

Simplified Charitable Giving



ETCF Sees Marked Fund Growth at Year-End

ETCF received more than \$10.8 million in contributions for 2019, which marks the third highest level of annual contributions in our 30 year history. ETCF ended the year with \$110 million in charitable assets under management.

“In 2019, we added 13 new funds, ending the year with 374 unique charitable funds,” said Kyle

Penney, ETCF President. “The increase reflects the priority of donors, working with area financial advisors, to make significant investments in philanthropy.”

2019 also marked a significant grant-making year with the Foundation awarding \$12 million to charities.

ETCF Recognized at AFP’s East Texas Philanthropy Day

ETCF staff, board members and honored guests celebrated National Philanthropy Day in November at Willow Brook Country Club. The event is hosted locally by the East Texas Chapter of the Association of Fundraising Professionals. Honorees for 2019 included Dr. D.M. Edwards, Outstanding Philanthropist; Austin Bank, Outstanding Philanthropic Corporation; East Texas Communities Foundation, Outstanding Philanthropic Foundation; and Dawn Franks, Special Recognition.



Kyle Penney celebrates Philanthropy Day with those instrumental in the creation of ETCF. Pictured left to right: Kyle Penney, Bill Martin, Allen Burt, Arlene Burt and Barbara Shoftman.



Tony Morgan, Board Chairman for ETCF, accepts the award of Outstanding Philanthropic Foundation on Philanthropy Day. Pictured left to right: Dennis Cullinane, AFP Past President, Tony Morgan and Whitney Patterson, AFP President.

ETCF Adds New Board Members for 2020

East Texas Communities Foundation welcomes five new board members: John Jones, Dirk Coleman, Richard Perryman, Lee Gearheart and Judith Guthrie.



John Jones is the Chief Executive Officer of Jones Legacy Ventures. Mr. Jones grew up in Carthage, Texas, and earned a BS in Construction Science from Texas A&M. In 1987, Mr. Jones and his siblings purchased Cassity Jones Lumber Company from their father. Mr. Jones and his wife Lisa currently reside in Flint, Texas, and are involved in numerous community projects.

Dirk Coleman is a CPA at Curtis Blakely and Company based in Longview, Texas. Mr. Coleman graduated with a BS in Accounting from Oral Roberts University and a Masters of Accounting from Texas A&M.



Lee Gearheart was a founding partner of Gearheart and Gearheart, CPAs in Henderson, Texas. Mr. Gearheart has worked in the accounting field for over 30 years. Mr. Gearheart



graduated from Ball University and has served on numerous nonprofit boards in Rusk County.

The Honorable Judith Guthrie served for 27 years as a federal magistrate judge in the Eastern District of Texas. After receiving her law degree from the University of Houston, Judge Guthrie worked in private practice before accepting a judicial appointment in 1986. Since retiring in 2013, Judge Guthrie continues to serve the community through her involvement with various nonprofits.



Richard Perryman is a CPA originally from Mount Pleasant, Texas. Mr. Perryman served as a Trust Officer for Guaranty Bank for 17 years. A graduate of the University of Texas at Austin, Mr. Perryman received a BBA in accounting. In 2010, Mr. Perryman opened a financial planning practice in Tyler.

ETCF to Host Fifth Annual Regional Day of Giving in East Texas

East Texas Communities Foundation officially launched *East Texas Giving Day 2020* by hosting a best practices and kick off seminar at the East Texas Food Bank Volunteer Center in early January. Over one hundred regional nonprofit leaders attended the training.



Bowie County nonprofits participated in a regional East Texas Giving Day kick off party held in Texarkana, Texas, in January. ETCF held similar events in communities across the 32-county service area.

Entering into its fifth year, East Texas Giving Day is an 18-hour, online giving event which will take place on Tuesday, April 28, 2020.

Benefiting nonprofits across the 32 counties served by ETCF, East Texas Giving Day has raised over \$3.1 million since its inception in 2016.

ETCF provides training to participating nonprofits to equip them with the skills needed to have a successful campaign. This year, trainings will be provided by webinar, allowing participants from the entire service area to take part.

"Nonprofits from Texarkana to Lufkin are participating in Giving Day," said Kyle Penney, ETCF President. "We understand that our region is vast and our nonprofit leaders have busy schedules. Since we don't want anyone to miss out, our core trainings will be presented through webinars."

Each session will be recorded and available online at www.EastTexasGivingDay.org for nonprofits to review at anytime.

If you know of or are a part of an organization that would like to participate in East Texas Giving Day, you can find more information online at <https://www.easttexasgivingday.org> or by calling our office at 866-533-3823. Nonprofit registration ends March 24, 2020 at 5 p.m.



ETCF would like to recognize Mrs. Frances Swann for making the first contribution of 2020. Mrs. Swann has been a fund holder at ETCF for more than 15 years. Pictured left to right: Mrs. Swann and Beth Filla, Donor Relations Specialist.

ETCF Staff Grows with Addition of Second Program Officer

Dana Durman returns to the staff of ETCF as Program Officer. Dana will assist with the administration of scholarships at ETCF as well as processing grant recommendations. Dana can be reached at ddurman@etcf.org.

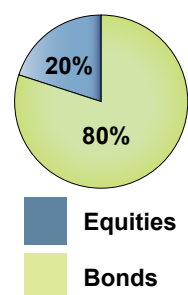


A series of webinars will be offered to 2020 Giving Day participants:

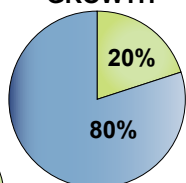
- Social Media Basics Webinar*..... Tuesday, February 25th 11:00 a.m. – 12:00 p.m.
- Social Media Advanced Webinar* Tuesday, March 17th 11:00 a.m. – 12:00 p.m.
- Implementing Your Message Webinar* Tuesday, March 24th 11:00 a.m. – 12:00 p.m.
- Prizes! Webinar on Strategy*.....Wednesday, April 1st 11:00 a.m.

Nonprofits can register for these trainings by going to <http://etcf.org/giving-day/giving-day-events/>

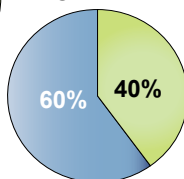
CONSERVATIVE



GROWTH



MODERATE



INVESTMENT RETURNS- As of December 31, 2019

PORTFOLIO	Year-To-Date	3 Year	5 Years	Since Inception
Conservative	12.20%	6.50%	4.80%	5.25% (02/03)
Moderate	18.00%	9.10%	6.90%	6.35% (02/03)
Moderate-ETF	20.10%	9.30%	6.40%	8.54% (09/11)
Growth	21.90%	10.20%	7.30%	7.80% (02/03)
Growth-ETF	23.90%	11.30%	NA	11.01% (03/16)

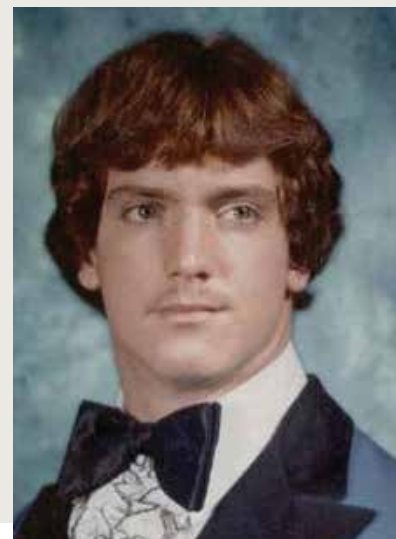
Additional information available at www.etcf.org. Returns shown are net of fees paid to money managers.

Scholarship Created to Honor Life of Kilgore Man

Through the generosity of family and friends, the Joey Johnson Memorial Scholarship was created to honor the memory of a young man tragically taken too soon. On the evening of September 23, 1983, just before closing time, armed robbers held up the Kentucky Fried Chicken restaurant in Kilgore, Texas. Joey and four other victims were abducted and senselessly murdered.

Joey was a hardworking young man with big dreams. At the time of his death, Joey was working two jobs and attending Kilgore Junior College. To honor his memory, this scholarship fund was established to help others with the same drive to achieve their dreams by providing educational assistance to students from Gladewater, Sabine, West Rusk and Overton high schools in East Texas.

If you would like to discuss creating a scholarship at ETCF, please call 903-533-0208 to set up an appointment.



GRANTS

MAKING AN IMPACT +

Take a look at what is happening around East Texas. The pictures below represent just a few of the ways fundholders are investing in our communities through ETCF.

Education: Kilgore ISD Education Foundation hosted 'A Night Under the Stars' at the Texan Theater in early 2020. Funds granted to Kilgore ISD Foundation provide support for educational activities at Kilgore ISD which benefit students and personnel by supporting activities not funded by tax dollars.



1.



2.

Arts & Culture: Former President George W. Bush was the inaugural speaker for the East Texas Speakers Forum at LeTourneau University's Belcher Center in Longview, Texas. The regional nonprofit speaker series plans to host two more events over the next year in the communities of Mount Pleasant and Marshall, Texas.



3.

Youth Development: Glory Gang Ministries works with children throughout Nacogdoches County, providing them with food, fellowship, and fun. Glory Gang's mission is to encourage children to face life's challenges with grace and love and to empower them with tools that can help overcome challenges. On average, 400 at-risk children are served each week.



5.



4.

Health: The Roy and Betty Erickson Charitable Fund for Nursing held at ETCF awarded a grant to Texarkana College Department of Nursing to purchase simulation lab equipment and hospital beds for classroom and lab use. The equipment will provide students with a more realistic training experience without fear of harming a patient.

Community Improvement: October is National Fire Prevention and Safety Month. A grant was made to the City of Rusk to support the Rusk Municipal/Volunteer Fire Department, one of the oldest emergency response groups serving Cherokee County since 1914.

SAVE THE DATE!
Advanced Giving Starts
April 13, 2020

ETCF
EAST TEXAS COMMUNITIES FOUNDATION
315 N. Broadway, Suite 210
Tyler, Texas 75702
www.etcf.org

**EAST TEXAS
GIVING DAY**



facebook.com/SimplifiedGiving

Want to learn more about Giving Day?
Go online to
www.easttexasgivingday.org.

For more information about ETCF, please contact us
at 866-533-3823 or info@etcf.org

Join us for the 13th annual
PROFESSIONAL ADVISOR EDUCATION SERIES

The SECURE Act and Its Impact on Planning Strategies

Tuesday, May 5, 2020

7:30 a.m. to 9:00 a.m.

at Hollytree Country Club
6700 Hollytree Drive • Tyler, Texas

The SECURE Act, which passed into law in late 2019, includes many provisions designed to facilitate and enhance retirement savings.

ETCF will take you through the most important provisions of the Act and share a few of the financial and estate planning philosophies emerging from the changes in the SECURE Act. A complementary breakfast buffet will be provided.

Seating is limited.
Please RSVP to 903-533-0208 or RSVP@etcf.org

1 hour continuing education for CLE, CFP, CPE.

