Love Where You Live.

CELEBRATING 30 years OF GENEROSITY

ETCF
East Texas Communities Foundation
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.

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.

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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

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.

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.

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 careerer as an estate attorney, mother and philanthropist. Pictured left to right: Kathryn Miree, Kyle Penney, Kay Latta, Sharon Howell and Kristen Seeber.

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.

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ETCF fund holders recommended grants in excess of $12 M

ETCF staff processed 1,719 grant recommendations.

2019

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Love Where You Live.

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

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: 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.

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.
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.
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.

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.

Education: Thirteen computers were replaced at the Longview Public Library thanks to a grant made to the Friends of 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.
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.”

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.

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.
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.

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.

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.

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.
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

$1,308,861 raised in 18 hours from 3,603 Gifts

Purpose: To provide support and resources to local non-profits in East Texas.

2019

EAST TEXAS GIVING DAY
Give Where You Live

Nonprofits: 185

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

Percentage of Donors that Covered the Fees: 76%

Total Matching Funds Raised by Nonprofits: $651,682

$1,308,861 raised in 18 hours from 3,603 Gifts

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2019
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 into 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 I of a Wildlife Habitat facility that will provide a permanent homes for rescued tigers and bears. This naturally wooded area consists of three one-acre habitats which will better emulate the animals’ physical, social and psychological needs.

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 donating. 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, KRE ABC 9 serving Lufkin, Jack FM 106.5, KYKX 105.7 of Longview, KVNE 89.5 and KGTY 93.1, Mix 107.7 and KDYN 93.9 of Paris Texas, KALK 97.7 and KSCN 96.9 of Mt. Pleasant, KISS FM 92.7 Paris, KCKS 105.1 in Lufkin and KZOX 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.
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.

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.

<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>1.39%</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 1.00 -2.25%, decreasing as the assets grow larger depending on the choice of investments.</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 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
- Adams Family Donor-Advised Fund
- Sidney and Anna Lee Allen Charitable Fund
- Allison Family Donor-Advised Fund
- Melinda and Kirk Allen Charitable Fund
- Anderson-Valentia Donor-Advised Fund
- Jeff and Sissy Austin Donor-Advised Fund
- Jeff and Jackie Badgers Charitable Fund
- Baptista Charitable Fund
- Edgar and Lisa Baker Charitable Fund
- Glenda Barnett Charitable Fund
- Barbara and Billy Bass Charitable Fund
- Lisa and David Beard Donor-Advised Fund
- Carl and Evelyn Bechler Donor-Advised Fund
- Thomas W. Becich, MD Donor-Advised Fund
- Marilyn and Brinnink Donor-Advised Fund
- Brad and Ann Brookshire Donor-Advised Fund
- Tim and Michelle Brookshire Family Fund
- Brown Family Donor-Advised Fund
- Frank J. Budge and Marilyn Budge Fund
- Joyce and Robert Donor-Advised Fund
- Burt Family Fund
- Shirley and Don Chase Donor-Advised Fund
- Dirk and Patty Chase Charitable Fund
- Cordell Family Donor-Advised Fund
- Betty Danielson Memorial Fund for Youth
- Suzanne Hunt Davis Donor-Advised Fund
- Mary C. Decker Charitable Fund
- Denison Fund
- Dent Charitable Fund
- Dimond Family Charitable Fund
- Karleen Draper Donor-Advised Fund
- Larry and Dana Reming Charitable Fund
- Johnna and Kevin Fullen Charitable Fund
- Gertrude Windsor Garden Club Charitable Fund
- Gerald Family Donor-Advised Fund
- Emily and Gerald Gibson Fund
- Greater Longview United Way Donor Fund
- Jim and Leigh Gomillion Charitable Fund
- Dr. and Mrs. Charles Gordon Donor-Advised Fund
- Joyce and Zelika Greenberg Donor Fund
- Fred and Ginger Haberle Charitable Fund
- Henry and Carol Wallace Donor-Advised Fund
- Cecil and Wanda Fannin Family Donor-Advised Fund
- Amy and Tom Wldren Donor Fund
- Ken and Susan Wiedeman Charitable Fund
- Youth Challenge Memorial Fund

**Designated Funds**
- Sara-Catherine Shirley Memorial AMBUCS Scholarships
- Barker Family Charitable Fund
- Bethesda Health Clinic Designated Fund
- Blooper Elementary School Fund
- Blankets and Beds Fund
- Brownlow ISD Education Foundation
- Butcher Designated Fund
- Janet L. Collard Faith Baptist Church Designated Fund
- Chair School of East Texas Scholarship Fund
- Judge Caisey Clark Trauma-Informed Training Fund
- Dennis and Terry Darby 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 and the University of Texas at Tyler for the Brathwaite Performing Arts Program Event Tickets Funded by the Ms. AD Francis Endowment Fund
- The Hometeam Garden Fund
- John Gomillion Family Charitable Fund
- Cardy F. Hyman Fund
- Karen and Scottie Scott & White Dallas Foundation Designated Fund
- Literary Council of Tyler Operating Reserve
- Many Children's Education Fund
- Manytown Memorial Fund for Courageous Youth
- Burt and Nancy Manns Charitable Fund
- Edwin A. "Blair" and Janice Winters Miller Charitable Fund
- Nacocholes HOPE Designated Fund
- Oil Patch Benevolence Fund
- R.P. and Jessica Shaw Fund
- Smith County Bar Foundation Designated Fund
- Sowing The Seed Fund
- Gladys and Thomas "T.B." Stewart Community Education Fund
- Ric Smothers Memorial Fund
- Palestine University Academy Fund
- UT Tyler Palestine Campus Designated Fund
- D. Clifton Chinion Fund
- Therapeutic Funds
- Trinity University Center Designated Charitable Fund
- John Wingate Trout Log Cabin Fund
- Tyler Library Foundation Fund
- City of Tyler Park Foundation
- University of Texas at Tyler Foundation Project Fund
- Connie Wafeedak Fund
- Winnie Brown Library Community Resource Center Designated Fund

**Nonprofit Endowment Funds**
- Dermatology Associates of Tyler Minority Scholarship Fund
- All Saints 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. Brathwaite Chair in Biochemistry for the benefit of the Univ. of Texas at Tyler A. & Mary 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
- First Tee of Tyler Fund
- Judge "Benny" B. Whitehead Park Endowment Fund
- Pettus Scholarship Endowment Fund
- Pori Family Charitable Fund
- B. Eugene School Family Charitable Fund
- Lulac Charitable Fund
- B. Eugene School Family Charitable Fund
- The Texas Chest Foundation Fund
- Franklin County Memorial Fund
- Genevieve Memorial Fund
- McCoy Heart Endowment Fund
- Life Membership endowment Fund
- Hillman O. McKemie Fund
- Isadore Rosenth Fund
- Wheat Memorial Fund
- Tyler Civic Theatre Endowment Fund
- Texas Education Fund
- Tab and Bonnie Beal Tyler ISD Foundation Endowment Fund
- Brathwaite Tyler ISD Fine Arts Endowment Fund
- Tyler ISD Foundation Carns Shirley Scholarship Endowment Fund
- Tyler ISD Foundation Endowment Fund
- Frances Cowan Gibson Tyler ISD Fine Arts Endowment Fund
- Tyler ISD Foundation Mariel Madland Scholarship Endowment Fund
- John L. and Mary M. Tracy Endowment Fund for Ashway
- John L. and Mary M. Tracy Endowment Fund for East Texas Crisis Center
- John Wingate Trout Log Cabin Endowment Fund
- Trinity School of Texas Endowment Fund
- Tyler Dairy Nursing Endowment Fund
- Tyler Rotary Foundation Endowment Fund
- University of Texas at Tyler Foundation Endowment Fund
- United Way of Tyler/Smith County Fund
- Winnie Brown Library Community Resource Center Endowment Fund
- Windridge Therapeutic Equestrian Center of East Texas Endowment Fund
- Women's Fund of Smith County Sustaining

**Scholarships Funds**
- Art Excellence Scholarship Fund
- Partners in Arts Scholarship Fund
- Barbara Eastwood College Scholarship Fund
- Brook Hill Founder's 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
- Hugh F. Brown Memorial Scholarship
- Dr. and Mrs. Campbell Scholarship Fund
- Adam Carroll Scholarship Fund
- Citizens 1st Bank/Perkins Family Foundation State Employees Children's Charities Scholarship Fund
- Donald Scott Cooper Nursing Foundation
- Frances Cowan Gibson Fine Arts Scholarship
- Robert D. Cowan & Performing Arts Scholarship
- Martha J. Difftendorf Women in Finance Scholarship Fund
- East Texas First Class Scholarship Fund
- Elfenbein Scholarship Fund
- Roy & Betty Erickson Scholarship Fund
- East Texas Great Cause Council Scholarship Fund
- East Texas Geologic Society Scholarship Fund
- J. Tommy Gann Scholarship Fund
- Alex Fleming Infinity Scholarship Fund
- Wanda J. George Scholarship Fund
- Juliette Low's Amazing Girls Scholarship Fund
- Jean and Jim Guile Texas Tech University Scholarship
- Carl and Casey Guthrie Scholarship Fund
- Edna Paul Faber Harley Visual Arts Scholarship
- Richard B. and Mary Lou Hamm Scholarship Fund
- Jackeston Scholarship Fund
- John Harris Scholarship Fund
- Joey Johnson Memorial Scholarship Fund
- Kathy's Kids Scholarship Fund
- Tim King Memorial Scholarship Fund
- Velma Lemons Scholarship Fund
- Laura Lewis Memorial Scholarship Fund
- Kendall Lewis & Robert Miles Memorial JBTA Scholarship Fund
- Allen and Nancy Locklin Scholarship Fund
- Christopher Lyon Memorial Scholarship Fund
- Laura W. Allen Memorial Scholarship Fund
- Wayne and Margorie Morrison Scholarship Fund
- Sidney Mouchon Texas A&M Scholarship Fund
- Carole and Casey Guthrie Scholarship Fund
- Frederick Michael Nachman Memorial Scholarship Fund
- Nacogdoches County Endowment Fund
- Gary Neel Memorial Endowment Scholarship
- Rhonda Perry Scholarship Fund
- Kathy's Pooper Master Woodcraft Scholarship
- Glenn and Vivian Prater Memorial Scholarship Fund
- Ben and Florine Ramsey Scholarship Fund
- Leslie Reed Memorial Scholarship Fund
- Rey Federation Scholarship
- Retail Merchants Association Scholarship Fund
- Robinson Family Memorial Scholarship Fund
- Smith County Baptist Minister Scholarship Fund
- Sebeto Tyler Scholarship Fund
- Gladys and Thomas "T.B." Stewart Scholarship Fund
- Gladys and Thomas "T.B." Stewart Texas College Scholarship Fund
- The Gerald and Charlie Stoiker Memorial Scholarship Fund
- Ben & Bettye Biz Scholarship Fund
- Joe Leverett Foundation Scholarship Fund
- T. J. Key Scholarship Fund
- Henry & Evelyn Keck Scholarship Fund
- Tadge & Bill O'Donnell Scholarship Fund
- Tatum Music Scholarship
- Womack Memorial Scholarship Fund
- Texas Rose Festival Scholarship Fund
- Tyler Citizens Police Academy Alumni Scholarship Fund
- Vision for your Future Scholarship Fund
- Band of Angels Memorial Scholarship
- Womack Memorial Scholarship Fund
- Sheryl A. Willis MD Medical Scholarship Fund
- Randy Womack Memorial Firefighter Scholarship
- A. D. and Mary Womack Scholarship Fund

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*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.

- **Conservative**
  - Objective: preservation of capital and maintenance of purchasing power
  - 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.

- **Moderate**
  - Objective: maintain purchasing power and provide growth of capital and income
  - 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
  - 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.
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*Deceased

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.