Simplified Charitable Giving

Do Good Better.
Complex Assets Unlock Giving Potential

Knowledge is Power.
Scholarships Change Communities

THE BEST DAY TO GIVE!

www.ETCF.org
The Best Day to Give.
East Texas Giving Day provides opportunity for local nonprofits and donors to celebrate giving.

Do Good Better.
Non-cash assets can help you give more this year. Find out what to give to make a big impact.

17 Knowledge is Power.
Scholarships provide support for students across East Texas.

The Year in Review

04-11 Grant & Nonprofit Highlights
12 ETCF Funds Types
14-15 Donor-Advised Funds
16-17 Scholarships
18-19 Nonprofit Funds
20-21 Designated Funds
22 Comparisons Chart
23 Partial List of Funds
24-25 Complex Assets
26 Professional Advisors
27 Investments
28-29 Planned Giving
30 2021 Financials
31 Current Board of Directors

East Texas Communities Foundation supports your charitable goals by helping you create a giving strategy to maximize your impact today, tomorrow and forever.

www.ETCF.org
1-866-533 ETCF (3823)
Philanthropy builds community and changes lives. East Texas Communities Foundation supports philanthropy by offering simple ways for donors to achieve their charitable goals.

**2021 IMPACT**

**Total Grants**
- 2021
- $17.2 million

**Total Funds**
- 425

**Total Assets**
- December 31, 2021
- $134 million

Photos clockwise from top:
- Gregg County Advisory Committee members Kimberly Fish and Linda Thomas show support for nonprofits on East Texas Giving Day.
- Nakariah Turner, recipient of the Sammy Joe Calhoun High School Scholarship at Clarksville High School.
- Kyle Penney and Sidney Allen.
- Tiffany Kirgan and Kyle Penney present Keelan Erwin the Gladys and Thomas T.B. Stewart Scholarship.
- Kyle Penney presents a grant check to Family Promise Executive Director, Doris Ramaly and Rev. Dr. Bill Carroll.
Community Improvement: Through collective giving, the Women’s Fund of Smith County transforms the community by funding programs that enrich the lives of women and children in Smith County. Pictured left to right: Beth Filla, Stephanie East, Sherri McElvea, Holly McFarlin, Kristen Ishihara, Courtney Klepfer and Brandy Ziegler at the annual Power of the Purse luncheon.

Human Services: ETCF fund holders quickly responded to help repair damages at East Texas Crisis Center as a result of the winter storms. The shelter was forced to close temporarily due to electricity and water damage related to the storm. Crisis center employees worked with other organizations, such as the Salvation Army of Tyler, to provide a safe environment for those escaping abusive relationships during the closure.

*Picture courtesy of Tyler Paper.*
Education: Longview ISD Foundation was awarded a grant to their memorial scholarship fund in honor of lifelong Gregg County resident, LeGrande Northcutt. Northcutt was a 1954 graduate of Longview High School.

Human Services: Thanks to a grant from the Bunnie Schulz Memorial Fund, Starbrite Therapeutic Equestrian Center was able to purchase a new Kubota tractor. Starbrite provides equine-assisted activities & therapies for the physical and mental needs of disabled children, adults and veterans.

Arts & Culture: The Evans-Merrick Music Grants Fund awarded a grant to the East Texas Symphonic Band, in support of a free, public concert in Teague Park in Longview, Texas, on the Monday prior to Memorial Day.

Education: Tyler Day Nursery received a grant to provide professional development for teachers. Tyler Day Nursery is the oldest, licensed nonprofit child-care program in the state of Texas.
Twelve nonprofits serving Gregg, Nacogdoches, Rusk, Smith, and Upshur counties were awarded grants totaling $100,000 from the T.J. and LaVerne Plunkett Foundation held at East Texas Communities Foundation in Tyler, Texas.

“The Plunkett Foundation has a generous history of supporting East Texas charities,” said Kyle Penney, President of East Texas Communities Foundation. “We are honored to continue their work making grants to worthy nonprofits serving our neighbors in need.”

Boys and Girls Club of Rusk County received funding to assist with a new summer program aimed at helping students avoid losing ground academically during summer break.

“This grant could not have come at a better time,” said Peggy McAlister, Executive Director for the Boys and Girls Club of Rusk County. “Low income youth lose more than two months in reading achievement,” said McAlister. “Summer learning losses can stack up from year to year causing kids to get further and further behind. We will use funding from the Plunkett Foundation grant to implement Summer Brain Gain, a summer reading program with a new book presented each week, along with supporting activities that bring the book to life.”

The Boys and Girls Club of Rusk County provides safe facilities and enriching programs for all youth to help them develop the qualities needed to become responsible citizens. Last year, the Boys and Girls Club of Rusk County served approximately 400 students.

TJ. and LaVerne Plunkett Foundation grant recipients for 2021 are:

**Rusk County**
- Boys and Girls Club of Rusk County: implementation of summer Brain Gain
- Christian Women’s Job Corps of Rusk County: general operating support
- Sonshine Lighthouse Ministries: GED on-site tutoring, smoking and vaping cessation program and general operating support
- Keep Henderson Beautiful: addition of safety features to the playground at Lake Forest Park

**Gregg County**
- Texas Shakespeare Festival Foundation: Texas Shakespeare Festival Summer Season
- Family Promise of Longview: rent & utility assistance for families
- Salvation Army of Longview: for the Commodities Closet and Food Pantry

**Upshur County**
- Presbyterian Camps at Gilmont: respite for caregivers of family members with developmental disabilities

**Nacogdoches County**
- Boys & Girls Club of Deep East Texas: creation of the Torch Club
- Christian Women’s Job Corps of Nacogdoches County: general operating support

**Smith County**
- East Texas Food Bank: general operating support

Photos clockwise from top:
Tony and Sue Wooster and Kyle Penney.
Peggy McCallister, with the Boys and Girls Club of Rusk County and Kyle Penney.
Dana Durman, ETCF Program Officer and Buzz Fullen, Keep Henderson Beautiful.
Beth Filla and Ahnise Summers celebrate National Philanthropy Day hosted locally by the Association of Fundraising Professionals, East Texas Chapter.

ETCF Program Officer, Dana Durman is pictured with Troup Municipal Library Director, Melanie Brumit receiving a check from the Tyler Library Fund at ETCF.

Kay Latta, Laura Zorn, Dr. Paul Latta, Whitney Patterson, and Patrick Willis gather at ETCF’s annual Because of You reception.

ETCF board member, John Jones and wife, Lisa, at ETCF’s annual Because of You reception.

Kathryn Martinez, Beth Filla, the Honorable Judith K. Guthrie, and Barbara Bass at the Women in Tyler, Women Who Turned the Table luncheon. Judge Guthrie was recognized as the first ever recipient of the “Judith K. Guthrie Legacy of Service Award.”

Josefat Covarrubias was the recipient of the Earl Campbell Tyler Rose High School Scholarship. Pictured with Josefat are his parents, Maria and Victor Covarrubias.

Kyle Penney, Joyce Bufford and Betsy Brush Hahn discuss the vital role women play in philanthropy and family health, while filming a promotion for the University of Texas at Tyler, School of Medicine.

New Texas Sinfonia held a Fiddle Zoo for Kids at the First Presbyterian Church of Tyler. The free event encouraged kids to play a variety of string instruments under the supervision of professional musicians. The event received a grant from the Evans-Merrick Music Fund held at ETCF.
Growing Collaboration

Tool Elementary School kicked off the school year with a new teaching tool. A partnership between the Malakoff Independent School District and local Henderson County nonprofits launched the creation of an outdoor garden classroom focusing on the benefits of sustainability, community improvement and nutrition.

The outdoor classroom, named Miss Fran's Teaching Garden, was made possible through collaboration between Cedar Creek Garden Club, Tool Elementary School and the Community Food Pantry in Tool. Funding for the project was provided in part by a grant from the Edwin A. “Blue” and Janice Owen Miller Charitable Fund held at East Texas Communities Foundation in Tyler, Texas.

“Innovative projects like Miss Fran’s Teaching Garden would have been the exact type of project that the Millers would have supported in their lifetime,” said Kyle Penney, President of East Texas Communities Foundation (ETCF). “ETCF is pleased to be able to fulfill the Miller’s legacy by supporting this outdoor classroom project that will provide hands-on learning to the students and benefit the community for years to come.”

Brandi Sutton, Principal of Tool Elementary School, has always envisioned an outdoor learning space for her campus. “A garden had always been on my wish list,” said Sutton. “When I received the call from the Cedar Creek Garden Club, I knew this was the bridge needed to make my dream a reality.”

Debbie Bozeman-Zook, newly-elected President for the Cedar Creek Garden Club said lessons will line up with the curriculum teachers are already teaching. Specific topics will vary by grade level, with younger children learning about colors of the garden and counting plants. Older students will learn more math and science-based topics, such as how many plants will fit into a certain area and plant life-cycles.

Miss Fran’s Teaching Garden is named in honor of long-time Tool resident and community leader, Fran Sonka. Ms. Sonka retired to the Tool community in 1991 and went on to serve on the City Council for 17 years, two of those as mayor. After the opening of Tool Elementary School in 2007, Ms. Sonka made it a point to greet the students with a hug every morning as they entered the school. “I can’t say enough about the impact Fran has had on our students,” said Sutton. “Naming the garden in her honor is only fitting.”

Organizers plan for the garden to not only provide opportunities for the students, but the community itself. “Our goal is to harvest and distribute fresh produce for the food pantry to serve our most vulnerable in the community,” said Bozeman-Zook. “That’s when collaboration with the Community Food Pantry will play a big part in this partnership.”
Grants from the John Harris Community Fund were awarded to Boo’s Battle Support Fund, Shelby County Outreach Ministries, Inc., Shelby County Children’s Advocacy Center, CASA of Deep East Texas and East Texas Food Bank.

“Boo’s Battle Support Fund provides financial assistance to local individuals or families battling cancer,” said Judy Monroe, volunteer with Boo’s Battle. “Whatever the family needs – be it gas cards, groceries or rent – we will provide financial support to ease their burden.”

Boo’s Battle Support Fund helps on average 35 families a year with financial support. “In the past we have held fundraisers to raise money,” said Monroe. “With COVID, we have had little opportunity to raise funds but the need has not gone away. Receiving this grant from the Harris Fund will help families who are dealing with so much right now. It’s truly a blessing.”

“John Reagan Harris was a generous benefactor, giving both his time and his resources to many groups and worthy causes in and around the town of Center,” said Kyle Penney, President of ETCF. “The John Harris Community Fund was established to support worthy projects which benefit the Center, Texas community.”

Shelby County Nonprofits Receive Grants From Harris Fund

“Receiving this grant from the Harris Fund will help families who are dealing with so much right now. It’s truly a blessing.”

- Judy Monroe, Volunteer with Boo’s Battle Support Fund

John Reagan Harris was a generous benefactor, giving both his time and his resources to many groups and worthy causes in and around the town of Center,” said Kyle Penney, President of ETCF. “The John Harris Community Fund was established to support worthy projects which benefit the Center, Texas community.”
Charities in East Texas benefited from the generosity of more than 5,800 donors during East Texas Giving Day, the region’s dedicated day of giving to support local nonprofits.

The online fundraising effort began at 6:00 a.m. on Tuesday, April 27th, and ended at midnight. Donors contributed $2,810,647 to support the causes they care about in 32 East Texas counties.

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 from among 258 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. Bowie County charities led the charge with Texas A&M University-Texarkana receiving the most overall contributions with a total of $141,749, followed by Texarkana College Foundation raising $109,028 and Breckenridge Village of Tyler, based in Smith County rounding out the top 3 spot with $107,155.

Media sponsors around the region for East Texas Giving Day included: KYTX CBS19, KETK NBC 56, KFXK Fox 51, ArkLaTex.com NBC 6, KLTV ABC 7, KTRE ABC 9, Jack FM 106.5, KYKK 105.7, KVNE 89.5 and KGLY 93.1, Mix 107.7 and KOYN 93.9, KALK 97.7 and KSCN 96.9, KISS FM 92.7, KICKS 105.1, Townsquare Media, The Tyler Loop, Tyler Today Magazine, 4 States Living, Texarkana Today, Tyler Vault and M Roberts Digital. Media sponsors helped publicize giving day with online public service announcements and live broadcasts throughout the day.
Photos top to bottom:

Staff and volunteers at Bethesda Health Clinic embrace the fun of East Texas Giving Day.

East Texas Communities Foundation Board Chair, Tiffany Kirgan poses with fellow board member Peter Boyd on Giving Day.

ETCF hosted several Facebook Live events to promote giving and provide updates on Giving Day. Current Tyler Mayor, Don Warren and former mayor, Barbara Bass, shared a segment with Kyle Penney as they discussed the giving nature of East Texas residents. Jordan Sherrod with M. Roberts Media helped facilitate the Facebook Live events.
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.
East Texas Communities Foundation supports philanthropy by offering simple ways to achieve your charitable goals both now and into the future. Call 903.533.0208 to set up an appointment to learn more.
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.

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.
Anna Davis loves sitting on her front porch with her grandchildren.

“We enjoy the sounds of our neighborhood. The birds sing, cars drive by and neighbors wave. It is relaxing,” said Davis. “My home is my blessing.”

A blessing that she almost lost due to an electrical fire.

“We lost everything, mostly due to smoke damage.” said Davis. “It was hard to believe we could lose it all so fast.”

The Davis family lived for a short time in a hotel and then on and off with family in the area but when a family member was diagnosed with COVID, they had no other option but to move back into their fire damaged home.

“Our neighbor was gracious enough to allow us to run an extension cord from their home to ours to power a few items and we also used their water,” said Davis. “It was hard but we knew it was only a temporary fix. We prayed for someone to help us get our house back.”

Help did come in the form of the Critical Repair Program of Habitat for Humanity of Smith County. The program provides assistance to lower income East Texans through grants that pay for much needed repairs. The program helped the Davis family repair their homes electrical system, plumbing and water lines but the walls and ceilings remained unfinished.

Just before Christmas an anonymous donor at East Texas Communities Foundation stepped in to assist with the last of the repairs. “It felt good to connect the donor with this need,” said Beth Filla, Donor Relations specialist. “Donor-Advised funds are perfect in these kinds of situations because the money is there, already set aside for charitable purposes like this. Once the recommendation was issued, we were able to get a $10,000 grant out quickly to Habitat for the critical repairs program.”

Funds from the ETCF grant were used to replace sheetrock, paint walls, provide a handicapped accessible bathroom with walk-in shower, and screen in the front porch.

While sitting on her porch, Mrs. Davis reflected over the past year and the events that took place. She said that there were still a few things they wanted to make improvements on in the house but she couldn’t imagine how much better things were since the fire. When she thought about the donor that helped her family when they needed it most, Mrs. Davis said, “You are my brothers and sisters in Christ. I can never repay you, but I can say thank you.”

- Anna Davis, client of Habitat for Humanity of Smith County.
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.

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 recommend 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.
“Neither of my parents had the opportunity to attend school full-time. Being awarded the East Texas Estate Planning Council Scholarship from ETCF helped me be the first in my family to graduate high school and attend college.”

-Kalin Martinez 2020 graduate of Buffalo High School, Buffalo, TX. University of Texas, McCombs School of Business

Spring is Scholarship Season

East Texas Communities Foundation awarded $348,500 in scholarships to high school and college students across East Texas for the 2021-22 school year. Scholarship amounts range from $500-$5,000 per student, from 68 different scholarship funds at ETCF.

“East Texas Communities Foundation is honored to help these deserving students continue their education. It is our privilege to fulfill the charitable goals of the many individuals, organizations, and families who have made it possible,” said Kyle Penney, President of East Texas Communities Foundation. “Each year we are impressed with the quality of students applying for these funds. The donors who have invested in these students through the creation of scholarship funds have given a lasting gift to all East Texans.”

ETCF recognized 128 new recipients of scholarships and 56 renewing scholarship recipients. Over 1,200 applicants applied for available scholarships this year.
Establishing a Nonprofit Fund.

Organizations and individuals can establish a nonprofit fund to help provide essential funding to support their mission now and forever. Establishing a nonprofit fund can grow annual revenue for an organization while also providing reliable, consistent funding.

A nonprofit fund with ETCF allows the nonprofit organization to focus on building an endowment or an operational reserve, without the burdens of managing one.

The professionally managed fund remains fully accessible to the nonprofit based on their intentions for endowment or short term support.

Having an operating reserve set aside can help stabilize a nonprofit’s finances by providing a cushion against unexpected events, losses of income, large unbudgeted expenses, etc.

Nonprofit funds can be created by the nonprofit or initiated by a donor.

ETCF is equipped to handle a variety of gifts including publicly traded and closely held securities, real estate, life insurance, and other types of complex assets.

ETCF has the policies in place to accept the most complex assets, allowing nonprofit staff to remain focused on their mission.

Having a nonprofit fund frees the organization from the responsibility of actively managing investment portfolios and investment managers.

With more than $100 million in assets, investing with ETCF allows the fund to benefit from pooled investment opportunities.

Partnering with ETCF also gives a nonprofit access to planned giving strategies and support at no extra cost.

Our staff can provide educational content for staff and board on how to set-up and promote planned giving campaigns.

Our team can also be available to meet with nonprofit staff and donors of an organization to work on planned giving and other complex gift options.
Literacy Council of Tyler (LCOT) began in 1990 as an adult basic literacy program, but quickly expanded to offer English as a second language (ESL). Between 2000 and 2012, the board of LCOT created a trio of nonprofit funds to provide long-term and short-term stability for the organization.

"Having an endowment as well as a cash reserve fund, provides our organization and donors confidence about our future," said Whitney Patterson, Executive Director for the Literacy Council of Tyler. "By creating these funds, we feel blessed that future boards will have the flexibility to provide innovative programming while still meeting the annual fundraising goals of our organization."

"Having an endowment as well as a cash reserve fund provides our organization and donors confidence about our future.”

- Whitney Patterson
Executive Director of Literacy Council of Smith County

Founded in 2003, Bethesda Health Clinic’s mission is to provide affordable healthcare for uninsured working adults. In 2014, the Bethesda Health Clinic Endowment Fund was created at ETCF to support programs and services of the clinic.

"For over 18 years, Bethesda Health Clinic has served as an important safety net for uninsured members of our community," said Executive Director John English. "Gifts to our endowment ensure the clinic will remain a valuable medical resource for years to come and provide the most vulnerable with the opportunity to live a healthy, productive life.”
After 18 months of silence, the East Texas Symphony Orchestra assembled at Bergfeld Park in Tyler, Texas, to perform their first public concert since the COVID-19 pandemic began.

The Evans-Merrick Music Grant Fund, held at East Texas Communities Foundation (ETCF) in Tyler, Texas, awarded a grant to the East Texas Symphony Orchestra (ETSO) for 'Symphony in the Park'. The free concert featured patriotic music as well as popular pieces from Broadway shows and movies.

“We were very thankful for the Evans-Merrick grant which helped bring this project to fruition,” said Robin Hampton, Executive Director of the East Texas Symphony Orchestra. “This concert was the first time our musicians have been together on stage since February 2020. We wanted to hold an event celebrating the strength and resilience of East Texans after a most unprecedented year and a half.”

The event took place on the Centene Stage at Bergfeld Park with ETSO’s Music Director, Richard Lee leading the intimate group of musicians. Concertgoers stretched out on picnic blankets to enjoy the evening with friends and family.

ETSO Executive Director, Robin Hampton, said, “Our musicians were excited to be back on the stage and back under Richard’s direction. This concert is a gift to the community. A way to celebrate the joy of music and collective experiences that we have all missed due to the pandemic.”

The purpose of the Evans-Merrick Music Grant Fund is to support and encourage traditional or classical music activities that are offered free to the public across the East Texas region.

Evans-Merrick Music Grant recipients for 2021 include: LeTourneau University, for The Spring Masterworks Concert; Mount Vernon Music Association for a Children’s Concert featuring newly commissioned piece for string quartet; East Texas Music Teachers Association, to commission a composer and host a composer workshop; Longview Symphony, to support education and music appreciation in the community; and New Texas Sinfonia Fiddle Zoo for Kids.
Establishing a Designated Fund.

Designated funds provide opportunities for donors to “designate” the specific charity (or charities), field of interest, or programmatic area they wish to support. A designated fund may use a committee, advisor, distribution formula, or competitive grant process to make grant distributions. ETCF will work with you to define and set the parameters of the fund. Once the fund is active, you get to sit back, relax, and watch the good work being done. Your charitable giving will be done automatically.

ETCF staff walk donors through the process of creating and naming the Designated Fund. We work closely to define the parameters of the fund, including the charities supported, field of interest, geographic area, or other specific interest, so the fund will meet your charitable goals.

A Designated Fund can also be the beneficiary of a remainder interest from a Donor-Advised fund, securing a legacy of support for a period of time or in perpetuity.

With more than $100 million in assets, investing with ETCF allows a fund to leverage and benefit from pooled investment opportunities.

Designated funds can be created through a variety of contributions, such as cash, real estate, mineral interests, and retirement accounts.

ETCF offers a range of investment strategies managed by an outside firm and overseen by an investment committee.

If your fund balance is over $500,000, you can recommend a trusted wealth advisor to work with ETCF to manage the fund.

Designated funds are one of ETCF’s most flexible giving instruments.

ETCF staff will fulfill the granting guidelines of the fund that were established at the fund’s creation. ETCF will facilitate any necessary committee meetings, grant applications, etc., and ensure distributions are made per fund guidelines.

ETCF will also coordinate with the recipient nonprofits to receive reports and updates regarding how the funds were used.
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>Yes</td>
<td>Yes</td>
<td>Yes</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><strong>Primary Disadvantages</strong></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><strong>Primary Advantages</strong></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 ETF Funds

#### Donor-Advised Funds
- Adams Family Donor Advised Fund
- Sidney and Anna Lee Allen Charitable Fund
- Melinda and Dick Allen Charitable Fund
- Anderson-Valadiya Donor Advised Fund
- Jeff and Sissy Austin Donor Advised Fund
- Lance and Kandis Autry Charitable Fund
- Jeff and Jackie Badders Charitable Fund
- Bagby Family Charitable Fund
- Edgar and Lisa Barchuk Charitable Fund
- Barker Family Foundation
- Glenda Bendit Charitable Fund
- Barbara and Billy Bass Charitable Fund
- Lisa and David Beard Donor Advised Fund
- Beryl Berry Donor Advised Fund
- Carl and Evelyn Bowch Donor Advised Fund
- Thomas W. Bocock, MD Donor Advised Fund
- Marilyn Jo Binkman 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
- HFP Fund
- Lauren Buffle Donor Advised Fund
- Joyce Buffle Donor Advised Fund
- Steve and Penny Carlin Charitable Fund
- Dirk and Pam Coleman Charitable Fund
- Cordell Family Donor Advised Fund
- Betty Danielson Memorial Fund for Youth
- Suzanne Davis Donor Advised Fund
- Mary C. Decker Charitable Fund
- Deni Fund
- Dent Charitable Fund
- Dimond Family Charitable Fund
- Karleen Draper Donor Advised Fund
- Jimmy and Gal Evans Charitable Fund
- Dana and Pam Evans Charitable Fund
- John and Kevin Fullen Charitable Fund
- Gertrude Windsor Garden Club Fund
- Gerard Family Donor Funded Fund
- Emily and Gerald Gibson Fund
- Donis Evans Gifts Charitable Fund
- Jim and Leigh Gontimar Charitable Fund
- Dr. and Mrs. Charlie Gordon Donor Advised Fund
- Joyce and Zelick Greenberg Donor Advised Fund
- Fred and Ginger Haberle Charitable Fund
- Roy and Helen Halmark Fund
- Brian & Jan Hancock Donor Advised Fund
- Don and O'Mate Harvey Charitable Fund
- Tim Hayward Medical Lecture Fund
- Steve and June Hills Family Charitable Fund
- Presley C. and Virginia B. Hudson Donor Advised Fund
- Hurst Family Fund
- H.T. and Laura Hyde Charitable Fund
- Robert B. Irwin Foundation
- Jackson Family Charitable Fund
- Jasper Ventures Employee Match Program Fund
- Erin and Brent Jasper Charitable Fund
- Carrie Ann and Jason Yeary Charitable Fund
- Jasper Family Fund
- Jane E. and Les Campbell Charitable Fund
- Jon and Susan Jasper Charitable Fund
- Phil and Sharon Jenkins Charitable Fund
- John and Lisa Jones Charitable Fund
- Karen Faulkner Key Donor Advised Fund
- Elizabeth Faulkner Kienan Donor Advised Fund
- Richard and Susan Krier Charitable Fund
- Lowery Donor Advised Fund
- Rod and Meryl Matley Family Fund
- Jack and Glenda Mann Donor Advised Fund
- Matthew Family Charitable Fund
- Mauldin Family Donor Advised Fund
- McCook Family Giving Fund
- Michael and Fritter McNally Donor Advised Fund
- McShane Family Charitable Fund
- Vicki and Tony Morgan Charitable Fund
- Stacy and Reid Martin Family Charitable Fund
- F. William and Jo Martin Donor Advised Fund
- Nabale Charitable Fund
- Nichols Family Fund
- LaGrande and Cassandra Northcutt Donor Advised Fund
- Olma Smith "The Gift" Donor Advised Fund

#### Scholarships
- Art Excellence Scholarship Fund
- Partners in Arts Scholarship Fund
- Barbara Bass Community College Scholarship
- Brook Hill Founder’s Scholarship Fund
- David G. and Jacqueline M. Blaathefalske Scholarship
- Hugh P. Brown Memorial Scholarship
- Dr. Ibert H. Caldwell Scholarship Fund
- Sammy Joe Calhoun Fallows High School Scholarships
- Adam Carroll Scholarship Fund
- Citizens Bank/Penents Family Foundation State Employee's Children's Scholarship Fund
- Donald Scott Cooper Nursing Foundation
- Frances Cowan Gibson Fine Arts Scholarship
- F. Don Cawam Music & Performing Arts Scholarship
- Marita J. Christfeld Women in Finance Scholarship Fund
- Ophelia Horton Scholarship Fund
- Carl Campbell Troy High School Golf Scholarship
- Helen Ebert Scholarship Fund
- Roy & Betty Eubank Scholarship Fund
- East Texas Estate Planning Council Scholarship
- East Texas Geological Society Scholarship Fund
- Jim and Betty Eubanks Scholarships
- Alex Fleming Infinity Scholarship Fund
- Budi Florencio and Thomas C. Turner Scholarship Fund
- Corrute Westor Garden Club Scholarship
- Winifred K. George Scholarship Fund
- Juliette Lily's Amazing Girls Scholarship Fund
- Jean and Jim Guffey Texas Tech Scholarship
- Carrol and Casey Gurganus Scholarship Fund
- Edna Fau Fabelle Visual Arts Scholarship
- Richard B. and Mary Lou Hamilton Scholarship Fund
- Jackson Huse Scholarship Fund
- Raymond E. Jackson and Mia R. Rogers Memorial Scholarship Fund
- John Harris Scholarship Fund
- Joye Johnson Memorial Scholarship Fund
- Dalton and Betty Jones Scholarship Fund
- Kathy's Kids Scholarship Fund
- Tim King Memorial Scholarship Fund
- Vanessa Lemon's Charitable Fund
- Lauren Lewis Memorial Scholarship Fund
- Allen and Nancy Louislon Scholarship Fund
- Christopher Lyon Memorial Scholarship Fund
- Hubert "Hut" McElrath Scholarship Fund
- Mark W. Allen Memorial Scholarship Fund
- Maybell and Mert McMillan Scholarship Fund
- Sidney Moughton Scholarship Funds
- Frederick Michael Nalls Jr. Scholarship Fund
- Natural Gas Society of East Texas Scholarship Fund
- Gary Neel Memorial Scholarship Endowment
- Rhonda Perry Scholarship Fund
- Peace Officers and Firefighters Scholarship Fund
- Penny Porter Master Woodcraft Scholarship
- Glen and Vivian Prater Memorial Scholarship Fund
- Ben and Florene Ramsey Scholarship Fund
- Leslie Reed Memorial Scholarship Fund
- Rady Foundation Scholarship
- Retail Merchants Association Scholarship Fund
- Robinson Family Memorial Scholarship Fund
- Captain William Bannon Child Advocacy Society to the Sons of the American Revolution Scholarship Fund
- Smith County Baptist Minister Scholarship Fund
- Steeder Ty E Scholarships
- Glady's and Thomas T.B. Stewart Scholarship Funds
- The Gerald and Charlie Stoker Memorial Scholarship Fund
- Ben & Bettye Bitz Scholarship Fund
- Joe & Marguerite Davis Scholarship Fund
- J.T. Ivy Scholarship Fund
- Henry & Evelyn Smith Scholarship Fund
- Tadge & Bill O'Donnell Scholarship Fund
- Fast Action Music Scholarship
- Winnie Fink Woolerton Scholarship Fund
- Texas Rose Festival Scholarship Fund
- Tyler Citizens Police Academy Alumni Association Scholarship Fund
- Whitehouse Young Farmers Scholarship Fund
- Sherry A. Wilks MD Medical Scholarship Fund
- Randy Wimmon Memorial Firefighter Scholarship
- A.D and Mary Winston 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/*
A charitable gift of an interest in a closely held business requires careful planning. East Texas Communities Foundation can help you turn your business assets into community impact. ETCF supports philanthropy by offering simple ways to achieve your charitable goals both now and into the future.

Call 903.533.0208 to set up an appointment to learn more.
Giving to charity can be a very rewarding experience for donors, knowing that they are supporting the work of a nonprofit that is actively addressing needs in their community. Needs that may go unmet if they did not step in and help. Wanting to give a donation is only part of the process. Deciding what to give takes some additional thought.

With the help of a knowledgeable financial planner, a donor can select the most tax-efficient asset, and potentially give more than originally expected to support their favorite causes.

Many times a donor will give cash, use a credit card or write a personal check for their contribution to a charity. Depending on their personal financial situation, cash, while the easiest option for giving, could be the least beneficial financial resource to donate.

Gifts of non-cash assets have enormous potential for good because donors may be able to avoid significant capital gains taxes when making gifts of appreciated property. Research shows that over 93 percent of wealth is held in assets other than cash. Stocks, real estate, business interests, artwork and other non-cash assets hold immense potential for charitable giving.

When a person donates stock to a charity, they can make a gift at fair market value and avoid capital gains taxes, which would reduce their net proceeds of the stock if liquidated before making the gift. Gifts of appreciated stock can be up to 37 percent more tax-efficient than cash, depending on your tax bracket. When you donate stocks directly to a non-profit, neither you nor the charity will have to pay capital gains tax on the investments.

With the help of a knowledgeable financial planner, a donor can select the most tax-efficient asset, and potentially give more than originally expected to support their favorite causes.

Donors may have other non-cash assets in their portfolios that could also benefit from efficient tax planning. Non-cash assets such as real estate, privately held business interests, mineral interests, or tangible personal property like an antique automobile may provide excellent opportunities for tax-efficient charitable gifts.

Donating appreciated assets into a Donor-Advised Fund at East Texas Communities Foundation is a great way to receive a fair market value tax deduction and avoid capital gains taxes when the asset is liquidated. The cash proceeds are then available for the donor to recommend grants to public charities over time. The fund can also be invested and potentially experience additional tax-free growth while waiting to be granted to charities.

Through the use of charitable planning strategies, donors may be able to unlock some of an assets appreciated value, and significantly reduce capital gains taxes while benefiting their favorite charities. To learn more about donating non-cash assets and the charitable impact you can make, give us a call at 903-533-0208.
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 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 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. We are all the better for its presence in our community.”

— Doug Bolles, CAP
Partner, WorthPointe Wealth Management
Investments

East Texas Communities Foundation maintains several 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 the investment strategies described below.

**Objective: capital appreciation growth**

- 20% Fixed Income
- 80% Equities

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

**Objective: preservation of capital and maintenance of purchasing power**

- 20% Fixed Income
- 80% Equities

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

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

- 40% Fixed Income
- 60% Equities

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

**Objective: capital appreciation growth**

- 20% Fixed Income
- 80% Equities

ETCF’s 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:

- Scott Terry, Retired Investment Advisor, Investment Chair
- Alan Roseman, CPA, Roseman Wealth Advisors
- 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
- 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.
Charitable gift planning, also called estate planning, or planned giving, allows you to support your favorite nonprofit(s) during your lifetime and beyond. Planned giving sometimes has a taboo reputation because it evokes images of death, dying or diverting assets from heirs. However, planning how you want to distribute your estate is a wonderful time to reflect on your life accomplishments, values, and the impact you want to have on your community and generations to come.

Within the next 10 years, it is projected that East Texans will transfer over $21 billion in assets between generations. Much of this wealth currently resides in residential homes and farms, closely-held family businesses and other appreciated assets - some of which may be heavily taxed when passed to the next generation.

A planned charitable gift, as part of an overall estate plan crafted by a trusted advisor, takes into account your needs and those of your loved ones, as well as your important charitable interests. Below are the most frequently used planned gifts:

**Bequest by Will or Trust**

The simplest way to make a lasting gift to the causes that are most important to you is to make a bequest through your will or trust. By simply including information in your estate planning documents, you can easily establish a charitable fund (or add to an existing fund) at East Texas Communities Foundation (ETCF) that will carry out your charitable intentions. The bequest can be for a specific dollar amount, a percentage of your estate, or specific assets.

**Retirement Accounts**

Naming ETCF as a beneficiary of your retirement assets, such as an IRA, 401(k), or 403(b), can reduce or eliminate taxes for heirs and make a significant impact on the community and your favorite causes and organizations.

**Life Insurance**

Life Insurance provides one of the easiest ways to leave a legacy by simply designating ETCF as the beneficiary. Donations of life insurance offer an effective way to meet your philanthropic goals without affecting other personal assets you intend for heirs to receive. As a bonus, they may allow you to make a much larger gift than what you could have made during your lifetime.

No matter your estate size or tax situation, ETCF is here to work with you and your professional advisors to create simple and effective ways to ensure continued support for the causes and organizations that you care about.
Edwin A. “Blue” and Janice Owen Miller Charitable Fund was established at East Texas Communities Foundation to provide annual grants to support Henderson County charities. The Miller’s generosity and foresight resulted in the creation of an endowed fund which makes annual grants of over $100,000.

Starting a fund is SIMPLE and anyone can do it. You don’t have to be a millionaire. You can create a charitable fund that puts your resources to great use LOCALLY, for the causes you CARE ABOUT MOST. Learn more by contacting ETCF, 903.533.0208.
FINANCIAL HIGHLIGHTS
Year Ending December 31, 2021

ASSETS
2011 - 2021, in millions

GRANTS
Total Grants $17,161,447

2021 Number of Funds by Type

Donor-Advised Funds .............. 152
Nonprofit Funds ...................... 93
Scholarships .......................... 89
Designated Funds .................... 90
Unrestricted ........................... 1
2021 total funds: 425

GRANTS BY YEAR
2015 - 2021, in millions

$5.20 $6.55 $7.17 $15.4 $12.02 $9.23 $17.2

Number of Funds

Percentage of Total Assets

Education
Health
Religion
Human Services
Miscellaneous
Youth Development
Arts & Culture
Philanthropy
Health
Religion
Human Services
Miscellaneous
Youth Development
Arts & Culture
Philanthropy

30
CURRENT ETCF EXECUTIVE COMMITTEE

Tiffany Kirgan
Financial Advisor/Partner
Johnson Financial Group

Board Chair

Shannon Glenney
Community Volunteer

Vice Chair - Governance Chair

Richard Perryman
Retired Investment Advisor

Audit Chair

John Jones
Chief Executive Officer
Jones Legacy Ventures

Treasurer

Scott Terry
Retired Investment Advisor

Investment Chair

Gordon Northcutt
Vice President & Trust Officer

Vera Bank
Secretary

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

Tony Morgan
Founding Partner

Gollob Morgan Peddy P.C
Immediate Past Board Chair

CURRENT ETCF BOARD OF DIRECTORS & ADVISORY BOARD

Board of Directors

Craig Adams
Attorney, Adams & Coker, P.C.

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

Kris Gusa
CPA / Partner, Gollob Morgan Peddy

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

Edwin Holt
CEO, Holt Creative Group

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

Dale Lunsford
President, LeTourneau University

David McWhorter
President, Gans & Smith Insurance Agency

Jeff Moore
CPA / Shareholder, Henry & Peters, P.C.

Steve Roosth
President, Roosth Production Company

Alan Roseman
CPA / CFP / CAP/ Owner, Roseman Wealth Advisors

Lonny Uzzell
Senior Executive Vice President, Southside Bank

Mark Whatley
President & CEO, Bums Commercial Properties

W. Fred Smith, Jr.
Founder of The Gathering

CURRENT ETCF COUNTY ADVISORY COMMITTEE

Josh Black
Owner, US Title Company, Inc.

Mark Boon
Attorney, Boon, Calk, Echols, Coleman & 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

Karen Partee
EVP Chief Marketing Officer, Texas Bank and Trust

Heather Sanders
CPA, Henry & Peters, P.C.

Day Shelmire
Director, UT Tyler- Longview Small Business Development Center

Mike Starr
Attorney, Coghlan Crowson Law

Linda Thomas
Community Leader

ETCF serves 32 counties in East Texas.

Etcf serves 32 counties in East Texas.

*Deceased
The power of COMMUNITY starts with generous PEOPLE.

For more than thirty years, the people of East Texas have trusted East Texas Communities Foundation to help them reach their philanthropic goals.

Whether your love of education leads to the creation of a scholarship, your support of a local charity inspires the creation of an endowment or you wish to make donations to a variety of nonprofits from a Donor-Advised Fund, East Texas Communities Foundation can support you by offering simple, tax-smart ways to achieve your charitable goals.

315 N Broadway, Suite 210  Tyler, Texas 75702  903-533-0208  www.etcf.org