

Pulling Together



Simplified Charitable Giving

ANNUAL
REPORT
2020

2020 started out positive until COVID shut down the economy and instantly put millions of people out of work in March. The pandemic put enormous stress on the nonprofit community. Many organizations had to find new ways to deliver their services. Other charities were inundated with people who suddenly found themselves in need of assistance. Still other charities had to suspend their services indefinitely.

Donors rose to the occasion around our region, providing support for our neighbors in need and providing critical support to keep charities operating in the midst of the pandemic.

East Texas Giving Day came at an opportune time in late April 2020 and the event raised a record breaking amount of support for over 195 participating East Texas charities.

Following the election and with news of vaccines on the horizon, the stock market rebounded in late 2020 with the final months of the year bringing significant growth to the foundation.

What a year! Thank you for allowing ETCF to assist you with your charitable giving in 2020 and I hope that it might inspire others to allow our organization to assist them as well.



Kyle L. Penney
President,
East Texas Communities Foundation

Tiffany Kirgan
Board Chairperson,
East Texas Communities Foundation

ETCF board and staff adapted to new ways of communicating during the Covid-19 pandemic by launching hybrid board meetings.

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

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2020 Financial Summary

Total Assets 12/31/19..... \$110,053,749

2020 Contributions \$13,260,442

2020 Grants (\$9,226,022)

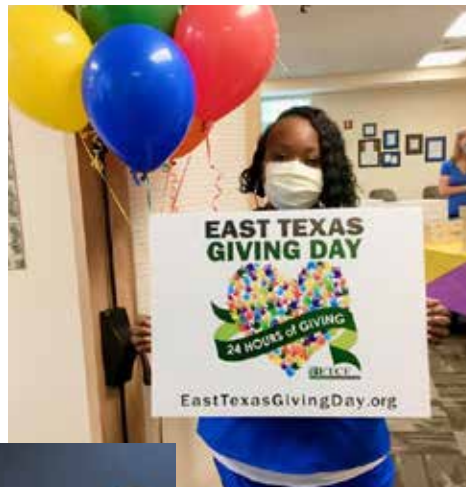
Net Investment Activity \$11,757,541

Net Operating Expenses (\$897,776)

Total Assets 12/31/20..... \$124,929,630

Table of Contents

Pulling Together by County.....	2-7
Pulling Together Milestones.....	8
East Texas Giving Day 2020	9
ETCF Fund Types	10-13
ETCF Comparison Chart.....	14
Partial List of ETCF Funds	15
Professional Advisors	16
Investments	17
2020 Financials	18
Current Board of Directors.....	19



Community Improvement: Donors gave generously during the early giving phase of the East Texas Giving Day campaign in response to the demand for services caused by the Covid-19 pandemic. More than \$300,000 was raised in the three weeks leading up to the official event on April 28, 2020. Complete event details can be found on page 9.



Education: Tyler ISD School Board members accepted a check from East Texas Communities Foundation in the amount of \$91,362 at a school board meeting in December. The Tyler ISD Future Fund was established by area citizens to receive public contributions to offset expenses related to renaming both Tyler ISD high schools. Pictured Left to Right: Aaron Martinez, Fritz Hager, Kyle Penney, Wade Washmon, Dr. Patricia Nation, Yvonne Atkins, Artis Newsome and Andy Bergfeld.

DAF's Increase Giving in Response to COVID-19

In response to the COVID-19 pandemic, Donor-Advised Funds have been quick to support local relief efforts and increase grantmaking to nonprofits in East Texas and beyond. ETCF reported that Donor-Advised Fund grant volume, excluding East Texas Giving Day grants, was up 57 percent during March and April 2020 compared with the same period in 2019. During this two month window-of-giving, donors granted more than \$1.4 million to nonprofits addressing COVID-19, helping to support over 160 charities both locally and nationally.

“Donor-Advised funds are ideal tools for receiving contributions when stocks and other assets are highly appreciated, such as we saw at the end of 2019,” said Kyle Penney, President of East Texas Communities Foundation. “DAFs are equally well suited to deploy resources to make an immediate impact at a time of great need as we saw with the Covid shutdown. We believe our donors will continue to act generously as the needs facing our neighbors and the nonprofit organizations working with them remain high.”



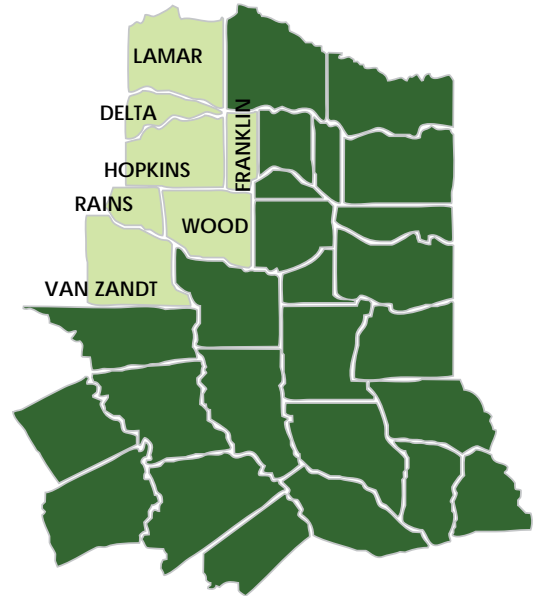
The East Texas Food Bank provided mobile food distributions sites in Tyler, Longview, Marshall and Lufkin in response to the pandemic. DAF fund holders at ETCF supported this effort throughout this difficult time.

Pulling Together in 2020.

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



Education: Magdalena Gutierrez, a graduate of Winnsboro High School, was the recipient of the Gerald and Charlie Stoker Memorial Scholarship. This scholarship was established to provide a scholarship to a graduating senior from Winnsboro High School.



Animals: The Pegasus Project, based in Van Zandt County, Texas received a grant to assist with the care and rehabilitation of horses. The Pegasus Project is an equine rescue whose mission is to rescue, rehabilitate, retrain and rehome neglected, abused and abandoned horses, donkeys and mules throughout Texas.



Arts & Culture: Winnsboro Center for the Arts was awarded a grant to help plan for a book festival. The inaugural Festival of Books took place in the downtown Winnsboro Cultural Arts District. Activities included a farmers market, children's story time, crafting and panel discussion featuring Texas authors. The Winnsboro Center for the Arts mission is to engage people in the arts through educational programming, cultural experiences and entertainment.

The Mrs. A.D. Francis Endowment Fund awarded a grant to the Winnsboro Community Resource Center to assist with the purchase of a commercial freezer to meet the increased demand for services in Wood County.

Winnsboro Community Resource Center (WCRC), helps the economically disadvantaged in the community by providing the stepping stones that will lead to safety, stability and a path to self-sufficiency. In 2019, WCRC served over 1900 families.



A grant from the A.D. Francis Endowment doubled freezer capacity for Winnsboro Community Resource Center. Pictured left to right: Ray Richter, Christopher Birlew, Anna Thomas, Ron Attaway and Theresa Muller.



Human Services: The Hospice of Texarkana received a grant for general operations and program training. The Hospice of Texarkana's mission is to significantly enhance the end of life experience by ensuring access to quality hospice care.



Nonprofit Development: 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.



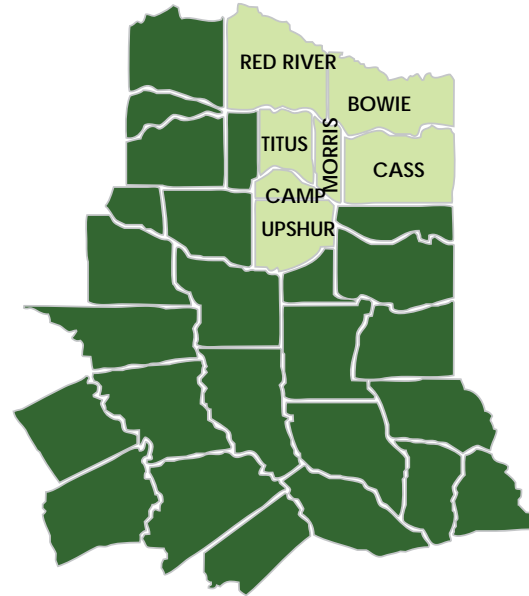
Education: Kaitlyn Castro, from Gilmer High School, was awarded the Betty and Roy Erickson Scholarship. The Betty and Roy Erickson Scholarship was established by Big Sandy residents Betty and Roy Erickson. This scholarship is awarded to graduating high school seniors in East Texas who have earned a 4.0 GPA and outstanding SAT/ACT scores.

Morris County landmark, The John Wingate Truitt Log Cabin, celebrated it's 180th anniversary in 2020. The Truitt Association has utilized a fund at East Texas Communities Foundation to manage the John Wingate Truitt Log Cabin Endowment Fund for the benefit of the restoration of this historical home site.

In 2009, the Texas Historical Commission designated the John Wingate Truitt Log Cabin Site a State Archeological Landmark.

Pulling Together in 2020.

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



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.



Dale Truitt, a direct descendant of the Truitt family stands with Barbara Truitt Shirley inside the restored historic cabin.

Pulling Together in 2020.

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



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.



Youth Development: A grant was made to Troup High School to benefit the Ag Science Department welding program. The funds helped the school purchase equipment.

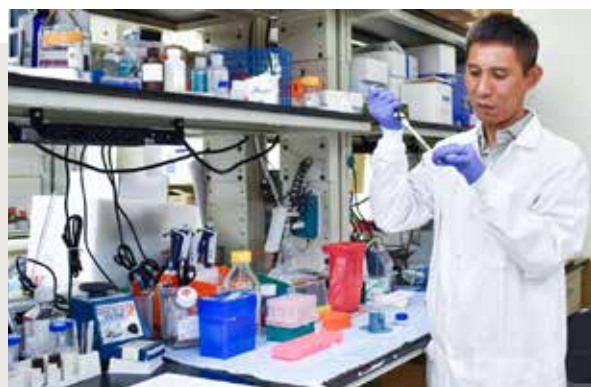


Youth Development: High school football season wouldn't be the same without the cheer squad. A grant was made to T.K. Gorman High School Athletics that will provide support for the Crusaders cheerleader program.



Human Services: A team of volunteers with Labor of Love in Henderson County constructed a wooden porch and ramp for an 8 year old near Athens. Funding for the project came from a grant from the Edwin A. "Blue" and Janice Owen Miller Charitable Fund at ETCF.

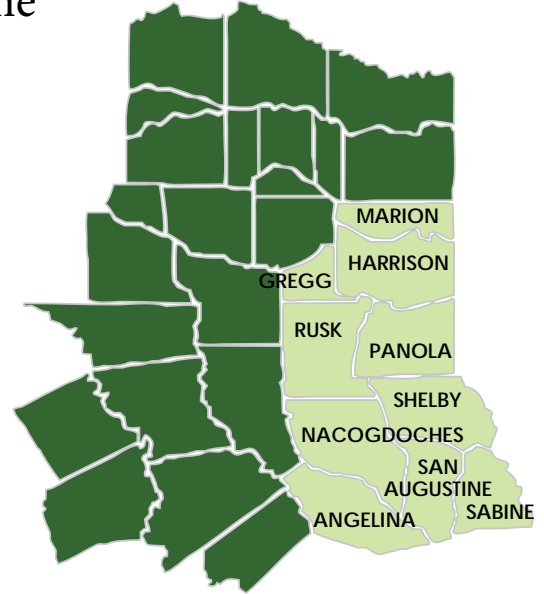
Researchers at the University of Texas Health Science Center at Tyler received a grant to assist with efforts on several projects to help fight the COVID-19 pandemic. Pictured is Dr. Guohua Yi, a virologist who worked to develop a new test to detect COVID-19.



Pulling Together in 2020

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

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.



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 them overcome challenges. On average, 400 at-risk children are served each week.

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.



Religion: The John Harris Charitable Fund made grants to the First United Methodist Church of Center to benefit their newly formed Media Ministry. The ministry will incorporate audiovisual equipment to help the online viewer move from being a spectator to actively participating in worship.



The John Harris Scholarship is a generous legacy of a man who was devoted to his community, his church, and education. Mr. Harris earned a degree in business and music at Baylor University, then returned to his hometown of Center, Texas, to teach high school students. This fund was established upon his death to help students from Center High School attend college.

Three students were awarded the John Harris Scholarship for 2020. Taylor Burch, Benjamin Galindo and Mallory Fausett. Ms. Fausett, pictured here, plans to attend Tyler Junior College and focus on a career in healthcare.

ETCF Reaches \$100,000,000 Grant Milestone

ETCF staff, donors and board members gathered to celebrate a \$50,000 grant to the Children's Advocacy Center of Smith County. With this award, ETCF has now distributed more than \$100,000,000 in cumulative grants over the course of 30 years.

"We don't usually celebrate the overall dollar amount of the grants we make in a year, but this year is special," said Kyle Penney, President of East Texas Communities Foundation. "We are honored to celebrate crossing the milestone of \$100 million in cumulative grants and pleased to do so with a grant to the Children's Advocacy Center of Smith County, which is such an incredible community resource."

Established in 1989, East Texas Communities Foundation supports philanthropy by offering simple ways for donors to achieve their charitable goals.

The grant to CACSC was initiated from the Jasper Family Fund held at East Texas Community Foundation. "I can't think of a more deserving organization to have received a gift from our family fund," said Brent Jasper. "Then to know that it was this grant that pushed ETCF over \$100,000,000 in giving is really icing on the cake."



ETCF awards a check for \$50,000 to Children's Advocacy Center of Smith County. Pictured left to right back row: Dana Durman, Michael Bosworth, Les Campbell, and Brent Jasper. Front Row left to right: Kyle Penney, Susan Jasper, Terri Smith and Jane Campbell.

Tyler Area Healthcare Worker Support Fund created for those on the frontlines

East Texas Communities Foundation, East Texas Restaurant Association, and Smith County Medical Society Alliance joined forces in an initiative that helped both local restaurants and healthcare workers.

The 2020 Area Healthcare Worker Support Fund was created in March to allow donors a platform to provide meals to hospital staff working the frontlines of the COVID-19 crisis while supporting locally owned restaurants.



Johannah Hargrove and staff at UT Health East Texas take a moment out from serving patients to say thank you to those that donated to the Tyler Area Healthcare Worker Support Fund.

"Every day we are inspired by healthcare workers who are going above and beyond to make sure our communities are healthy and safe," said Kyle Penney, President of East Texas Communities Foundation. "We all have a part to play in overcoming this virus. ETCF was pleased to be able to offer the public a way to lend a hand in providing meals for our healthcare workers while supporting our local restaurants and their employees."

Tyler City Councilman Bob Westbrook, who leads the restaurant association, said the initiative was launched at a critical time in our community at the request of Tyler Mayor, Martin Heines.

"In March, the pandemic was hitting our community in unprecedented ways," Westbrook said. "Creating a fund at ETCF was a simple way to address the needs at the time in our medical community as well as supporting our locally owned restaurants."

The fund provided almost 3,000 meals for area hospital workers in Smith County.

"We could not be more proud of the outcomes from this fund," said Penney. "This Healthcare Workers fund is an excellent example of how the Community Foundation can be utilized in times of crisis, and quickly address pressing needs."

35% of donors indicated they were first-time donors to the organization

Total Granted to ETGD Participants by ETCF Donor-Advised Funds **\$630,200**

\$301,782 Total Matching Funds Raised by Nonprofits



KETK NBC 56 dedicated three hours of their midday broadcast to promote area nonprofits in an effort to raise awareness on East Texas Giving Day. Pictured with ETCF President Kyle Penney is East Texas Live anchor, Cynthia McLaughlin.

EAST TEXAS GIVING DAY

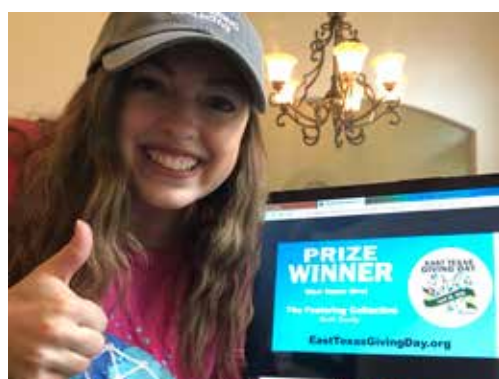


2020

\$2,214,804

raised in 18 hours from 5,746 donations

195 PARTICIPATING NONPROFITS



Fostering Collective Communications Coordinator Lindsay Hanks celebrates their organization winning a prize on East Texas Giving Day 2020.



Elizabeth Opiela with Blessings of Grace Marion County sorts food on East Texas Giving Day 2020.



Students of Paris Junior College in Lamar County, helped raise community support on East Texas Giving Day 2020.

\$2.2 Million Raised for Area Nonprofits through East Texas Giving Day

Charities in East Texas benefited from the generosity of more than 5,746 donors during East Texas Giving Day, the region's recognized day of giving to support local nonprofits.

The online fundraising effort began at 6:00 a.m. on Tuesday, April 28th, and ended at midnight. Donors contributed \$2,214,804 to support the causes they care about in 32 East Texas counties.

"East Texas residents stepped up in this unprecedented time of need," said Kyle Penney, President of East Texas Communities Foundation, which hosted this year's

event. "Nonprofit organizations spent countless hours spreading the message about the needs facing our region, especially related to how they are responding to the pandemic. The response from our community, as a result of this effort, was tremendous and humbling."

During East Texas Giving Day, nonprofits encouraged their donors and the public to make charitable donations online at www.EastTexasGivingDay.org. Donors could choose from among 195 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 supported nonprofits of all sizes. Smith County charities lead the charge with The Mentoring Alliance receiving the most overall contributions with a total of \$189,017, followed by Texas A&M University Texarkana Foundation in Bowie County raising \$94,835 and East Texas Food Bank, based in Smith County with \$84,428.

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. Donors can use personal assets – such as cash, securities, business interests, real estate, mineral interests, retirement distributions, etc. – to support their philanthropic interests. ETCF works with individuals, families, businesses, and nonprofit organizations, to help determine which of our five fund offerings would help them meet their charitable goals 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. Donor-Advised Funds can be a useful tool to implement when creating your estate plan.



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 endowed 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 flexible and easy ways 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 can be a useful tool to implement when creating your estate plan.

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Make an Initial
Donation



Professionally
Managed Investment



Recommend Grants
to 501c3 Charities

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

Donors may be eligible for an immediate tax deduction in the year the donation is made.

Donors can support IRS-qualified public charities 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.

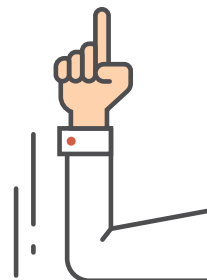
ETCF offers three investment strategies managed by an outside professional firm. Each of the investment portfolios has an actively managed and passive index fund option. If your fund balance is over \$500,000, you can recommend your trusted wealth advisor to work with ETCF to manage the fund.

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.

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 and non-permanent funds 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 or short-term fund with East Texas Communities Foundation is a cost-effective and practical way to manage and build short-term or permanent support for your organization.



ENDOWMENT

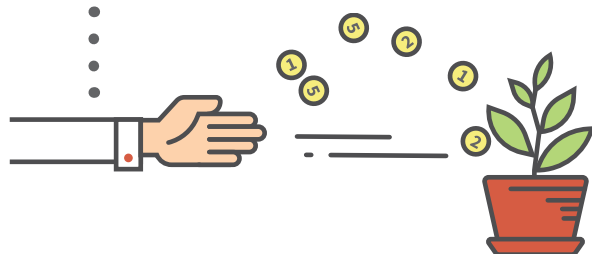
Building For The Future– Now.



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 : ETCF'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 : ETCF 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.



Establishing a Scholarship Fund.

Scholarships are often established by individuals or organizations to support academic interests or to memorialize a loved one. Scholarship funds provide deserving students the opportunity to attend a certain school or pursue a field of study which was meaningful to the donor. Businesses and civic groups may also choose to 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.



Create and Name
the Fund



Students Apply
Online



Celebration and
Recognition

ETCF staff will walk you through the process of naming and creating a scholarship fund so that it meets your charitable goals.

You may create your scholarship through a variety of contributions including cash, real estate, securities, business interests, mineral interests or retirement assets. The minimum for an endowed scholarship is \$10,000.

When you create your fund at ETCF, a public charity, you may be eligible for a tax deduction for contributions up to 30% of your adjusted gross income (AGI) for certain appreciated assets or 60% of AGI for gifts of cash.

ETCF staff work diligently to administer the scholarship program and make sure it achieves your charitable objectives. Students apply through an online application portal which allows them to qualify for multiple awards from our many unique scholarship funds.

ETCF staff work with donors, recruit volunteers and facilitate the evaluation committees to review the scholarship applications and award the recipients.

Recipients are awarded scholarships based upon criteria established by the donor at the time the fund is created.

Once scholarships are awarded, ETCF staff notify the students and their school administrators.

ETCF celebrates the accomplishments of these hard-working students by hosting a reception in May.

Donors, ETCF board, staff, and family of the recipient are invited to take part in celebrating the student's success.

ETCF distributes the scholarship funds directly to the institution that the recipient plans to attend. ETCF staff also follow up with students if the scholarship is renewable.

Why choose ETCF? Compare your options.

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

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

*Fair Market Value **Adjusted Gross income

Make a Difference- Exactly As You Intend

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

PARTIAL LIST OF ETCF FUNDS

Donor-Advised Funds

Adams Family Donor Advised Fund
Allison Family Donor Advised Fund
Amy and Tom Woldert Donor Advised Fund
Anderson-Vukelja Donor Advised Fund
Ashley Prothro Trant Charitable Fund
Bagot Family Charitable Fund
Barbara and Billy Bass Charitable Fund
Baxter Family Charitable Fund
Beryl Berry Donor Advised Fund
Betty Danielson Memorial Fund for Youth
Brad and Ann Brookshire Donor Advised Fund
Brian & Jan Hancock Donor Advised Fund
Brown Family Donor Advised Fund
Bunnie Schulz Memorial Fund
Carl and Evelyn Bochow Donor Advised Fund
Carrie-Ann and Jason Yearly Charitable Fund
Cecil and Bernie Ward Family Donor Advised Fund
Cordell Family Donor Advised Fund
Cynthia and Whit Riter Donor Advised Fund
Denarii Fund
Dent Charitable Fund
Dimond Family Charitable Fund
Dirk and Patti Coleman Charitable Fund
Don and O'Marie Harvey Charitable Fund
Dr. and Mrs. Charles Gordon Donor Advised Fund
Dwayne & Margaret Wilson Charitable Fund
Edgar and Lisa Baker Charitable Fund
Elizabeth Faulkner Kirwan Donor Advised Fund
Emily and Gerald Gibson Fund
Erin and Brent Jasper Charitable Fund
F. William and Mary Jo Martin Donor Advised Fund
Frances D. Swann Donor Advised Fund
Frank J. Budde and Marilyn Budde Fund
Fred and Carol Smith Family Donor Advised Fund
Fred and Ginger Haberle Charitable Fund
Gerard Family Donor Advised Fund
Glenda Barrett Charitable Fund
H.T. and Laura Hyde Charitable Fund
Harry and Gail Wallace Donor Advised Fund
HPP Fund
Hurst Family Fund
Jack and Glenda Mann Donor Advised Fund
Jackson Family Charitable Fund
Jane E. and Les Campbell Charitable Fund
Jasper Family Fund
Jasper Ventures Employee Match Program Fund
Jeff and Jackie Badders Charitable Fund
Jeff and Sissy Austin Donor Advised Fund
Jim and Leigh Gomillion Charitable Fund
Jimmy and Gail Evans Charitable Fund
John and Carol Ann Rowland Charitable Fund
John and Lisa Jones Charitable Fund
Johnna and Kevin Fullen Charitable Fund
Jon and Susan Jasper Charitable Fund
Joyce and Zelick Greenberg Donor Advised Fund
Joyce Buford Donor Advised Fund
Julie and Terry Pace Charitable Fund
Kalos Foundation
Karen Faulkner Key Donor Advised Fund
Karleen Draper Donor Advised Fund
Ken and Joyce Roddy Donor Advised Fund
Kim and Greg Wright Charitable Fund
Lackner Family Charitable Fund
Lagniappe Fund
Larry and Dana Fleming Charitable Fund
Lauren Buford Donor Advised Fund
LeGrande and Cassandra Northcutt Donor Advised Fund
Lisa and David Beard Donor Advised Fund
Lowery Donor Advised Fund
Lujan Family Charitable Fund
Marilyn Joan Brinkman Donor Advised Fund
Mary C. Decker Charitable Fund
Matthews Family Charitable Fund
Mauldin Family Donor Advised Fund
McCook Family Giving Fund
McSwane Family Charitable Fund
Melinda and Rick Allen Charitable Fund
Michael and Fritter McNally Donor Advised Fund
Nancy & Robert Patterson Charitable Fund
Nblack Charitable Fund
Nichols Family Fund
Olivia Smith "For Good" Donor Advised Fund
Pam and Thomas Smith Donor Advised Fund
Pangburn Charitable Fund

Paul and Carla Szafran Charitable Fund
Phil and Sharon Jenkins Charitable Fund
Pioneer Charitable Fund
Presley C. and Virginia B. Hudson Donor Advised Fund
Raabe Family Charitable Fund
Ramey Family Fund
Rex and Janice Pritchard Charitable Fund
Richard and Susan Knarr Charitable Fund
Riehm Family Fund
Riestenberg Family Charitable Fund
Robert B Irwin Foundation
Rod and Merle Mabry Family Charitable Fund
Roy and Helen Hallmark Fund
Sam Roosth Foundation Fund
Scholtes Family Charitable Fund
Schuler Family Charitable Fund
Shirley and Don Chase Donor Advised Fund
Sidney and Anna Lee Allen Charitable Fund
Slacy and Reid Martin Family Charitable Fund
Stephens Family Fund
Steve and Penny Carlie Charitable Fund
Summers Foundation
Suzanne Hunt Davis Donor Advised Fund
T.L.L. Temple Foundation Community Fund
The Triumph DAF
Thomas W. Bochow, MD Donor Advised Fund
Tim and Michelle Brookshire Family Fund
Tim Hayward Medical Lecture Fund
Tokoph Family Charitable Fund
Vicki and Tony Morgan Charitable Fund
William Pirtle Donor Advised Fund
Youth Challenge Memorial Fund

Designated Funds

Blankets and Bears Fund
Bob and Barbara Maupin UMC Frankston Charitable Fund
Brownsboro ISD Education Foundation
Budde Family Designated Fund
Burt and Nancy Marans Charitable Fund
Carolyn & J.D. Jones Agricultural Endowment Fund
Carolyn F. Hyman Fund
City of Tyler Park Foundation
Connie Wakefield Fund
D. Coulter Templeton Fund
Dennis and Terry Darryl Temple Beth El Donor Fund
Doris Evans Gillis Charitable Fund
East Texas Giving Day Fund
Edwin A. "Blue" and Janice Owen Miller Charitable Fund
Evans-Merrick Music Grants Fund
Give Together Now East Texas
Gladys and Thomas "T.B." Stewart Community Edu. Fund
Janette L. Collard Faith Baptist Church Designated Fund
John Harris Community Fund
John Wrigate Truitt Log Cabin Fund
Judge Carole Clark Trauma-Informed Training Fund
Karen Key Baylor Scott & White Dallas Foundation Fund
Lowery Public Health District Designated Fund
Luther's Children Educational Fund
Macy Chenevert Memorial Fund for Courageous Youth
Margo and Mike Ballew Charitable Fund
Mrs. AD Francis Endowment Fund
Northeast Texas Public Health District Fund
Oil Patch Benevolence Fund
Palestine University Academy Fund
R.F. and Jessie Shaw Fund
Roy & Betty Erickson Charitable Fund for Nursing
Smith County Disaster Relief Fund
Southside Park Project Fund
T.J. and LaVerne Plunkett Foundation
The Action Fund
The Bozeman Family Fund
The Hometown Garden Fund
Tyler Area Healthcare Workers Support Fund
Tyler Area Prostate Cancer Charitable Fund

Nonprofit Funds*

A. M. and Lillian Brown Memorial Fund
Alzheimer's Alliance of Smith County Endowment Fund
American Freedom Museum Endowment Fund
Anna Wegener Memorial Camp Scholarship
Arnold T. Sikes Memorial Endowment for the First Tee of Greater Tyler
Band of Angels Memorial Scholarship
Barre and Gene Monigold Fund
Ben E. Jarvis Endowment Fund
Bethesda Health Clinic Endowment Fund
Bill R. Swetmon Educational Endowment Fund
Birdwell Elementary School Fund
Braithwaite Tyler ISD Fine Arts Endowment Fund
C.C. and Brenda Baker Endowment for PATH
Camp Tyler Outdoor School Endowment Fund
Cancer Foundation for Life Endowment Fund
Carolyn and J.D. Jones Agricultural Endowment Fund
Children's Village Endowment Fund
Choir School of East Texas funds
Dermatology Associates of Tyler Minority Scholarship Fund for All Saints Episcopal School of Tyler
Discovery Science Place Endowment Fund
East Texas Crisis Center, Inc. Endowment Fund
East Texas Symphony Orchestra Endowment Fund
Edgewood Heritage Park funds
Edwards Family Endowment for Tyler Family Assistance Center at First Baptist Church
Endowment Fund for the Benefit of the ETSO Association and the Univ. of Texas at Tyler for the Braithwaite Performing Arts Program
First Baptist Downtown Missions Ventures Endowment Fund
Flanagan Nursing Scholarship Fund
Frances Cowan Gibson Tyler ISD Fine Arts Endowment
Genecov Memorial Fund
Gertrude Windsor Garden Club Fund
Gideon's Restoration Camp funds
Greater Longview United Way Endowment Fund
Habitat For Humanity Of Smith County Endowment Fund
Heart of Tyler Endowment Fund
Helen Graham Endowments
Hilman O. McKenzie Fund
Historic Tyler, Inc. Endowment Fund
Hospice of East Texas Endowment Fund
Isadore Roosth Fund
Jerald B Sanford Gregg County Animal Shelter Endowment
John Evans Endowment for the Benefit of the East Texas Symphony Orchestra Association
John L. and Mary M. Tracy Endowment For ETCF
John L. and Mary M. Tracy Endowment Fund for Azleway
John Wrigate Truitt Log Cabin Endowment Fund
Junior League of Tyler Beverly Beard Scholarship Endowment
Kevin and Kelly Eltife Scholarship Fund for Texas College
Kid Reach of MHA/Greater Tyler Endowment Fund
Life Membership Fund
Lighthouse for Christ Mission Endowment Fund
Lindale ISD Education Foundation funds
Lindsey Police and Firemen's Endowment Fund
Literacy Council of Tyler funds
Longview Faithful Shepherd Foundation
Martin Family Fund for the United Way of Tyler/Smith County
Mary John Spence Endowment
McCarly Heart Endowment Fund
Meals on Wheels Endowment Fund
Mr. & Mrs. Bob Herd Fund
Nacogdoches Area United Way Endowment Fund
Nacogdoches HOPE Designated Fund
New Creation Foundation Endowment
Newgate Mission Endowment Fund
PATH Endowment Agency Fund
Retail Merchants Association Endowment for PATH
Riter-Beard Endowment Fund for East Texas Crisis Center
Smith County Bar Foundation Endowment Fund
South Tyler Rotary Foundation Endowment
Tab and Bonnie Beall Tyler ISD Foundation Endowment
The Arc of Smith County Endowment Fund
The Children's Park Endowment Fund
The Mentoring Alliance Endowment Fund
The Texas Chest Foundation Fund
Therapeut Funds
Thurma Rhoades Girls Athletic Scholarship Endowment
Trinity School of Texas funds
Tyler Civic Theatre Endowment Fund
Tyler Day Nursery Endowment Fund
Tyler Library Foundation Fund
Tyler ISD Foundation funds
Tyler ISD Future Fund
Tyler Rotary Foundation Endowment Fund
Tyler/Smith County Juvenile Attention Center Endowment
United Way of Tyler/Smith County Fund
University of Texas at Tyler funds
UT Tyler Palestine Campus Designated Fund
Whitt Memorial Scholarship Fund
Windridge Therapeutic Equestrian Center of East Texas Endowment Fund

Winnsboro Center for the Arts Endowment
Winnsboro Community Resource Center Designated Fund
Women's Fund of Smith County Sustaining Fund

Scholarship Funds

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

*Some nonprofit 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 can be the charitable arm of your professional advisory team, supporting you and your clients through every step of the giving process.

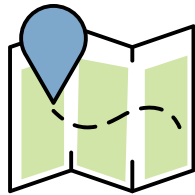
We can help you and your clients:



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



ETCF President, Kyle Penney greets economist, Dr. Ray Perryman and ETCF board member, Doug Bolles at the East Texas Estate Planning Council lunch in November.

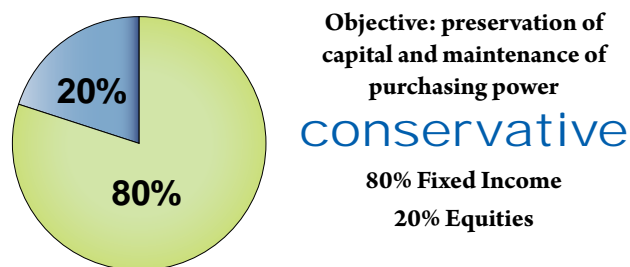
"East Texas Communities Foundation founders were some of the greatest champions for philanthropy in their day and had the vision to create a conduit to simplify charitable giving for others of like mind. The professional advisors of our community - attorneys, CPAs, and financial advisors - turn to East Texas Communities Foundation on a regular basis to help their clients realize their charitable goals - and to do so far more effectively than they otherwise could if not for staff's expertise in charitable giving. We are all the better for its presence in our community."

— Doug Bolles, CAP
Partner, WorthPointe Wealth Management

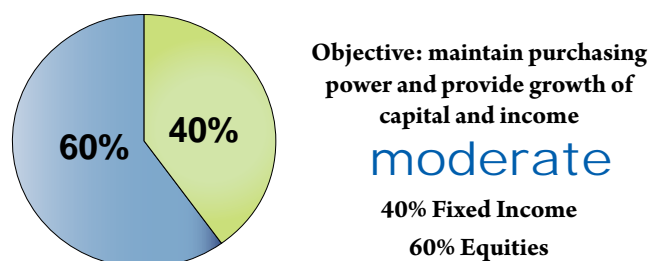
Investments

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.

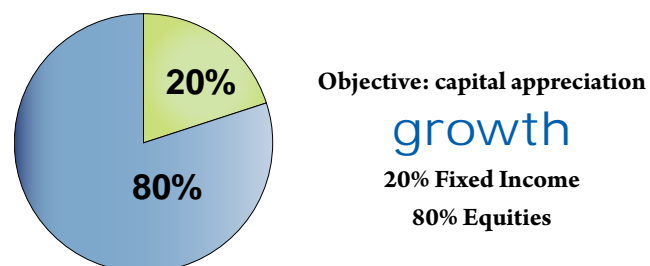
In order to meet the investment objectives of various charitable funds, donors can recommend one of six professionally-managed investment portfolios. Donors may select an actively-managed investment portfolio or a portfolio of passive index funds following one of three investment strategies as described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



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.



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.



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, CAP®
Partner, WorthPointe Wealth Management
- 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
- Richard Perryman, Retired Investment Advisor

Interested in recommending your trusted investment advisor?

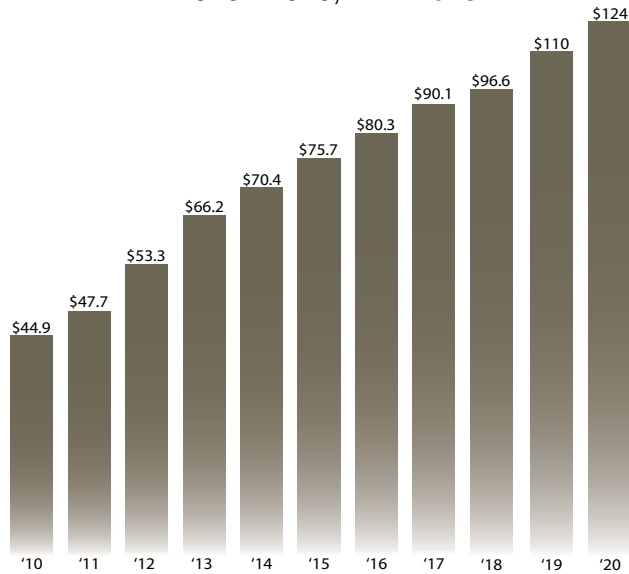
Donors creating funds with balances of \$500,000 or greater, may recommend the funds be invested with their trusted advisor. ETCF's Investment Committee works with outside investment advisors to comply with ETCF investment policies and help donors reach their charitable goals.

FINANCIAL HIGHLIGHTS

Year Ending December 31, 2020

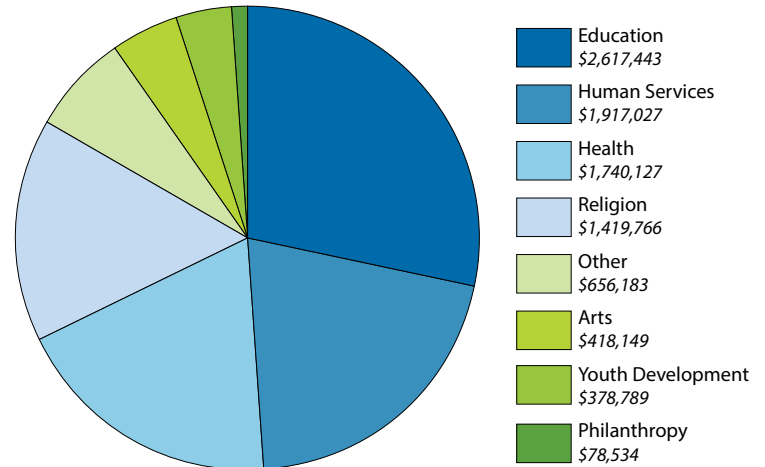
ASSETS

2010 - 2020, in millions



GRANTS

Total Grants \$9,226,022



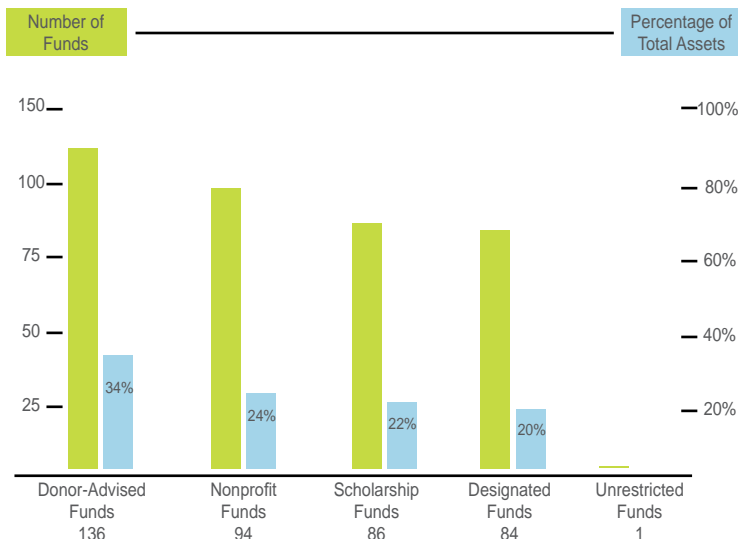
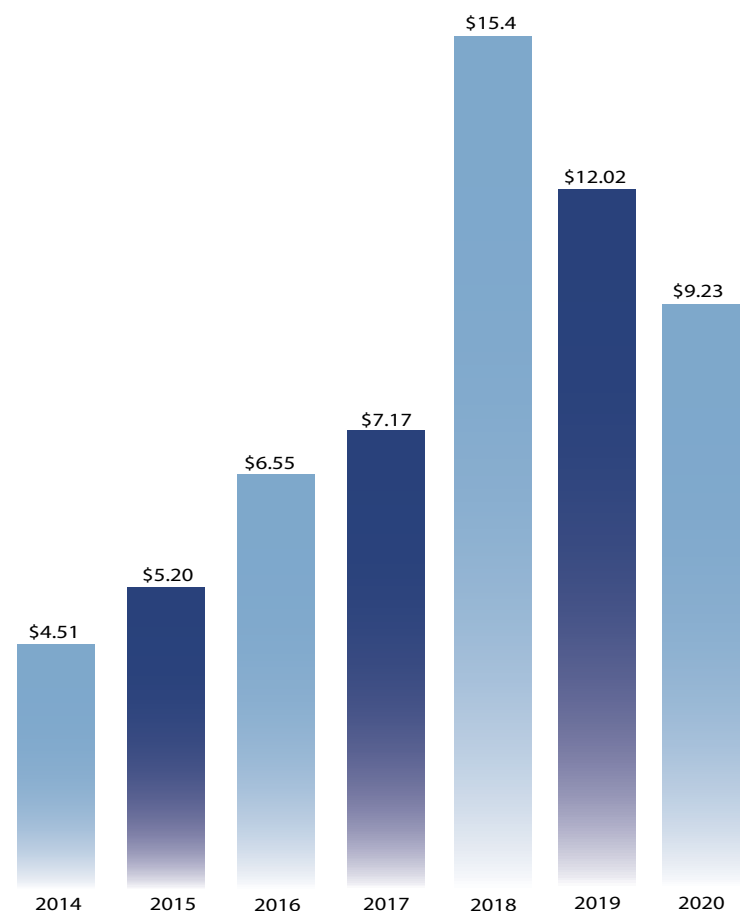
2020 Number of Funds by Type

Donor-Advised Funds	136
Nonprofit Funds.....	94
Scholarships.....	86
Designated Funds	84
Unrestricted	1

2020 total funds: 401

GRANTS BY YEAR

2014 - 2020, in millions



2021 ETCF EXECUTIVE COMMITTEE

Tiffany Kirgan

Financial Advisor/Partner
Johnson Financial Group

Board Chair

Shannon Glenney

Community Volunteer

Vice Chair - Governance Chair

Alan Roseman

Owner/Advisor
Roseman Wealth Advisors

Investment Chair

Richard Perryman

Retired Investment Advisor

Audit Chair

Barbara Bass

Benefits/Fundraising
Auctioneer

Grants Chair

Mark Hagan

Sr. Vice President- Wealth
Management, CFP/CAP
KNH Wealth Management Group
UBS Financial Services

Marketing Chair

Craig Adams

Attorney
Adams & Coker, P.C.

Policy Chair

Tony Morgan

Founding Partner
Gollob Morgan Peddy P.C.

Immediate Past Board Chair

2021 ETCF BOARD OF DIRECTORS & ADVISORY BOARD

Board of Directors

Marilyn Abegg Glass

Chairman of the Board
Abegg & Associates

Rick Allen

CPA/Shareholder
Henry & Peters, P.C.

Robert Bailes

CPA, Founder
Bailes & Company, P.C.

Doug Bolles

Partner
WorthPointe Wealth Management

Peter Boyd

Senior Executive Vice President
Southside Bank

Garnett Brookshire

President
Peoples Petroleum

Anthony Brooks

CEO, Azalea Orthopedic and
Sports Medicine

Dirk Coleman

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

Cindy Featherston-Shields

Owner, The Property Shoppe Group,
eXp Realty

Jay Ferguson

Headmaster
Grace Community School

Kimberly Fish

Freelance Writer &
Community Volunteer

Lee Gearheart

Partner
Gearheart + Gearheart, PLLC

Judith Guthrie

Retired Federal Magistrate Judge,
United States District Court of the
Eastern District of Texas

Edwin Holt

CEO
Holt Creative Group

John Jones

Chief Executive Officer
Jones Legacy Ventures

Gregory T. Kimmel

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

Dale Lunsford

President
LeTourneau University

David McWhorter

President of Gans & Smith
Insurance Agency

Gordon Northcutt

Vice President & Trust Officer
Vera Bank

Steve Roosth

President
Roosth Production Company

Kristen Seeber

Vice President of Community
Realtions, Hospice of East Texas

Scott Terry

Retired Investment Advisor

Mark Whatley

President & CEO
Burns Commercial Properties

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.

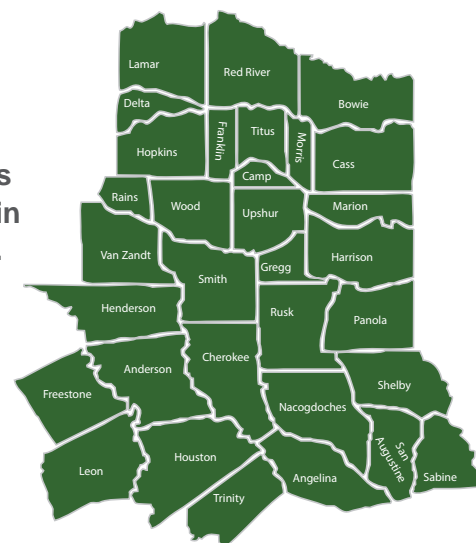
*Deceased

Advisory Board

W. Fred Smith, Jr.

Founder of
The Gathering

ETCF serves
32 counties in
East Texas.



2021 GREGG COUNTY ADVISORY COMMITTEE

Josh Black

US Title

Mark Boon

Attorney, Boon, Calk, Echols, Cole-
man & Goolsby Law

Dirk Coleman

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

Kimberly Fish

Freelance Writer &
Community Volunteer

Kristen Ishihara

Attorney, Ross & Sholmire

Dale Lunsford

President
LeTourneau University

Richard Manley

Community Leader

Jeff Moore

CPA, Henry & Peters, P.C.

Gordon Northcutt

Vice President & Trust Officer
Vera Bank

Mike Starr

Attorney, BCoghlan Crowson Law

Linda Thomas

Community Leader



315 N Broadway, Suite 210 Tyler, Texas 75702

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

www.etcf.org

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