

# Simplified Charitable Giving

Do Good  
Better.

Complex Assets

Unlock Giving Potential

**THE BEST  
DAY TO  
GIVE!**

**Knowledge  
is Power.**

Scholarships Change  
Communities



[www.ETCF.org](http://www.ETCF.org)

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## Simplified Charitable Giving

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



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# 2021 IMPACT

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## 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.



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



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 McElyea, 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.*







Clockwise from top: 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.





## Plunkett Foundation Awards Grants to Twelve East Texas Nonprofits

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 McAllister, Executive Director for the Boys and Girls Club of Rusk County. "Low income youth lose more than two months in reading achievement," said McAllister. "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.

T.J. 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 McAllister, with the Boys and Girls Club of Rusk County and Kyle Penney.

Dana Durman, ETCF Program Officer and Buzz Fullen, Keep Henderson Beautiful.

Photos , top to bottom:

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."



Photos top to bottom:

The gardens on the campus of Tool Elementary School have provided a bountiful first year with over 500 pounds of food harvested and donated to the Community Food Pantry in Tool.

Fran Sonka, longtime Tool, Texas, resident and garden namesake, was honored at the garden opening dedication ceremony.

Tool Elementary School students learn about seed germination and soil preparation.







Photos left to right:

**Family that received support from Boo's Battle Support Fund.**

**ETCF Program Officer, Dana Durman presents a grant check to representatives from Boo's Battle Support Fund.**

**Boo's Battle Support Fund was founded in memory of Brandi 'Boo' Mills who lost her battle with metastatic breast cancer in 2017.**

# Shelby County Nonprofits Receive Grants From Harris Fund

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."

**"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."

ETCF staff distributed yard signs to participating nonprofits during a drive-thru sign pickup.



# The Best Day to Give.

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.

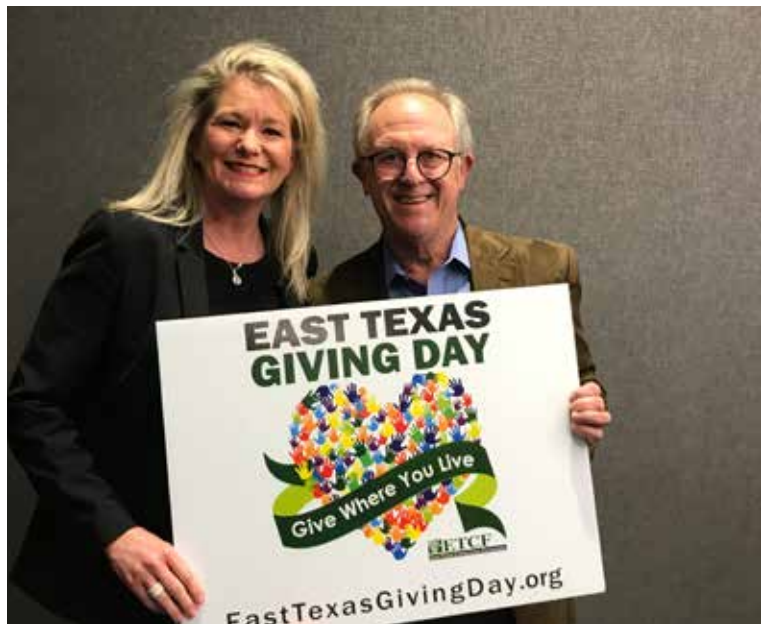
During East Texas Giving Day, nonprofit organizations encouraged their donors and the public to make charitable donations online at [www.EastTexasGivingDay.org](http://www.EastTexasGivingDay.org). Donors could choose from among 258 participating charities, and make donations starting at just \$10. Throughout 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 contri-

butions 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, KYKX 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.



# THE BEST WAY to predict THE FUTURE IS TO Create IT

Get started today  
with a fund at...



[www.ETCF.org](http://www.ETCF.org)

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.



Donor-Advised Funds



Nonprofit Funds



Scholarship Funds



Designated Funds

# 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 trade 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.





Photos top to bottom:

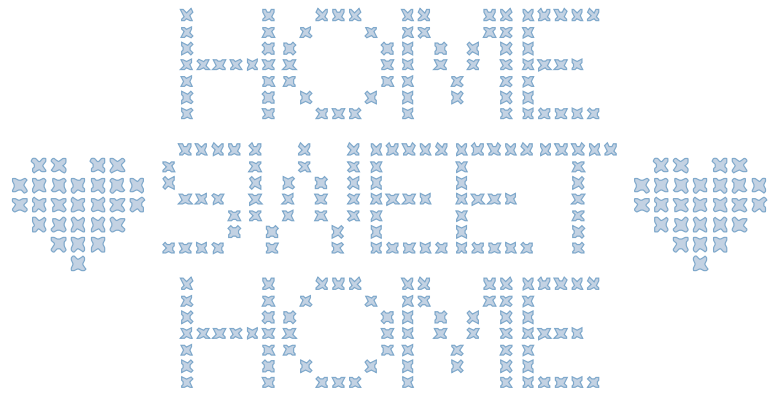
Anna Davis, home owner whose home was ravaged by an electrical fire.

The Davis home in Palestine, Texas prior to being repaired as part of Habitat for Humanity of Smith County's critical repairs program.

Newly remodeled handicap accessible bathroom inside the Davis home.

**"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.*



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."

# 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.

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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 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.

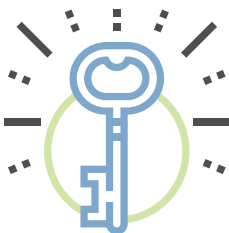
Organizations and individuals can establish a nonprofit fund to help provide essential funding to support their mission now and – *forever*. Establishing a nonprofit fund can grow annual revenue for an organization while also providing reliable, consistent funding.



Establish a Nonprofit Fund



Professionally Managed Investment



Planned Giving Resources

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."

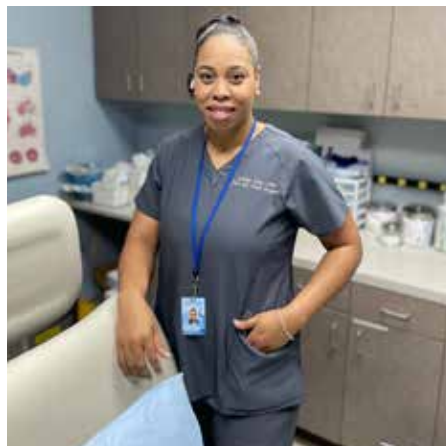
**" Having an endowment as well as a cash reserve fund provides our organization and donors confidence about our future."**

- 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."







Photos top to bottom:

Musicians perform at ETSO Symphony in the Park, held in Tyler, Texas, in early September 2021.

ETSO's music director, Richard Lee, leads the musicians in a classical piece.

ETSO musicians gather to perform at their first public concert since the pandemic began in 2020. Pictures courtesy of Efrain Sain.

# THE SOUND OF MUSIC

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.

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  
Sidney and Anna Lee Allen Charitable Fund  
Melinda and Rick Allen Charitable Fund  
Anderson-Vukelja Donor Advised Fund  
Jeff and Sissy Austin Donor Advised Fund  
Lance and Kandis Autrey Charitable Fund  
Jeff and Jackie Badders Charitable Fund  
Bagot Family Charitable Fund  
Edgar and Lisa Baker Charitable Fund  
Barker Family Foundation  
Glenda Barrett Charitable Fund  
Barbara and Billy Bass Charitable Fund  
Lisa and David Beaird Donor Advised Fund  
Beryl Berry Donor Advised Fund  
Carl and Evelyn Bochow Donor Advised Fund  
Thomas W. Bochow, MD Donor Advised Fund  
Marilyn Joan Brinkman Donor Advised Fund  
Brad and Ann Brookshire Donor Advised Fund  
Tim and Michelle Brookshire Family Fund  
Brown Family Donor Advised Fund  
Frank J. Budde and Marilyn Budde Fund  
HPP Fund  
Lauren Buford Donor Advised Fund  
Joyce Buford Donor Advised Fund  
Steve and Penny Carille Charitable Fund  
Dirk and Patti Coleman Charitable Fund  
Cordell Family Donor Advised Fund  
Betty Danielson Memorial Fund for Youth  
Suzanne Hunt Davis Donor Advised Fund  
Mary C. Decker Charitable Fund  
Denarii Fund  
Dent Charitable Fund  
Dimond Family Charitable Fund  
Karleen Draper Donor Advised Fund  
Jimmy and Gail Evans Charitable Fund  
Larry and Dana Fleming Charitable Fund  
Johnna and Kevin Fullen Charitable Fund  
Gertrude Windsor Garden Club Fund  
Gerard Family Donor Advised Fund  
Emily and Gerald Gibson Fund  
Doris Evans Gillis Charitable Fund  
Jim and Leigh Gomillion Charitable Fund  
Dr. and Mrs. Charles Gordon Donor Advised Fund  
Joyce and Zelick Greenberg Donor Advised Fund  
Fred and Ginger Haberle Charitable Fund  
Roy and Helen Hallmark Fund  
Brian & Jan Hancock Donor Advised Fund  
Don and O'Marie Harvey Charitable Fund  
Tim Hayward Medical Lecture Fund  
Steve and June Hillis 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 Yearly 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 Kirwan Donor Advised Fund  
Richard and Susan Knarr Charitable Fund  
Lowery Donor Advised Fund  
Rod and Merle Mabry Family Charitable Fund  
Jack and Glenda Mann Donor Advised Fund  
Matthews Family Charitable Fund  
Mauldin Family Donor Advised Fund  
McCook Family Giving Fund  
Michael and Fritter McNally Donor Advised Fund  
McSwane Family Charitable Fund  
Vicki and Tony Morgan Charitable Fund  
Stacy and Reid Martin Family Charitable Fund  
F. William and Mary Jo Martin Donor Advised Fund  
Niblack Charitable Fund  
Nichols Family Fund  
LeGrande and Cassandra Northcutt Donor Advised Fund  
Olivia Smith "For Good" Donor Advised Fund

Louis and Peaches Owen Donor Advised Fund  
P&G Donor Advised Fund  
Julie and Terry Pace Charitable Fund  
Pangburn Charitable Fund  
Larry and Rhonda Parker Charitable Fund  
Nancy & Robert Patterson Charitable Fund  
Texas Pioneer Foundation Charitable Fund  
William Pirtle Donor Advised Fund  
Rex and Janice Pritchard Charitable Fund  
Putman Family Charitable Fund  
Raabe Family Charitable Fund  
Ramey Family Fund  
Riehm Family Fund  
Riestenberg Family Charitable Fund  
Cynthia and Whit Ritter Donor Advised Fund  
Meg and Dan Robertson Charitable Fund  
Ken and Joyce Roddy Donor Advised Fund  
Rick and Jane Rogers Charitable Fund  
John and Carol Ann Rowland Charitable Fund  
Sam Roosth Foundation Fund  
Scholtes Family Charitable Fund  
Bunnie Schulz Memorial Fund  
Gail and Roy Sloan Jr. Charitable Giving Fund  
Fred and Carol Smith Family Donor Advised Fund  
Pam and Thomas Smith Donor Advised Fund  
Sneed Family Charitable Fund  
Stephens Family Fund  
Paul and Carla Szafran Charitable Fund  
Summers Foundation  
T.L.L. Temple Foundation Community Fund  
Tokoph Family Charitable Fund  
Ashley Prothro Trant Charitable Fund  
Justin Paul Walker Fund  
Harry and Gail Wallace Donor Advised Fund  
Cecil and Bernie Ward Family Donor Advised Fund  
Amy and Tom Woldert Donor Advised Fund  
Kim and Greg Wright Charitable Fund

### Designated Funds

American Freedom Museum Designated Fund  
Baxter Family Charitable Fund  
Brownsboro ISD Education Foundation  
Budde Family Designated Fund  
Burt and Nancy Marans Charitable Fund  
Carolyn F. Hyman Fund  
Choir School of East Texas Scholarship Fund  
City of Tyler Park Foundation  
Cloptin-Honc Family Fund  
Connie Wakefield Fund  
D. Coulter Templeton Fund  
Dennis and Terry Darryl Temple Beth El Donor Designated Fund  
Edwin A. "Blue" and Janice Owen Miller Charitable Fund  
Evans-Merrick Music Grants Fund  
Gideon's Restoration Camp Fund  
Greater Longview United Way Reserve Fund  
Harris Community Fund at ETCF Support Foundation  
Impact Van Zandt Fund  
Janette L. Collard Faith Baptist Church Designated Fund  
John Harris Community Fund  
John Wingate Truitt Log Cabin Fund  
Judge Carole Clark Trauma-Informed Training Fund  
Luther's Children Educational Fund  
Macy Chenevert Memorial Fund for Courageous Youth  
Mrs. AD Francis Endowment Fund  
Nacogdoches HOPE Designated Fund  
Northeast Texas Public Health District Fund  
Oil Patch Benevolence Fund  
Palestine University Academy Fund  
Paulette Duncan Charitable Fund  
R.F. and Jessie Shaw Fund  
Robert Eric Farmer Memorial Fund  
Rogers-Jackson Pet-A-Palooza Fund  
Roy & Betty Erickson Charitable Fund for Nursing  
Smith County Bar Foundation Designated Fund  
Smith County Disaster Relief Fund  
T.J. and LaVerne Plunkett Foundation  
The Bozman Family Fund  
Tributary Retreat Center Donor Designated Fund  
Tyler Area Healthcare Workers Support Fund  
Tyler Biking/Hiking Trails Fund  
Tyler Library Foundation Fund  
UT Tyler Palestine Campus Designated Fund  
Winnsboro Community Resource Center Designated Fund

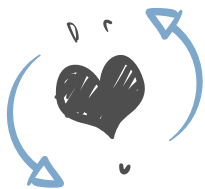
### Nonprofit Funds\*

American Freedom Museum Endowment Fund  
Alzheimer's Alliance of NE Texas, Inc. Endowment Fund  
The ARC of Smith County Endowment Fund  
C.C. and Brenda Baker Endowment for PATH  
Bethesda Health Clinic Endowment Fund  
A. M. and Lillian Brown Memorial Fund  
Cancer Foundation for Life Endowment Fund  
Children's Village Endowment Fund  
The Children's Park Endowment Fund  
Choir School of East Texas Endowment Fund  
Camp Tyler Outdoor School Endowment Fund  
Discovery Science Place Endowment Fund  
Edgewood Heritage Park Permanent Endowment  
East Texas Crisis Center, Inc. Endowment Fund  
East Texas Symphony Orchestra Endowment Fund  
East Texas Veterans Community Council Board Designated Fund  
John Evans Endowment for the Benefit of the East Texas Symphony Orchestra Association  
First Baptist Downtown Missions Ventures Endowment Fund  
Arnold T. Sikes Memorial Endowment for the First Tee of Greater Tyler  
Greater Longview United Way Endowment Fund  
Habitat For Humanity Of Smith County, Texas Endowment Fund  
Helen Graham Endowment  
Historic Tyler, Inc. Endowment Fund  
Hospice of East Texas Endowment Fund  
Heart of Tyler Endowment Fund  
Ben E. Jarvis Endowment Fund  
Junior League of Tyler Beverly Beaird Scholarship Endowment  
Lindale ISD Education Foundation Endowment Fund  
Lindsey Police and Firemen's Endowment Fund  
Literacy Council of Tyler Funds  
Longview Faithful Shepherd Foundation  
Meals on Wheels Endowment Fund  
The Mentoring Alliance Endowment Fund  
Martin Family Fund for the United Way of Tyler/Smith County  
Nacogdoches Area United Way Endowment Fund  
New Creation Foundation Endowment  
Newgate Mission Endowment Fund  
PATH Endowment Fund  
Ritter-Beaird Endowment Fund for East Texas Crisis Center  
Jerald B Sanford Gregg County Animal Shelter Endowment  
Tyler/Smith County Juvenile Attention Center  
Smith County Bar Foundation Endowment Fund  
Mary John Spence Endowment  
Bill R. Swetmon Educational Endowment Fund  
Mr. & Mrs. Bob Herd Fund  
The Texas Chest Foundation Fund  
Flanagan Nursing Scholarship Fund  
Genecov Memorial Fund  
McCary Heart Endowment Fund  
Hilman O. McKenzie Fund  
Isadore Roosth Fund  
Whitt Memorial Scholarship Fund  
Tyler Civic Theatre Endowment Fund  
Therapet Endowment Fund  
Tab and Bonnie Beall Tyler ISD Foundation Endowment  
Tyler ISD Foundation Endowment Fund  
John L. and Mary M. Tracy Endowment Funds  
John Wingate Truitt Log Cabin Endowment Fund  
Trinity School of Texas Unrestricted Endowment  
Tyler Day Nursery Endowment  
Tyler Rotary Foundation Endowment Fund  
United Way of Tyler/Smith County Fund  
Winnsboro Center for the Arts Endowment  
Band of Angels Memorial Scholarship  
Carolyn and J.D. Jones Agricultural Endowment Fund  
Thurma Rhoades Girls Athletic Scholarship Endowment  
Anna Wegener Memorial Camp Scholarship  
Windridge Therapeutic Equestrian Center of East Texas Endowment Fund  
Women's Fund of Smith County Funds

### Scholarship Funds

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



*work*  
**— HARD —**

*give*  
**BIG**



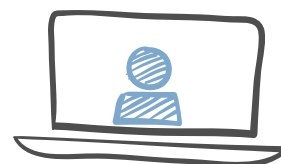
make giving your business  
by creating a fund at...



[www.ETCF.org](http://www.ETCF.org)

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.





# Gifts With Great Appreciation

*Considering a charitable contribution this year?*

*Gifts of non-cash assets may prove to be the most efficient giving solution.*

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.



# 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.

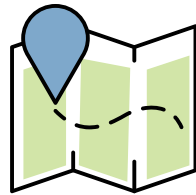
We can help you and your clients:



Identify charitable giving interests and goals.



Match 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, Jeremy Gregg with Arabella Advisors and ETCF board member, Doug Bolles at the East Texas Estate Planning Council lunch.

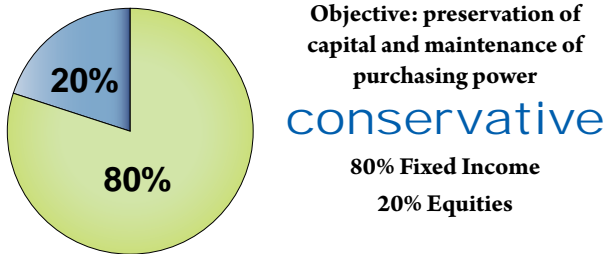
*"East Texas Communities Foundation founders were some of the greatest champions for philanthropy in their day and had the vision to create a conduit to simplify charitable giving for others of like mind. The professional advisors of our community - attorneys, CPAs, and financial advisors - turn to East 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

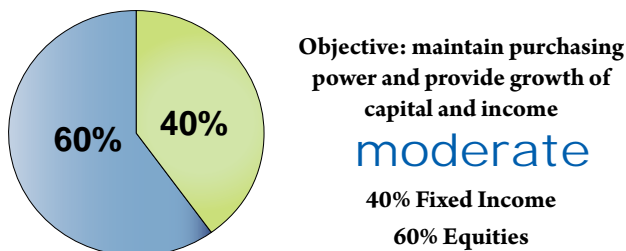
# Investments

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.

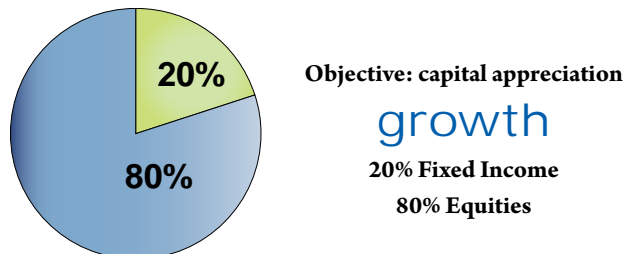
In order to meet the investment objectives of various charitable funds, donors can recommend one of six professionally-managed investment portfolios. Donors may select an actively-managed investment portfolio or a portfolio of passive index funds following one of the investment strategies described below.



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.



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.

# Tomorrow's Gift, Planned Today.

*Charitable gift planning, with the help of an advisor, allows you to customize the impact you will have on the future, while limiting tax-burdens on heirs.*

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.



a couple creates a fund



that benefits nonprofits in a geographical region



individuals will forever be impacted by their generosity



## 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.



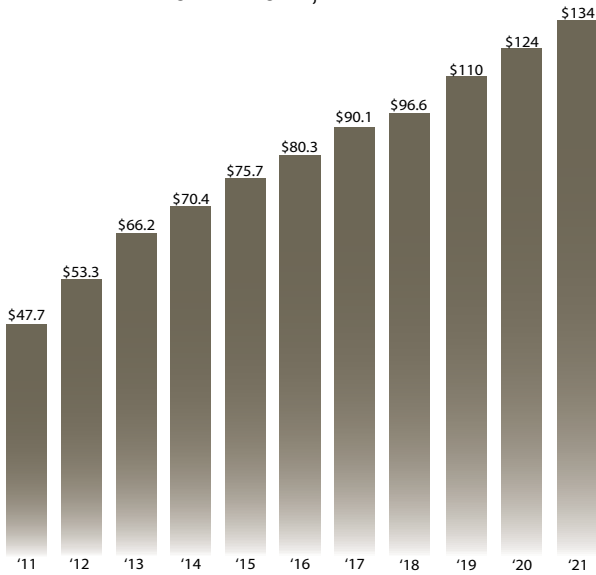
[www.ETCF.org](http://www.ETCF.org)

# FINANCIAL HIGHLIGHTS

Year Ending December 31, 2021

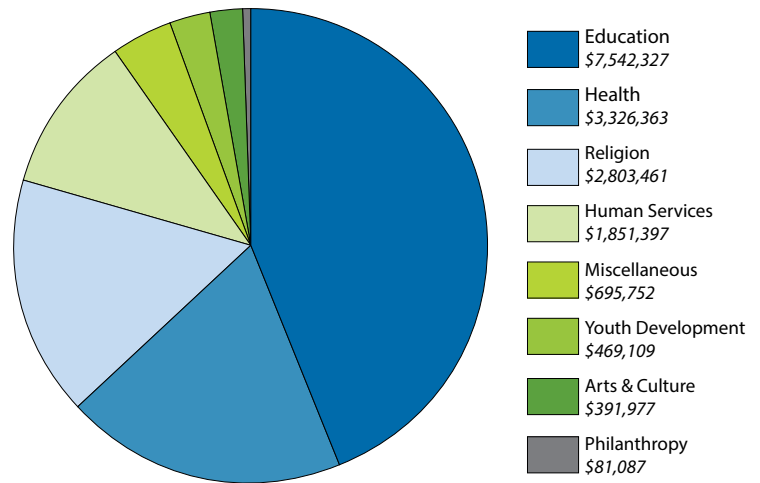
## ASSETS

2011 - 2021, in millions



## GRANTS

Total Grants \$17,161,447



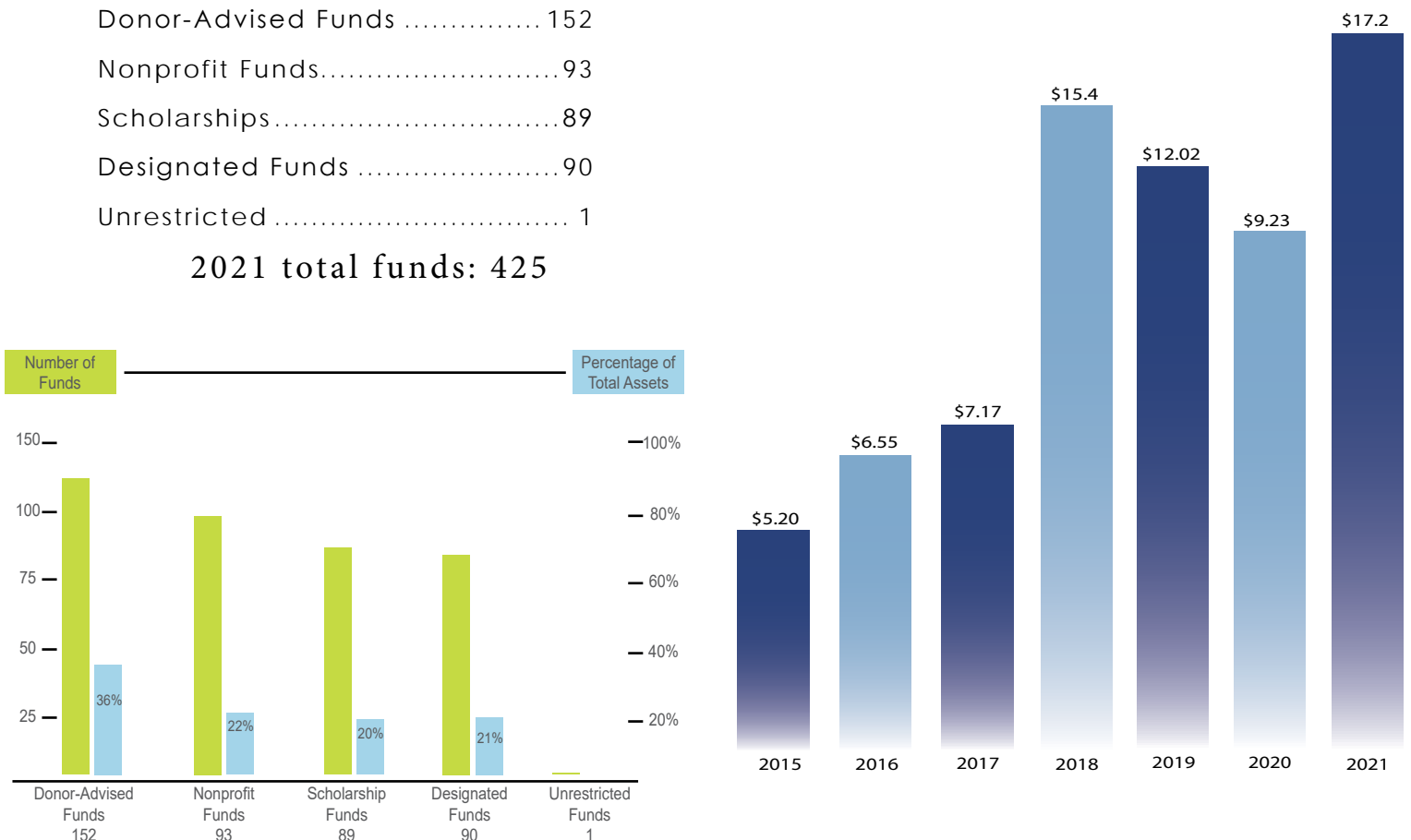
## 2021 Number of Funds by Type

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



# 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**

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United States District Court of the  
Eastern District of Texas

**Edwin Holt**

CEO,  
Holt Creative Group

**Gregory T. Kimmel**

Attorney, Partner,  
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**Dale Lunsford**

President,  
LeTourneau University

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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,  
Burns Commercial Properties

**Advisory Board****W. Fred Smith, Jr.**

Founder of  
The Gathering

**Emeritus Board****Allen Burt**

Allen M. Burt Financial Services

**F. William Martin**

Retired Civic Leader

**H.T. Smith**

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**A.W. "Dub" Riter, Jr.\***

Riter Management Co., L.C.

\*Deceased

ETCF serves  
32 counties in  
East Texas.



## CURRENT GREGG COUNTY ADVISORY COMMITTEE

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Owner, US Title Comapny, Inc.

**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

**Karen Partee**

EVP Chief Marketing Officer,  
Texas Bank and Trust

**Heather Sanders**

CPA, Henry & Peters, P.C.

**Day Shelmire**

Director, UT Tyler- Longview Small  
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**Mike Starr**

Attorney, Coghlan Crowson Law

**Linda Thomas**

Community Leader





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