The Power of Community.

Thank you for taking a few moments to consider the role of philanthropy in The Power of Community. At East Texas Communities Foundation (ETCF), we believe philanthropy builds community and changes lives. Our goal at ETCF is to facilitate the generosity of citizens who provide the power to make our communities better and stronger year after year.

East Texas is full of amazing charitable organizations that provide needed services and enrich our lives in countless ways. This annual report presents a number of examples of how and where charitable resources are being deployed in our communities through various charitable funds at the foundation. It is our pleasure to help donors and nonprofit organizations reach their charitable goals with the assistance of grants from over 360 charitable funds.

Following strong investment returns in the prior year, 2018 was a year that ended on a market downturn. Despite the setback, grants from funds at the foundation during 2018 reached another all-time high. Our fund holders made grants of more than $15 million to nonprofits located in East Texas and across the United States. This represents a 115% increase over 2017. The generosity of our friends and neighbors is the reason for such an increase in charitable grants. That’s what makes East Texas a great place to live and work.

As we have stated in previous reports, the board of directors and staff of ETCF are committed to serving our entire 32-county region of East Texas. This report highlights how philanthropy has been used to strengthen a wide range of nonprofits in communities across our region. Our staff welcomes the opportunity to assist donors as they provide the power to make their community a better place to live, grow and thrive.

We look forward to working with you to help you reach your charitable goals!

Kyle L. Penney
President,
East Texas Communities Foundation

Tony Morgan
Board Chairman,
East Texas Communities Foundation

ETCF President, Kyle Penney, visited with members of Congress during Foundations on the Hill to discuss critical issues affecting the charitable sector. Pictured left to right: Kyle Penney, U.S. Congressman Louie Gohmert (TX-01), Juliana Penney and Felicia Goodman, Executive Director of the Cooper Foundation.

STAFF

Kyle Penney, President/CEO ................................. kpenney@etcf.org
Mary Lynn Smith, Program Officer .......................... msmith@etcf.org
Beth Filla, Donor Relations ................................... bfilla@etcf.org
Holly McFarlin, Director of Public Relations ............. hmcfarlin@etcf.org
Lindsay Sneed, Director of Finance & Administration .... lsneed@etcf.org
Lisa McIntyre, Assistant to the President ..................... lm McIntyre@etcf.org

To speak directly with one of our staff please call
866-533-3823 or 903-533-0208
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2018 Financial Summary
Total Assets 12/31/17............ $90,071,812
2018 Contributions ................. $12,165,226
2018 Transfer from Support Foundation .... $14,475,678
2018 Grants ......................... ($15,432,611)
Net Investment Activity ........ $-4,105,182
Net Operating Expenses ........ ($754,310)
Total Assets 12/31/18........... $96,420,613

Education: McKenzie Castro, a graduate of Gilmer High School, received the Braithwaite Scholarship in Medicine, Veterinary Medicine and Biotechnology in 2018. This scholarship was established by Mrs. Jacqueline Braithwaite in honor of her husband’s many accomplishments as a chemist.

Human Services: A grant to Tejas Missions, based in Tyler, Texas, facilitates medical and dental mission teams that travel to remote villages in the rain forests of Belize and Guatemala. Grants were made to support an upcoming medical mission trip to Belize.

Religion: Cross Brand Cowboy Church received a grant to continue their arena ministry program. Cross Brand Cowboy Church is located along Pine Springs Road in northern Smith County. Cowboy churches share the gospel of Jesus Christ while embracing a culture of western heritage.

Human Services: ETCF President Kyle Penney presented a check from the annual Shine Your Light Campaign in the amount of $15,479 to staff and supporters of Hiway 80 Rescue Mission, Gateway to Hope, a day resource center for those in need in Tyler. Pictured left to right: Dr. Sasha Vukelja, Don Warren, Kyle Penney, Holly McFarlin and Dawn Moltzan.
The power of COMMUNITY starts with generous PEOPLE.

The power of philanthropy in our East Texas communities is vast and far-reaching. For thirty years, the people of East Texas have entrusted East Texas Communities Foundation with their philanthropic goals and wishes. Our generous donors have embraced this power of giving, helping create places and communities where people can thrive.

East Texas Communities Foundation can help you and your professional advisor devise a customized philanthropic plan to achieve your charitable goals. Individuals, families, businesses, and organizations create charitable funds that help their region meet the challenges of changing times.

Donors and nonprofits are doing good in our communities and we value their partnership and the power of community.

In 2018, East Texas Communities Foundation awarded a record $15.4 million in grants and scholarships. This amount is up 115% from 2017!

In addition, individuals, families, businesses and organizations contributed over $12 million to ETCF to establish new charitable funds or supplement existing funds.

92 students were awarded scholarships for the 2018-19 academic year.
Recipients were selected from 1,900 applicants for 52 different scholarships available at ETCF.

Palestine-based foundation partners with ETCF to increase area philanthropy

East Texas Communities Foundation (ETCF) and the Texas Area Fund Foundation (TAFF) joined forces in 2018. The merger offers full time administrative staff support and increased fund investment options for TAFF fund holders who originally established their funds with the Palestine based foundation.

Hugh and Ahnise Summers along with Kyle Penney, ETCF President, celebrate the partnership of the Texas Area Fund Foundation joining ETCF.
The Power of Community.
Smith • Henderson • Cherokee • Anderson
Freestone • Leon • Houston • Trinity

Arts & Culture: The East Texas Youth Orchestra received funding from the Gladys and Thomas “T.B.” Stewart Community Education Fund. The grant helped with the cost of professional musicians to coach students and allow technical training in an orchestra setting.

Youth Development: A grant from the Bill R. Swetmon Educational Endowment Fund went to Buffalo Independent School District for classroom projects and professional development of staff. Buffalo ISD is located in northern Leon County and extends into southern Freestone County.

Education: Julie Wiggins a graduate of Lapoyner High School, received the Velma Lemons Future Teacher Scholarship in 2018. Pictured with Julie are Marc and Bart Lemons sons of the late Mrs. Lemons.

Human Services: Best-selling Christian author Bob Goff was the keynote speaker at the annual PATH Week Celebration Luncheon held in the Fall of 2018. ETCF fund holders made grants to the PATH luncheon which is an annual fundraising event designed to highlight PATH’s programs and services. Pictured: Bob Goff and Gregg Grub.

Volunteers from the Children’s Advocacy Center of Anderson and Cherokee Counties took time out for a group photo at Chief Hawkes’ Scramble Against Abuse Inaugural golf tournament. The tournament took place at Cherokee Ranch Golf Club in Jacksonville, Texas and raised funds to support victims of domestic violence and child abuse.
Arts & Culture: The Winnsboro Center for the Arts was awarded a grant to support their children’s summer music camp from the Mrs. A.D. Francis Endowment Fund. The purpose of the A.D. Francis Endowment is to support and build the capacity of charities serving the people of Winnsboro, Texas.

Education: Levi Hawkins, a graduate of Grand Saline High School, received the Adam Carroll Scholarship in 2018. This scholarship was established in 2002 by friends and family of Adam Carroll and is awarded to students from Grand Saline High School who participated in athletics or cheerleading.

Human Services: The Winnsboro Community Resource Center received a grant to fund food purchases. The organization ministered to over 6,000 people in 2017, providing food, clothing, and emergency assistance.

The Paris Lamar County Habitat for Humanity received an East Texas Giving Day ‘Early Bird Registration’ prize from ETCF. On the front row, left to right are Sue Smith, board member, Executive Director Judy Martin and board member Brady Fisher. Back row left to right, board president Cindy Ringwald, board vice president Rona Vickers, A Brush With Kindness co-chair Ed Farmer, and construction chair Marc Whitney.
**Education:** Ashlynn Eubanks, a graduate of Chapel Hill High School, Mount Pleasant, Texas received the Peace Officers and Firefighters Scholarship in 2018. This scholarship was established by the board of Directors of ETCF to honor the public service of dedicated peace officers and firefighters.

**Education:** Northeast Texas Community College received a grant from the Burt and Nancy Marans Charitable Fund to provide scholarships to non-traditional students. Burt Marans was committed to supporting students obtain a college degree.

**Arts & Culture:** The Mount Vernon Music Association received a grant from the Evans-Merrick Music Grants fund held at East Texas Communities Foundation, in support of their summer musical program. Children from Franklin County enjoyed the musical rendition of “Beagles’ Day Out” by Benedikt Brydern.

**Education:** Friends of the Naples Texas Public Library received a grant to provide a Summer Reading Program. The grant also purchased a collection of new children’s books for the library.

Texarkana nonprofits collaborated to design an effective marketing plan for East Texas Giving Day in Bowie county. Pictured left to right are Ashley Lockett, Harvest Regional Food Bank; Laney Bassham, Texarkana Regional Arts and Humanities Council, Inc.; Tiffani Whitehead, Texarkana Regional Arts and Humanities Council, Inc; Katherine Morgan, Habitat for Humanity Texarkana; Brian Goesl Texarkana Regional Arts and Humanities Council, Inc; Mary Wormington, Habitat for Humanity Texarkana.
The Power of Community.

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

**Human Services:** Windridge Therapeutic Equestrian Center of East Texas received a grant to provide equine therapy for children and adults with disabilities.

**Education:** A grant was made to The Jefferson Carnegie Library in Jefferson, Texas to update computers and printers. The library was originally built in 1907 with funding from philanthropist Andrew Carnegie.

**Youth Development:** Gregg County fund holders supported the Longview Lobo Tennis Booster Club by recommending a grant to assist with the cost of resurfacing the school’s tennis courts.

**Education:** Red River Radio Network, a community-supported service of LSU-Shreveport and non-commercial source for NPR News, classical music, jazz, blues, and more, received a grant to support the purchase of a new antenna. The stations serving East Texas operate as KLDN 88.9FM in Lufkin and KTYK 100.7FM in Overton.

ETCF is proud to work with fund holders to support the development of the Longview Arboretum and Nature Center. Scheduled to open in 2019, the center will provide a multi-use arboretum and green space near downtown Longview. Developed through a public/private partnership with the City, the Longview Arboretum will celebrate native trees and plants and feature cultivated forests, meadows, gardens, waterways, and trails.

**Education:** Marin Beal, a Nacogdoches High School graduate, received the Citizen’s 1st Bank Perkins Family Foundation State Employees’ Children’s Scholarship in 2018. The scholarship was established through the generosity of Citizens 1st Bank and the Perkins Family Foundation in appreciation of the dedication of State of Texas employees.
ETCF Launches First Regional Advisory Council in Gregg County

East Texas Communities Foundation (ETCF) welcomed ten of Gregg County’s community leaders as the inaugural members of the Gregg County Advisory Council.

“While we have long had Gregg County representatives on our board of directors, we are excited to have a dedicated group to bring an increased focus to the needs and issues of Longview and surrounding communities. The creation of the Gregg County Regional Advisory Council demonstrates our commitment to serving the needs of our entire region,” said Kyle Penney, ETCF President. “Each community in East Texas has strengths and challenges. Engaging a local advisory council will help ETCF, as an organization, understand and appropriately address the philanthropic landscape found throughout our region.”

The creation of regional advisory councils is a direct outcome of ETCF’s strategic planning process which focuses on meeting the diverse philanthropic needs of the 32-county service area.

Advisory council members will meet two times a year to discuss important issues in their community and advise Foundation staff on local issues. Council members will be selected based on their interest in philanthropy. Participation on the council will provide members with opportunities to actively promote philanthropy as well.

Gregg County Advisory Committee members include:

- Bruce Cammack – RBC Wealth Management
- Dirk Coleman – Curtis Blakely & Co., P.C.
- Jeff Moore – Henry & Peters, P.C.
- Josh Black – U.S. Title Company, Inc.
- Karen Partee – Texas Bank & Trust
- Kristen Ishihara – Ross & Shoalmire L.L.P.
- Linda Thomas – community leader
- Mark Boon – Boon Calk Echols Coleman & Goolsby PLLC
- Mike Starr – Coghlan Crowson L.L.P.
- Richard Manley – community leader

The Gregg County Advisory Council is a great opportunity for the community to learn how their philanthropic activities can best serve local needs. The council gives us a chance to work with donors and nonprofits serving our area, and at the same time use ETCF as a conduit to help expand charitable activities in Gregg County and beyond.

Jeff Moore, Henry & Peters, P.C. Longview, Texas
Throughout the country, “giving days” have proven to be exciting and fun fundraising campaigns for nonprofits and donors alike. East Texas Giving Day is no exception!

In its third year, East Texas Giving Day is changing the face of philanthropy throughout the region. In only 18 hours on April 24, 2018, nonprofits raised more than $750,000 mainly through online and social media efforts.

While ETCF is proud to be the engine behind East Texas Giving Day, we are even more proud of the incredible work and effort of the participating nonprofits that make the day so successful.

<table>
<thead>
<tr>
<th>Percentage of Donors</th>
<th>23%</th>
</tr>
</thead>
<tbody>
<tr>
<td>that Covered the Fees</td>
<td>84%</td>
</tr>
</tbody>
</table>

$754,742 raised in 18 hours from 2,475 Gifts

$272,700 Total Matching Funds Raised by Nonprofits

2018
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, etc., 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 related 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 several named 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 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.
As a fellow nonprofit, East Texas Communities Foundation is keenly aware of the funding challenges facing charitable organizations. ETCF can assist nonprofits in two significant ways. First, in its role as grant maker, ETCF has distributed millions of dollars to nonprofits. Second, ETCF assists the nonprofit sector through careful stewardship of endowments for charitable agencies. If you are a staff member, board member, friend, volunteer, or advisor of a nonprofit organization, you may find that placing an endowment with East Texas Communities Foundation is a cost-effective and practical way to manage and build permanent support for your organization.

**ENDOWMENT**

**Building For The Future—Now.**

**1. Create the Endowment:** Endowments are an attractive option to donors, particularly those who wish to make large gifts or leave a gift by bequest, since their donation is invested in perpetuity and only income is expended for annual operating costs. Even a small endowment is a seed to which your organization and supporters can grow over time.

**2. Build the Endowment:** East Texas Communities Foundation’s endowments are managed by professional investment managers chosen by its Investment Committee for their expertise. Because the funds are pooled for investment purposes, agency endowments at ETCF obtain lower fees, greater diversification of investments to protect against market fluctuations, and more efficient investment service than endowments that are invested separately. ETCF is able to handle gifts of publicly traded and closely-held securities, real estate, life insurance, and more, while providing the expertise needed to receive these types of gifts into your agency endowment.

**3. Partners for Future Growth:** East Texas Communities Foundation advocates endowment building because this source of permanent capital helps organizations plan for a stable and secure future. Almost 100 nonprofit organizations are already building endowments with us. Nonprofit Endowment funds provide organizations with a reliable, ongoing source of financial support and offer a meaningful opportunity for donors to leave a legacy for your organization.
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.

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 continue managing funds.

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.

<table>
<thead>
<tr>
<th>Gifts-Options and Considerations</th>
<th>Direct Gift to Charity</th>
<th>Private Foundations</th>
<th>East Texas Communities Foundation</th>
<th>Supporting Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Amount Deductible</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publicly Traded Securities</td>
<td>FMV*</td>
<td>FMV*</td>
<td>FMV*</td>
<td>FMV*</td>
</tr>
<tr>
<td>Other Appreciated Property</td>
<td>FMV*</td>
<td>Limited to Cost Basis</td>
<td>FMV*</td>
<td>FMV*</td>
</tr>
<tr>
<td><strong>Percentage Limitations</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash Gifts</td>
<td>60% of AGI**</td>
<td>30% of AGI**</td>
<td>60% of AGI**</td>
<td>60% of AGI**</td>
</tr>
<tr>
<td>Appreciated Property</td>
<td>30% of AGI**</td>
<td>20% of AGI**</td>
<td>30% of AGI**</td>
<td>30% of AGI**</td>
</tr>
<tr>
<td><strong>Other Considerations</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Excise Tax on Investment Income</td>
<td>No Investment Income</td>
<td>1% – 2%</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Excess Business Holding Limitations</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Donor Control</td>
<td>Full</td>
<td>Legal</td>
<td>Advisory</td>
<td>Donor can be minority board member</td>
</tr>
<tr>
<td>Anonymity</td>
<td>Yes</td>
<td>No. Must file detailed returns on grants, investments, fees, salaries, etc.</td>
<td>Yes. Donors and grants can be private. Foundation can serve as a buffer between donor and grant-seekers</td>
<td>Limited</td>
</tr>
<tr>
<td>Distribution Requirement</td>
<td>No</td>
<td>Yes~ 5% annually</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Incorporation, Tax Exemption, Audit/ Tax Returns, Directors/ Officers Insurance, Grants Management, Compliance</td>
<td>Not Applicable</td>
<td>Responsible for all functions; foundations less than $3 million have average expenses ranging from 3-5%, decreasing as the assets grow larger</td>
<td>ETCF handles all administration and investment management with a tiered fee ranging from 1.31-2.25%, decreasing as the assets grow larger</td>
<td>Attached to Communities Foundation yet remains independent– fees are generally between private foundations and communities foundations</td>
</tr>
<tr>
<td>Primary Disadvantages</td>
<td>Timing – Gift must be made in same year as income to maximize tax benefits</td>
<td>Compliance, tax reporting, annual payout requirements, tax on investment income, contribution restrictions.</td>
<td>Advisory vs. Ownership control</td>
<td>Minority control, does not eliminate separate accounting and tax reporting</td>
</tr>
<tr>
<td>Primary Advantages</td>
<td>Control, family identity</td>
<td>Control, independence, family identity, administrative compensation permitted</td>
<td>Deductibility, nonprofit knowledge, flexibility, permanence, tax-free growth and no administration</td>
<td>Deductibility, separate board, family identity, more apparent control</td>
</tr>
</tbody>
</table>

*Fair Market Value  **Adjusted Gross income
Grants from funds held at ETCF are directed to a variety of charitable purposes. If you are seeking a meaningfully wide range of opportunity 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 Fund
- Adams Family Donor-Advised Fund
- Against Aging Fund
- Sidney and Anna Lee Allen Charitable Fund
- Allison Family Donor-Advised Fund
- Anderson-Vukelja Donor-Advised Fund
- Jeff and Sissy Austin Donor-Advised Fund
- Bagley Family Charitable Fund
- Glenda Barrett Charitable Fund
- Barbara and Billy Bass Charitable Fund
- Beryl Berry Donor Advised Fund
- Carol and Evelyn Boehm Donor-Advised Fund
- Thomas W. Boehm, MD Donor-Advised Fund
- Marilyn Joan Brinkman Donor-Advised Fund
- Brad and Ann Brookshire Donor-Advised Fund
- Tim and Michelle Bronkholm Family Fund
- Brown Family Donor-Advised Fund
- Frank J. Budde and Marilyn Budde HPP Fund
- Joyce Buford Donor-Advised Fund
- Bullock Rotary Charitable Fund (Bullard Kids’ Park)
- Butt Family Fund
- Shirley and Don Chase Donor-Advised Fund
- Cordell Family Donor-Advised Fund
- Betty Danielson Memorial Fund for Youth
- Suzanne Hunter Davis Donor-Advised Fund
- Donnel Fund
- Dent Charitable Fund
- John and Dandi Devine Charitable Fund
- Kathleen Draper Donor-Advised Fund
- Evans-Merrick Music Grants Fund
- Robert and Beth Faulkner Donor-Advised Fund
- Larry and Dana Fleming Charitable Fund
- Gertrude Windsor Garden Club Fund
- Gerald Family Donor-Advised Fund
- Emily and Gerald Gibson Fund
- Greater Longview United Way Donor-Advised Fund
- Dr. and Mrs. Charles Giddens Donor-Advised Fund
- Joyce and Zelick Greenberg Donor-Advised Fund
- Gary and Lisa Gross Donor-Advised Fund
- J. L. Guelfy, Jr. Donor-Advised Fund
- Roy and Helen Hallmark Fund
- Brian & Jan Hancock Donor-Advised Fund
- Tim Hayward Medical Lecture Fund
- Hurst Family Fund
- Presley C. and Virginia B. Hudson Donor-Advised Fund
- Hurst Family Charitable Fund
- H. T. and Laura Hyde Charitable Fund
- Jackson Family Charitable Fund
- Jasper Family Charitable Fund
- Katsu Foundation
- Kasahaneo Charitable Donor-Advised Fund
- Karen Faulkner Key Donor-Advised Fund
- Elizabeth Faulkner Krewson Donor-Advised Fund
- Legg Family Donor-Advised Fund
- Lowery Donor-Advised Fund
- Lujuan Family Charitable Fund
- Jack and Glenda Mann Donor-Advised Fund
- Mathmos Family Charitable Fund
- Mauldin Family Donor-Advised Fund
- McCook Family Giving Fund
- James McCulloch Foundation
- Michael and Fritter McNally Donor-Advised Fund
- McSwane Family Charitable Fund
- Vicki and Tony Morgan Charitable Fund
- Mengold LLC Charitable Fund
- Stacy and Reid Martin Family Charitable Fund
- F. William and Mary Jo Martin Donor-Advised Fund
- Niblack Charitable Fund
- Nichols Family Fund
- Lezcrande and Cassandra Northcutt Donor-Advised Fund
- Olivia Smith “For Good” Donor-Advised Fund
- Louis andpeaches Owen Donor-Advised Fund
- Julie and Terry Pace Charitable Fund
- Pangburn Charitable Fund
- William Prue Donor-Advised Fund
- Rex and Janice Pritchard Charitable Fund
- Roabe Family Charitable Fund
- Rehn Family Fund
- Riestenberg Family Charitable Fund
- Rod and Merle Mabry Family Charitable Fund
- Cynthia and Whit Ritter Donor-Advised Fund
- The River Fund
- Ken and Joyce Rody Ritter-Donor Funded

**Nonprofit Endowment Funds**
- American Forestry Museum Endowment Fund
- Dermatology Associates of Tyler Minority Scholarship Fund
- All Saints Episcopal School of Tyler
- Alzheimer’s Alliance of NE Texas, Inc. Endowment Fund
- The ARC of Smith County Endowment Fund
- Azle/Evans Endowment Fund
- C.C. and Brenda Baker Endowment for PATH
- BovShaw Health Clinic Endowment Fund
- Boys & Girls Club of East Texas Endowment Fund
- Endowment Fund for the David G. Braithwaite Chair in Biochemistry for the benefit of the University 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
- Camp Tyler Outdoor School Endowment Fund
- Discovery Science Place Endowment Fund
- Education & Family Endowment Fund for Tyler Family Assistance Center at First Baptist Church
- Edgewood Heritage Park Permanent Endowment Fund
- Kent & Kelly Ellis Scholarship Fund for Texas College
- East Texas Crisis Center, Inc. Endowment Fund
- East Texas Symphony Orchestra Endowment Fund
- John Evans Endowment Fund for the Benefit of the East Texas Symphony Orchestra
- First Baptist Downtown Missions Ventures Endowment Fund
- Great Trinity United Way Endowment Fund
- Habitat For Humanity Of Smith County, Texas Endowment Fund
- Helen Graham Endowment for Hospice of East Texas
- Helen Graham Endowment for Marvin UMC Missions
- Helen Graham Endowment for Animal Shelter
- Historic Tyler, Inc. Endowment Fund
- Hospice of East Texas Endowment Fund
- Helen Jackson Tyler Endowment Fund
- Ben J. Evans Endowment Fund
- Junior League of Tyler Beverly Beardall Scholarship Endowment Fund
- Kid Reach of MI/A Greater Tyler Endowment Fund
- Lindale ISD Education Foundation Endowment Fund
- Lighthouse for Christ Mission Endowment Fund
- Lindsey Police and Firemen’s Endowment Fund
- Tyler City Council of Tyler Adult Literacy Endowment Fund
- Longview Faithful Shepherd Foundation
- Mid-County Wheels Endowment Fund
- Barre and Gene Mongold Fund
- Martin Family Fund for the United Way of Tyler/Smith County
- Nacogdoches Area United Way Endowment Fund
- Newtawagen Endowment Fund
- PATH Endowment Fund
- Rieder-Beard Endowment Fund for East Texas Crisis Center
- C Jarvis and Evelyn C Anderson Endowment Fund
- Jerald B Sanford Gregg County Animal Shelter Endowment
- Tyler-Smith County Juvenile Justice Center Endowment Fund
- Smith County Bar Foundation Designated Fund
- D. Coulter Templeton Fund
- Therapet Fund
- Tributary Retreat Center Donor Fund
- John Wingate Truitt Log Cabin Endowment Fund
- Tyler Biking/Hiking Trails Fund
- Tyler Junior Golf Foundation Donor Fund
- City of Tyler Park Foundation
- Winnisnton Community Resource Center
- Designated Fund
- Arts Council of Tyler Foundation
- Baton Rouge Charitable Fund
- Bexar Family Charitable Fund
- Boy Scout Field of Interest Fund
- Roy & Betty Chadwick Charitable Fund for Nursing
- East Texas Giving Day Fund
- East Texas Health Needs Network Fund
- Endowment Fund for the Benefit of the East Texas Symphony Orchestra
- Children’s Association and the University of Texas at Tyler for the Braithwaite Performing Arts Program
- East Texas Senior and Disabled Persons Field of Interest Fund
- East Texas Veterans Alliance Foundation
- Fraternity of Omega Psi Phi, Inc.
- Mrs. AD Francis Endowment Fund
- The Hometown Garden
- Hope for Africa Charitable Fund
- Impact Van Zandt Fund
- Macy Cheever Memorial Fund for Courageous Youth
- Burnt Knob Nature Station Charitable Fund
- Edwin A. “Blue” and Janice Owen Miller Charitable Fund
- Nacogdoches Texas Public Health District Fund
- Oil Patch Benevolence Fund
- The Pitts Health Foundation
- Gledyis and Thomas “T.B.” Stewart Community Education Fund
- Tyler Library Endowment Fund
- Women’s Fund of Smith County Endowment Fund
- Birdwell Elementary School Fund
- University of Texas at Tyler Foundation Project Fund

**Scholarship Funds**
- Art Excellence Scholarship Fund
- Partners in Arts Scholarship Fund
- Barbara Basie Early College Scholarship Fund
- Brook Hill Founder’s Scholarship Fund
- David G. and Jacqueline M. Brathwaite Scholarship Fund
- David G. and Jacqueline M. Brathwaite Scholarship in Medicine, Biotechnology and Veterinary Medicine
- Jacqueline M. Brathwaite Scholarship Fund for the benefit of the TJC School of Nursing
- David G. and Jacqueline M. Brathwaite General Scholarship Fund
- Dr. Elbert H. Caldwell Scholarship Fund
- Stanley United Scholarships Fund
- Adam Carroll Scholarship Fund
- Citizens State Bank Foundation State Employees’ Children’s Scholarship Fund
- Frances Cowan Gibson Fine Arts Scholarship
- R. Don Cowan Music & Performing Arts Scholarship
- Martha J. Critchfield Women in Finance Scholarship Fund
- Expedition Tyler Riser High School Scholarship
- Helen Elbert Scholarship Fund
- Roy & Betty Erickson Scholarship Fund
- East Texas Symphony Orchestra Scholarship Fund
- Alex Fleming Infinity Scholarship Fund
- Winfred K. George Scholarship Fund
- Juliette Low Amazing Girls Scholarship Fund
- Joan and Jim Guillet Texas Tech Scholarship
- Carroll and Casey Gurasan Scholarship Fund
- Richard B. and Mary Lou Hamm Scholarship Fund
- Jackson Huse Scholarship Fund
- Katie’s Kids Scholarship Fund
- Tim King Memorial Scholarship Fund
- Velma Lemons Scholarship Fund
- Laura Lewis Memorial Scholarship Fund
- Kenneth L. & Robert Miles JBBBA Scholarship Fund
- Mark W. Allen Memorial Scholarship Fund
- Sidney Rex Moughon Scholarship Fund
- Frederic Michael Nacnich Memorial Scholarship Fund
- Natural Gas Society of East Texas Scholarship Fund
- Gary Neil Memorial Scholarship Endowment
- Ronda Perry Scholarship Fund
- Peace Officers and Firefighters Scholarship Fund
- Glenn and Vivian Pifer Memorial Scholarship Fund
- Ben and Pomie Ramsey Scholarship Fund
- Leslie Reid Memorial Scholarship Fund
- Retail Merchants Association Scholarship Fund
- Smith County Baptist Minister Scholarship Fund
- The Seiber Tyler ISD Foundation Scholarship Fund
- Don Stevenson Memorial Scholarship Fund
- Gladys and Thomas “T.B.” Stewart Scholarship Fund
- Gladys and Thomas “T.B.” Stewart Texas College Scholarship
- The Gerald and Charity Stoker Memorial Scholarship Fund
- Texas Rose Festival Scholarship Fund
- Tyler Citizens Police Academy Alumni Association Scholarship Fund
- Vision for Your Future Scholarship
- Whitehouse Young Farmers Scholarship Fund
- Sharon and Roy McCormick Memorial Scholarship Fund 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 at 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

Strategy: 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.

Portfolios: 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.

**CONSERVATIVE**

Objective: preservation of capital and maintenance of purchasing power

- conservative
  - 80% Fixed Income
  - 20% Equities

The conservative portfolio is 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.

**MODERATE**

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.

**GROWTH**

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, Southside Wealth Management, Advisory Member
- 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, 2018

ASSETS
2008 - 2018, in millions

GRANTS
Total Grants $15,432,611

2018 Number of Funds by Type
Donor-Advised Funds ............... 123
Nonprofit Funds ..................... 89
Scholarships ......................... 70
Designated Funds .................... 78
Unrestricted .......................... 1

2018 total funds: 361

GRANTS BY YEAR
2012 - 2018, in millions
Executive Committee

**Tony Morgan**
Founding Partner
Gollob Morgan Peddy PC
*Board Chair*

**Tiffany Kirgan**
CLU, CFA, CFP
Financial Advisor/ Partner
Johnson Financial Group
*Vice Chair/ Governance Chair*

**Michael Bosworth**
President
Bosworth & Associates
*Treasurer*

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

**Roe Buckley**
Chief Financial Officer
Mewbourne Oil Company
*Audit Chair*

**Barbara Bass**
CPA
Gollob Morgan Peddy PC
*Grants Chair*

**Alan Roseman**
CPA, CFA, CAP
Owner/ Advisor
Roseman Wealth Advisors
*Investment Chair*

**Doug Bolles**
Executive Vice President
Southside Bank
*Immediate Past Board Chair*

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**Board of Directors**

- **Marilyn Abegg Glass**
  Chairman of the Board
  Abegg & Associates

- **Jon Alexander**
  Attorney
  Jasper Ventures, Inc.

- **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

- **Steve Dement**
  President
  Landmark Title Company

- **Jay Ferguson**
  Headmaster
  Grace Community Schools

- **Kimberly Fish**
  Freelance Writer & Community Volunteer

- **Dawn Franks**
  President
  Your Philanthropy

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**Advisory Board**

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

- **Edwin Holt**
  CEO
  Holt Creative Group

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

- **Gordon Northcutt**
  Vice President & Trust Officer
  Vera Bank

- **Dale Lunsford**
  President
  LeTourneau University

- **Steve Roosth**
  President
  Roosth Production Company

- **Kristen Seeber**
  President & CEO
  Women’s Fund of Smith County

- **Scott Terry**
  Retired Investment Advisor

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**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

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ETCF serves 32 counties in East Texas.
Philanthropy builds community and changes lives. East Texas Communities Foundation supports philanthropy by offering simple ways for donors to achieve their charitable goals.