottman, Kimmel P.C.

Dale Lunsford
President
LeTourneau University

Gordon Northcutt
Vice President & Trust Officer
Vera Bank

Richard Perryman
Retired Investment Advisor

Steve Roosth
President
Roosth Production Company

Kristen Seeber
President & CEO
Women's Fund of Smith County

Scott Terry
Retired Investment Advisor

Advisory Board

A.W. "Whit" Riter, III
President
Riter Management Co., L.C.

W. Fred Smith, Jr.
Founder of
The Gathering

Emeritus Board

Allen Burt
Allen M. Burt Financial Services

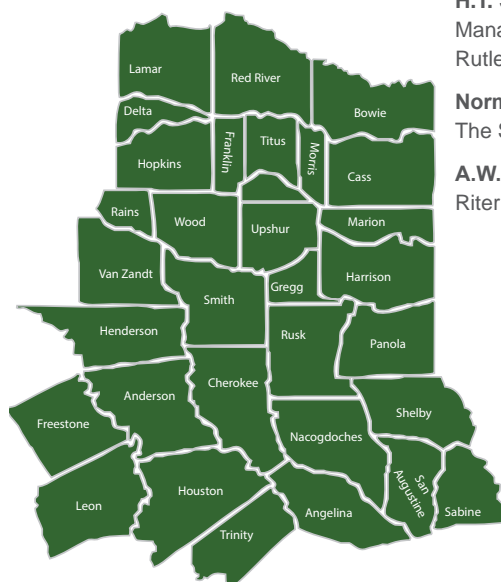
F. William Martin
Retired Civic Leader

H.T. Smith
Managing Partner
Rutledge Capital

Norman Shtofman*
The Shtofman Company

A.W. "Dub" Riter, Jr.*
Riter Management Co., L.C.

*Deceased



**ETCF serves
32 counties in
East Texas.**



315 N Broadway, Suite 210 Tyler, Texas 75702

903-533-0208 Toll Free 1-866-533-ETCF (3823) FAX 903-533-0258

www.etcf.org

*Philanthropy builds community and changes lives.
East Texas Communities Foundation supports philanthropy by
offering simple ways for donors to achieve their charitable goals.*