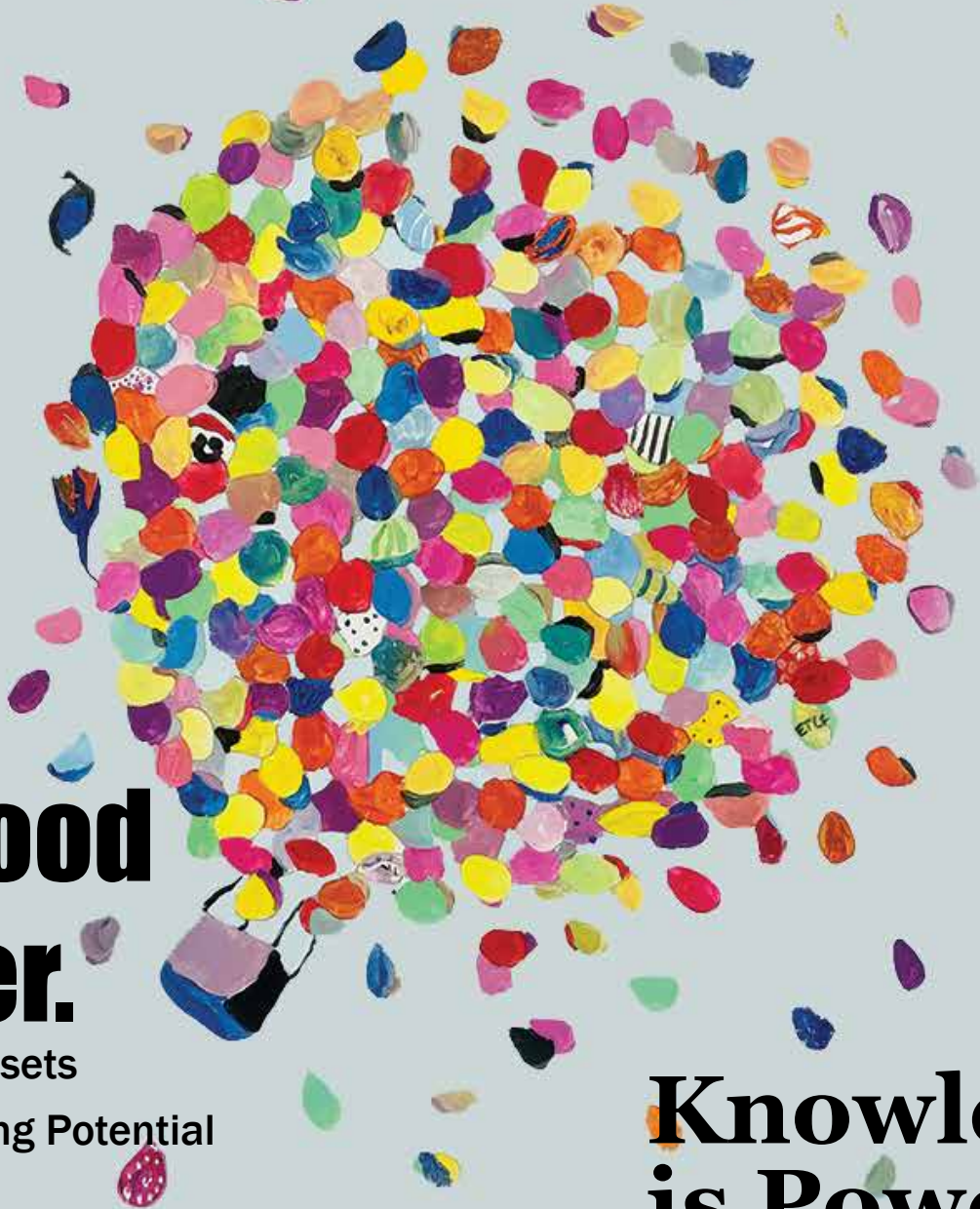


# Simplified Charitable Giving



**Do Good  
Better.**

Complex Assets

Unlock Giving Potential

**THE BEST DAY  
TO GIVE!**

**Knowledge  
is Power.**

Scholarships Change  
Communities





# The power of **COMMUNITY** starts with generous **PEOPLE.**



For more than thirty-four 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](http://www.etcf.org)

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**ON THE COVER:** Gregg County community members, under the direction of local artist, Dace Kidd, collaborated to paint "Philanthropy Takes Flight" at a gathering hosted by ETCF in Longview, Texas.

## 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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**Photos clockwise from top:**

ETCF Program Officer, Dana Durman, presents a grant check to Lillie Russell Memorial Library Executive Director, Shannon Reid.

Vicki Dumont, Executive Director of the Community Food Pantry in Tool, Texas, celebrates the grand opening of Miss Fran's Teaching Garden in Malakoff, Texas, with the garden's namesake, Ms. Fran Sonka.

Bowie County based nonprofit, Tough Kookie Executive Director, Katina Levingston and her husband Joe, celebrate East Texas Giving Day.

Kyle Penney and Longview Advisory Committee Member, Day Shelmire.

ETCF Board members Mark Whatley, Alan Roseman, Jay Ferguson and Anthony Brooks.



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***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 at the annual Power of the Purse luncheon are Dana Hill, Kathryn Martinez, Holly McFarlin, Whitney Lamonte, Beth Filla, Mary Dupuis.

**Youth Development:** A grant was given to the Concerned Black Men of Lufkin to provide financial support for students attending the Don Boyd Summer Camp. The camp provides reading, writing and math skills to students 6-12 years of age.





**Clockwise from top:**

**Community Development:** The Texas African American Museum was founded in 2017 as a branch of the Empowerment Community Development Corporation to preserve African American history. In February, the group hosted their second annual Black History Month Gala. Pictured left to right are Gloria Mays Washington, Greg Muckleroy and Sarah Cummings.

**Youth Development:** Bishop Gorman Catholic School received funding to assist in hosting the 19th annual Macy Chenevert Memorial Basketball Tournament. Ms. Chenevert was diagnosed with Ewing Sarcoma cancer in 2004, and died a few months later at the age of 14. Throughout her treatments, she continued to lead her basketball team both on and off the court demonstrating strength, determination and compassion.

**Human Needs:** A grant to Breckenridge Village of Tyler provided equine therapy to residents. Breckenridge Village of Tyler is a caring residential community for adults with mild to moderate intellectual disabilities.

**Education:** Christy's Safe Haven, whose goal is to promote positive youth development in children age 10-19, received funding for school supplies for 600 students.



# Tatum Music Charitable Foundation Makes Grants to Area Nonprofits

The Tatum Music Charitable Foundation held at East Texas Communities Foundation (ETCF) in Tyler, Texas, awarded \$50,000 to assist 11 charities serving Gregg County, Texas, and Smith County, Texas.

“East Texas Communities Foundation welcomes the opportunity to help donors fulfill their charitable goals,” said Kyle Penney, President of East Texas Communities Foundation. “Tatum Music Company has exhibited a long history of supporting the needs of our area. These grants will provide much needed resources to assist the critical work of each of these nonprofits”

Nonprofits receiving the grants provide a wide range of critical services and programs to children living in the counties where Tatum Music Company currently has storefronts.

“Tatum Music Company has been blessed to be a part of this community for seventy-five years,” said Doice Grant, owner of Tatum Music Company. “With these grant’s we wanted to focus on children’s causes and make an impact on the lives of kids in the communities we serve.”

Tatum Music Charitable Foundation grantees included:

## Gregg County

- The Martin House Children’s Advocacy Center
- East Texas CASA
- East Texas Special Children’s Projects
- Boys and Girls Clubs of the Big Pines
- SeeSaw Children’s Place
- United Way Longview

## Smith County:

- Tyler Day Nursery
- Children’s Miracle Network
- CASA for Kids of East Texas
- Children’s Advocacy Center of Smith County
- United Way of Tyler

“These grants were made possible because local families made investments in music programs across East Texas,” said Grant. “My wife and I wanted to do something

special in honor of the store’s 75th anniversary, so in 2022, we decided to allocate a portion of each rent-to-own instrument agreement that was completed.” Grant added, “You have to have supportive parents and teachers when you are a band student and we know that some kids are missing that. We wanted to use this opportunity to help those kids that have been dealt a bad hand by giving to organizations helping them overcome life’s challenges.”

## Photos clockwise from top:

Shirley Qualls, Executive Director at SeeSaw Children’s Place accepts a grant check from David Harper.

DeAnna Sims with Children’s Advocacy Center of Smith County accepts a grant check from Tim Bagert.

Beth Grant presents a grant awarded to CASA for Kids of East Texas Executive Director, Mary Jo Burgess.



**Photos top to bottom:**

**Arts & Culture:** The East Texas Speakers Forum hosted an Evening with Patrick Mahomes at UT Tyler Cowan Center, Tyler, Texas. The regional nonprofit speaker series plans to host more events over the next year in the communities of Mount Pleasant and Marshall, Texas.

**Arts & Culture:** The East Texas Symphonic Band, under the direction of Dr. James Snowden, performed a free concert at Teague Park Amphitheater in Longview, Texas. The concert was made possible in part by a grant from the Evans-Merrick Music Grants Fund.

**Environment:** A grant to Caldwell Zoo in Tyler, Texas, will be used to enhance propagation efforts to save the Texas Horned Lizard. A portion of the grant will also be used on re-designing and expanding the facility to provide more public viewing areas. *Photo courtesy of Linda Davidson.*





East Texas nonprofits gathered at the East Texas Giving Day Kick Off seminar to network and share ideas to help them have a successful campaign.



# The Best Day to Give.

Charities in East Texas benefited from the generosity of more than 5,900 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 30th, and ended at midnight. Donors contributed \$3,552,862 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 365 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.

Titus County based Northeast Texas Community College led the charge, receiving the most overall contributions with a total of \$255,534. Smith County nonprofit, Breck-

enridge Village of Tyler, followed, raising \$222,559. Bowie County nonprofit, Texas A&M University, Texarkana Campus, secured third place by raising \$198,216.

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, KSWP 90.9 and KAVX 91.9, Townsquare Media in Tyler, Lufkin and Texarkana, Tyler Today Magazine, 4 States Living, Texarkana Today. Media sponsors helped publicize Giving Day with online public service announcements and live broadcasts throughout the day.

# Impacting Community with Corporate Giving

Employers across East Texas are supportive of nonprofits, but one local company decided giving back would be a great way to engage their employees and create a culture of philanthropy.

Jasper, a family-owned business headquartered in Whitehouse, Texas, that provides gas processing solutions, wanted to involve employees directly in the company's charitable work. In June 2018, the executive team established the Jasper Employee Directed Giving Fund at East Texas Communities Foundation.

The Jasper Employee Directed Giving Fund fulfills two purposes. One is to provide donations to worthy nonprofits in East Texas and the second is to give employees a voice in the process of intentional corporate generosity.

The Employee Directed Giving Fund is made up of a committee of five employees. To be considered for the committee, an employee must be employed by one of the Jasper family of companies for two years as well as volunteer within the community. Once a quarter, the employee committee reviews, discusses and votes on electronically submitted nonprofit grant applications.

"The goal of the fund is to support causes we as employees are passionate about that align with the company's mission and values," said Melissa Winebarger, Beyond Business Manager at Jasper. "The fund has been an exciting way for employees to learn about the needs of the community and the organizations in our community doing the work."

The company encourages its employees to personally give back using their time, talent and treasure. To strengthen this philosophy, each employee is provided eight paid service hours to volunteer.

During East Texas Giving Day, the Beyond Business team challenged employees to commit to giving personally, setting a goal of 50 employees participating in the online event.

"Our employees amaze us with their generosity and love for community," said Winebarger. "During East Texas Giving Day, our employees gave over \$49,000 to support participating nonprofits. Not only does this make our community stronger, it makes our company stronger."



Jasper employees are challenged to give back to their community through volunteering or financial contributions. The company set a goal on East Texas Giving Day for 50 employees to participate in the regional online fundraising event.

# FUND TYPES

People look to East Texas Communities Foundation to help fulfill their charitable 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 charitable fund 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 make gifts to your fund at any time, taking a tax deduction for the year in which the gift is made. You, or your designated advisor, may then make grant recommendations from the fund at any time to charities of your choice. A Donor-Advised Fund may be created by an individual, family, group, or organization to support public charities.



## SCHOLARSHIP FUND

Scholarships are often established by individuals or organizations to support academic interests or to memorialize a loved one. Scholarship funds provide deserving student's the opportunity to attend a certain school or pursue a field of study which was meaningful to a donor. Businesses and civic groups may set up scholarship funds to encourage students to pursue a particular field of study, honor a founder or long-time employee, or to encourage the next generation of community leaders.



## NONPROFIT FUND

Nonprofit organizations or their donors can establish a fund to support a single charity. The fund may allow access to principal or serve as a permanent endowment. ETCF provides investment management and can help charities receive complex assets such as real estate or business interests. Nonprofit funds are eligible to receive Qualified Charitable Distributions (QCDs) from an IRA.



## DESIGNATED FUND

A Designated Fund can be customized to meet the unique charitable objectives of the donor. A designated fund can benefit multiple nonprofits following a formula or distribution plan established by the donor.



## FIELD-OF-INTEREST FUND

A Field-of-Interest Fund supports multiple organizations within a defined category. Donors typically choose a defined geographic area, or category of charitable interest. A Field-of-Interest fund utilizes a committee to recommend grants to fulfill the charitable objectives of the donor. Such a fund may also accept applications from area nonprofits.



## 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 compliment your estate plan.



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 multiple 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, monitoring performance and compliance with ETCF investments policies.

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.



**Clockwise from top:** **Youth Development:** In Palestine, Texas, Boy Scout Troop 440 received a grant to fulfill their mission of preparing young people to make ethical and moral choices over their lifetime by instilling in them the values of the Scout Oath and Law. For the past two years, the Troop has worked the Wreaths Across America at Olive Branch Cemetery in Anderson County, Texas, to place wreaths on graves of veterans the week before Christmas.

**Human Services:** The King's Rein, located in Larue, Texas, engages equines to help restore people's mental and emotional health, develop self-worth, trust and discipline. A recent grant helped the organization complete their tack room.

**Education:** Titus County Reads is a program within Titus County Cares that focuses on comprehensive literacy development by targeting young readers.

**Community Development:** The Greater Longview United Way partners with 20 local agencies that operate 37 programs addressing basic needs within the community. The United Way offers tax assistance for low-income families and prescription drug discounts to ease health care costs.

# Establishing a Scholarship Fund.

Scholarships are often established by individuals or organizations to support academic interests or to memorialize a loved one. Scholarship funds provide deserving students the opportunity to attend a certain school or pursue a field of study which was meaningful to the donor. Businesses and civic groups may also choose to set up scholarship funds to encourage students to pursue a related field of study, honor a founder or long-time employee, or to encourage the next generation of community leaders.

---



Create and Name the Fund



Students Apply Online



Celebration and Recognition

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

Scholarships are awarded based on criteria established when the fund is created. Some common criteria you may consider when establishing a scholarship include financial need, career interests, academics, extra curricular activities, or first generation college students.

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

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 evaluation committees to review the scholarship applications and recommend recipients.

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.



“Thank you for awarding me the **Richard B. and Mary Lou Hamm Scholarship**. This scholarship will help relieve a portion of my financial burden while attending college and allow me to focus on my academics. I hope some day to be able to give back to other students the way you have given back to me.”

-Isaiah Price, 2024 graduate of Bullard High School, Bullard, TX.  
University of Texas at Tyler



# Spring is Scholarship Season

East Texas Communities Foundation awarded \$887,250 in scholarships to high school and college students across East Texas for the 2024-25 school year. Scholarship amounts range from \$500-\$30,000 per student, from 100 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 162 new recipients of scholarships and 115 renewing scholarship recipients. Over 6,000 applicants applied for available scholarships this year.





# Establishing a Field-of-Interest Fund.

Field-of-Interest funds provide opportunities for donors to support a specific area of interest such as a geographic region or focus area. A Field-of-Interest Fund uses a committee or competitive grant process to make grant recommendations. ETCF will work with you and your advisors 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. This fund type is excellent for donors who wish to leave a legacy through an estate gift or bequest.



Create and Name the Fund



Professionally Managed Investment



Nonprofits Meeting Criteria Receive Grants

ETCF staff walk donors through the process of creating and naming the Field-of-Interest Fund. We work closely to define the parameters of the fund, including the geographic boundaries, or other specific interest, so the fund will meet your charitable goals.

A Field-of-Interest Fund can also be the beneficiary of a remainder interest from a Donor-Advised fund, retirement account or bequest, securing a legacy of support for a predetermined 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.

Field-of-Interest 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.

Field-of-Interest 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.

# The Miller Fund: Generosity & Foresight Benefiting Henderson County – *FOREVER*

After a lifetime of giving back to her hometown, Mrs. Miller wondered what would happen to her favorite charities after she passed away and could no longer support their work. Through the guidance of her estate attorney, Mrs. Miller created a fund that will forever support the place she loved so much.

Janice Owen Miller was born December 8, 1918, in Malakoff, Texas, to the late Dr. D.B. Owen and Willie Julia Riddlesperger Owen. After graduating from Malakoff High School, Janice completed a bachelor's degree at The University of Texas at Austin. Janice married Edwin A. "Blue" Miller and they built a successful business in Athens, Texas.

Following Blue's death in 1973, Janice remained in Athens, Texas, operating their business and giving back to local nonprofits. Mrs. Miller loved her community and was known as a generous benefactor, giving both her time and her resources to many groups and worthy causes across Henderson County. She was a member of the First United Methodist Church of Athens, served on the Board of Directors for The Ark student ministry at Trinity Valley Community College and was a supporter of the East Texas Arboretum.

In 2005, with the guidance of her estate-planning attorney and financial planner, Ms. Miller established a Donor-Advised fund at East Texas Communities Foundation (ETCF). The Donor-Advised fund allowed her to maximize tax deductions while continuing to give generously to her favorite charities.

At the same time, Mrs. Miller created her Donor-Advised fund, she and her advisors developed a plan for testamentary

giving by creating a permanent Field-of-Interest fund at ETCF. Unlike the Donor-Advised fund, which permitted her to give to an unlimited number of charities anywhere in the United States during her lifetime, the Field-of-Interest fund would take over upon her death and be restricted to making grants to charities serving Henderson County, Texas. The fund detailed that ETCF should consider her favorite charities each year, yet provide the freedom to consider other nonprofits serving the community. She also wanted the fund to bear the name of both her and her husband, Blue.

Mrs. Miller died in 2007. Since that time, the Edwin A. "Blue" and Janice Owen Miller Charitable Fund has supported a variety of charities including ones not in existence during Mrs. Miller's lifetime. Since its inception, the Miller Fund has made grants in excess of \$1.8 million to support nonprofits serving Henderson County, Texas.

The beauty of Mrs. Miller's story lies not only in what she accomplished during her lifetime but also in her planning for the future. Thanks to thoughtful planning, Mrs. Miller's generosity will forever be felt in Henderson County, Texas.



**Photos top to bottom:**

Mrs. Janice Owen Miller

Representatives from nonprofits serving Athens, Texas, pictured left to right: Chris Harrison with The Ark Campus Ministry, Wanda Miles with Lila Lane Outreach, Robin Newton with the Children's Clothing Ministry of the First Baptist Church, Patsy Fowler with Henderson County Memorial Library.



# Establishing a Nonprofit Fund.

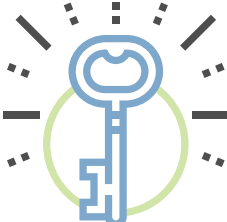
Organizations and individuals can establish a nonprofit fund to help provide essential funding to support the nonprofits' mission now and – forever. Establishing a nonprofit fund can provide a reliable stream of annual funding, while growing to meet future needs.



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 non-budgeted 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 participate in professionally managed and broadly diversified pooled investment portfolios.

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.



Discovery Science Place (DSP) was founded in 1993 with the mission to ignite curiosity in young minds through fun, hands-on exploration. DSP has two non-profit funds with the flexibility to provide long-term and short-term stability for the organization.

“Having an endowment as well as a reserve fund, provides our organization and donors confidence about our future,” said Carol Whiteside, Executive Director of Discovery Science Place. “Our endowment offers an additional, reliable source of income that can provide long-term support, ensuring DSP’s sustainability even during challenging times.”

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

*- Carol Whiteside  
Executive Director of  
Discovery Science Place*



Founded in 2007, the Women’s Fund of Smith County, through collective giving, transforms the community by funding programs that enrich the lives of women and children in Smith County, Texas.

“From inception The Women’s Fund membership has valued building an endowment that supports women’s and children’s programming,” said Executive Director Zoe Lawhorn. “Building a solid foundation for future investment in women’s issues is a strategic goal of our organization.”





# HEALING POWER OF ANIMALS



Imagine going to the hospital to have surgery and being able to take your favorite pet with you as a source of comfort. While that scenario is unlikely to happen due to hospital protocols, you can, in reality, have a dog, cat, or even a horse help with your recovery. How? Through animal-assisted therapy.

Animal-assisted therapy uses dogs, cats, or other animals to help people as they recover from physical and mental health conditions. The companionship of the animal has proven benefits in both medical and psychological work. Pet therapy has been linked to the reduction of anxiety, pain, and depression in people with a range of mental or physical health problems.

As a hub for medical care in East Texas, Smith County is the home to a nonprofit that provides animal-assisted therapy called Therapet. Founded in 1994, Therapet is a nonprofit organization that provides animal-assisted therapy to promote health, hope, and healing.

In 2014, an anonymous donor established the Therapet Designated Fund. When the original fund was created, the donor encouraged the nonprofit to consider creating other funds to assist with the long-term sustainability of the beloved organization.

“Our board welcomed the challenge set forth by our donor,” said Elysia Reineck, Executive Director of Therapet. “Creating an endowment fund was always a goal but without the donor’s gentle nudge it may have been a while before it was established. Since its creation, it has afforded our team the opportunity to talk to donors about how we are thoughtfully planning for today as well as tomorrow’s needs.”

Since the initial fund was launched in 2014, Therapet has established four funds addressing different organizational goals and needs.



**Photos top to bottom:**

Therapet Executive Director, Elysia Reineck sits with one of the specially trained therapy dogs.

Therapet dog, Texana, visits with patients at Encompass Health Inpatient Rehabilitation.

Yager the Beagle was a frequent visitor at Chapel Hill ISD and a Therapet for 10 years before his retirement in 2022.

# Establishing a Designated Fund.

Designated funds provide opportunities for donors to “designate” the specific charity (or charities) 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.



Create and Name the Fund



Professionally Managed Investment



Designated Nonprofit Receives Grants

ETCF staff will 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 or other specific interest, so the fund will meet your charitable goals.

A Designated Fund can also receive a Qualified Charitable Distribution (QCD) from an IRA for donors who are 70 ½ or older.

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
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## 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



T.J. and LaVerne Plunkett married in 1939. Upon the death of her husband in 1996, Mrs. Plunkett established the T.J. and LaVerne Plunkett Foundation as a way to honor her husband’s memory and his commitment to generosity in their community.

The Plunkett Foundation was moved to East Texas Communities Foundation in 2021 so their legacy of impact could be sustained forever.

# Plunkett Foundation Awards Grants to Nonprofits Serving East Texas

Nonprofits serving Gregg, Rusk, Smith and Upshur counties were awarded grants totaling \$85,000 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.”

Gregg County nonprofit, Legacy Closet of Longview, received funding to provide car seats to foster families.

“This grant will be put to use immediately,” said Angela Dean, Board President of Legacy Closet of Longview.

“Children often arrive into the care of a foster family with little to nothing in the way of supplies. One of the most immediate needs for a foster family is a car seat to transport the child safely to appointments. Generous funding from the Plunkett grant will cover the cost of purchasing new car seats for families over the upcoming year.

Legacy Closet of Longview, through the help of volunteers, offers families a “closet” with clothes, shoes, baby gear, cribs, car seats, toys, school supplies and other items kids need when placed into foster care.

T.J. and LaVerne Plunkett Foundation grant recipients:

## Rusk County

- Boys and Girls Club of Rusk County: STEM program

- Christian Women’s Job Corps of Rusk County: general operating support
- Henderson Food Pantry: general operating support
- Queen Price Community Enrichment: Beautification and community enrichment projects in Overton, Texas

## Gregg County

- Legacy Closet of Longview: car seats for foster families
- Longview Dream Center: food purchase
- Salvation Army of Longview: Commodities Closet and Food Pantry
- Texas Shakespeare Festival Foundation: general operating support

## Smith County

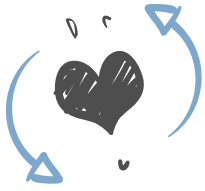
- Champions for Children: teacher training program for Rusk County
- Gold Network of East Texas: general operating support
- King’s Storehouse Food Bank: food purchase
- Starbrite Therapeutic Equestrian Center: laptops and iPads for instructors

## Upshur County

- Presbyterian Camps at Gilmont: Circle of Friends camp support







*work*  
**HARD**

*give*  
**BIG**



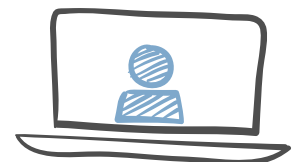
make giving your business  
by creating a fund at...



[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 tax efficient 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 otherwise reduce the net proceeds of the stock if sold by the donor 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.

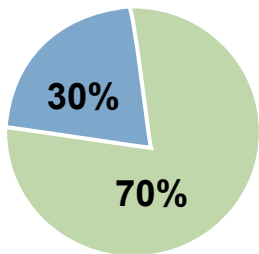
Through the use of charitable planning strategies, donors may be able to unlock some of an assets appreciated value, and significantly reduce capital gains taxes while benefiting their favorite charities. To learn more about donating non-cash assets and the charitable impact you can make, give us a call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

# Investment Options

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 our professionally-managed investment portfolios by selecting an actively-managed investment portfolio or a portfolio of passive index funds following the investment strategies described below.

## STABLE VALUE



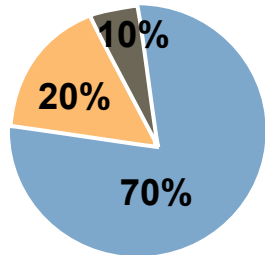
### Investment Objective:

Preservation of capital with limited income potential

Recommended for funds which are seeking to preserve principal, minimize risk, and achieve modest return when market conditions allow, using high-quality, short-term debt instruments, cash and cash equivalents.

Target Return: 90-Day T-Bill Rate of Return

## CONSERVATIVE



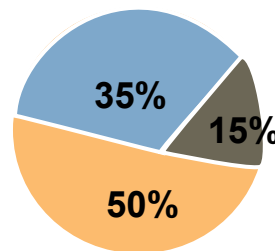
### Investment Objective:

Preservation of capital and maintenance of purchasing power

Recommended for funds which are expected to distribute income and principal in the short-term. Any distributions will likely include "principal" distributions.

Target Return: 3.5%

## MODERATE



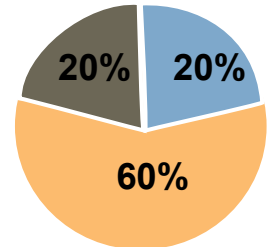
### Investment Objective:

Maintenance of purchasing power and growth of capital & income

Recommended for endowment and permanent funds making annual distributions.

Target Return: 5.5%

## GROWTH



### Investment Objective:

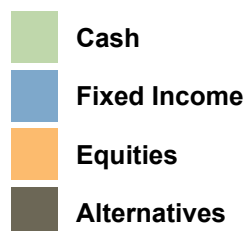
Capital appreciation

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

Target Return: 6.5%

## 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.



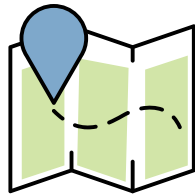
# Professional Advisors

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:



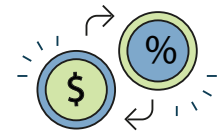
Identify charitable giving interests and goals.



Provide information on community needs and on the agencies that are of greatest interest to your clients.



Create and implement charitable plans integrated with major business, personal, and financial decisions.



Match charitable interests with tax planning needs.

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## ETCF Partners with Investment Firm

East Texas Communities Foundation has partnered with Graystone Consulting, which provides world-class investment expertise, to manage the charitable funds that have been entrusted to the Foundation.

Graystone will serve as ETCF's Outsourced Chief Investment Officer (OCIO), functioning as an extension of our staff, board and Investment Committee. ETCF's leadership believes this model will enable ETCF to preserve and grow capital, helping to ensure that donors' charitable assets benefit the community now and for generations to come.

"Our investment committee interviewed several investment consulting firms and chose Graystone based on the experi-

ence of their team and their work with similar community foundations," said Kyle Penney, ETCF President. "Given the complexities of the markets and the responsibility that the Foundation has to steward the resources of many East Texas donors and nonprofit organizations, we believe that utilizing an outsourced OCIO approach will allow our investment pools to perform at their highest potential and respond to changing market conditions."

Graystone also supports ETCF's investment committee in the stewardship of charitable funds managed by investment advisors recommended by donors.

Melissa Briscoe, CFO at Bethesda Health Clinic and Robin Hampton, Executive Director for East Texas Symphony Orchestra, attended an investment presentation hosted by ETCF.



Paul Cox and Chris Calmer with Graystone Consulting stand with Kyle Penney and ETCF Investment Chair, Scott Terry.



# Retirement Accounts

*Give more for less by utilizing your IRA for charitable donations.*

People of all ages own IRAs. From their inception, IRAs were designed so investors could accumulate retirement assets through individual contributions or employer-sponsored retirement plans.

Traditional IRAs provide tax-deferred growth, meaning you won't pay taxes on your untaxed earnings or contributions until you are required to start taking distributions. With more than \$10.8 trillion in assets in 2020, individual retirement accounts represent 64 percent of the total assets in the US retirement market.

When individuals reach age 73, they are mandated to take required minimum distributions (RMD) from their IRA. Some may not wish to take the IRA distribution because they are subject to ordinary income tax, and more taxable income may push these IRA owners into a higher tax bracket. In particular, a higher tax bracket can have adverse impacts on Social Security and Medicare benefits.

Clients age 70 ½ years or older can make qualified charitable distributions (QCDs) up to \$105,000 per year from their IRA account to a charity of their choice without increasing their taxable income. Married couples with separate IRAs can contribute up to \$210,000 to charity. Those amounts are also now indexed to inflation so they will in-

crease over time. Donating directly to a qualifying charity like East Texas Communities Foundation (ETCF), may also satisfy your RMD for the year. IRA owners can support their favorite causes by using a variety of fund types offered by ETCF:

- ➔ **Scholarship Funds** can be tailored to benefit students with specific interests, academic or extracurricular achievements.
- ➔ **Nonprofit Funds** allow an organization and its supporters to build long or short-term funding, essential to support their mission now and forever.
- ➔ **Designated Funds** are ideal for donors who know exactly which nonprofits they want to support, what field of interest they are interested in developing or the geographic location they wish to focus on.

Directing IRA assets to charity is a simple and easy way to provide for your favorite nonprofit while not increasing your taxable income. For many individuals, outside of their real estate holdings, an IRA may be the largest asset within their estate. By creating a fund at ETCF and funding it with a distribution from their IRA, a donor can reach their charitable goals and avoid unnecessary taxes.



The Evans-Merrick Music Grants Fund is a Designated Fund, funded by yearly IRA distributions. The funds purpose is to provide support and encourage traditional or classical music activities across the East Texas region. In order to be considered for a grant, the music program must be offered free to the public.

The Mount Vernon Music Association was a recipient of a grant from the Evans-Merrick Music Fund held at East Texas Communities Foundation. The grant was used to provide a summer concert free to families.

# 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  
Amy and Tom Woldert Donor Advised Fund  
Anderson-Vukejja Donor Advised Fund  
Anne & Grady Caldwell Hagan, Jr. Charitable Fund  
Ashley Prothro Trant Charitable Fund  
Bagot Family Charitable Fund  
Barbara and Billy Bass Charitable Fund  
Barker Family Foundation  
Baxter Family Charitable Fund  
Beryl Berry Donor Advised Fund  
Betty Danielson Memorial Fund for Youth  
Bonnie Beall Children's Fund  
Brad and Ann Brookshire Donor Advised Fund  
Brent and Leslie Kerns Charitable Fund  
Brian and Elizabeth Feiden Charitable Fund  
Brian & Jan Hancock Donor Advised Fund  
Bridge Builder Charitable Fund  
Brown Family Donor Advised Fund  
Bunnie Schulz Memorial Fund  
Carl and Evelyn Bochow Donor Advised Fund  
Carrie-Ann and Jason Yearly Charitable Fund  
Cecil and Bernie Ward Family Donor Advised Fund  
Cordell Family Donor Advised Fund  
Cynthia and Whit Riter Donor Advised Fund  
Dement Family Charitable Fund  
Denarii Fund  
Dent Charitable Fund  
Dimond Family Charitable Fund  
Dirk and Patti Coleman Charitable Fund  
Don and Michele Mischnick Charitable Fund  
Don't Get Hurt Twice Charitable Fund  
Dr. and Mrs. Charles Gordon Donor Advised Fund  
Dr. and Mrs. Jeffrey G. Carr Charitable Fund  
Dr. T.H. Glover Donor Advised Fund  
Dwayne & Margaret Wilson Charitable Fund  
Edgar and Lisa Baker Charitable Fund  
Elizabeth Faulkner Kirwan Donor Advised Fund  
Emily and Gerald Gibson Fund  
Eric and Lori Smith Donor Advised Fund  
Erin and Brent Jasper Charitable Fund  
Frank J. Budde and Marilyn Budde Fund  
Franklin and Brooke Swann Charitable Fund  
Fred and Carol Smith Family Donor Advised Fund  
Fred and Ginger Haberle Charitable Fund  
Friend Ship Charitable Fund  
F. William and Mary Jo Martin Donor Advised Fund  
Gail and Roy Sloan Jr. Charitable Giving Fund  
Geoff & Joleen Doke Charitable Fund  
Gerard Family Donor Advised Fund  
Gerry & Esther Bovenkamp Charitable Fund  
Glenda Barrett Charitable Fund  
GTG Fund  
Harry and Gail Wallace Donor Advised Fund  
HPP Fund  
H.T. and Laura Hyde Charitable Fund  
Hurst Family Fund  
Jack and Glenda Mann Donor Advised Fund  
Jackson Family Charitable Fund  
James and Dorothy Thompson Charitable Fund  
Jane E. and Les Campbell Charitable Fund  
Jeff and Angie Billings Charitable Fund  
Jeff and Sissy Austin Donor Advised Fund  
Jimmy and Gail Evans Charitable Fund  
Joe and Rainey Freeman Charitable Fund  
John and Lisa Jones Charitable Fund  
Johnna and Kevin Fullen Charitable Fund  
Jo Martin Charitable Fund  
Jon and Susan Jasper Charitable Fund  
Jones Legacy Ventures Charitable Fund  
Joshua and Rachel Kate Machiavello Charitable Fund  
Joyce and Zelick Greenberg Donor Advised Fund  
Joyce Buford Donor Advised Fund  
Julie and Terry Pace Charitable Fund  
Justin Paul Walker Fund  
Karen Faulkner Key Donor Advised Fund  
Karleen Draper Donor Advised Fund  
Ken and Joyce Roddy Donor Advised Fund  
Lagniappe Fund  
Lance and Kandis Autrey Charitable Fund  
Larry and Dana Fleming Charitable Fund  
Larry and Rhonda Parker Charitable Fund  
Lauren Buford Donor Advised Fund  
LeGrande and Cassandra Northcutt Donor Advised Fund  
Lisa and David Beard Donor Advised Fund

Louis and Peaches Owen Donor Advised Fund  
Lowery Fund  
Mandell Family Charitable Fund  
Marilyn Joan Brinkman Donor Advised Fund  
Mary C. Decker Charitable Fund  
McSwane Family Charitable Fund  
Meg and Dan Robertson Charitable Fund  
Michael and Fritter McNally Donor Advised Fund  
Musselman Charitable Fund  
Nancy & Robert Patterson Charitable Fund  
Nblack Charitable Fund  
Nichols Family Fund  
Olivia Smith For Good Donor Advised Fund  
Pam and Thomas Smith Donor Advised Fund  
Pangburn Charitable Fund  
Patrick and Jane Moran Charitable Fund  
Paul and Carla Szafraň Charitable Fund  
P&G Donor Advised Fund  
Phil and Bobbie Burks Charitable Fund  
Phil and Sharon Jenkins Charitable Fund  
Presley C. and Virginia B. Hudson Donor Advised Fund  
Putman Family Charitable Fund  
Raabe Family Charitable Fund  
Ramey Family Fund  
Reuland & Barnhart Orthodontics Donor Advised Fund  
Rex and Janice Pritchard Charitable Fund  
Richard and Susan Knarr Charitable Fund  
Rick and Jane Rogers Charitable Fund  
Riehm Family Fund  
Riestenberg Family Charitable Fund  
Robert B Irwin Foundation  
Rod and Merle Mabry Family Charitable Fund  
Roy and Helen Hallmark Fund  
Sam Roosth Foundation Fund  
Scholtes Family Charitable Fund  
Schuler Family Charitable Fund  
Scott and Wendi Smith Family Charitable Fund  
Sidney and Anna Lee Allen Charitable Fund  
Stacy and Reid Martin Family Charitable Fund  
Stephanie and Worth Jackson Charitable Fund  
Stephens Family Fund  
Steve and June Hillis Family Charitable Fund  
Summers Foundation  
Suzanne Hunt Davis Donor Advised Fund  
Swann Family Charitable Fund  
Texas Pioneer Foundation Charitable Fund  
The Triumph DAF  
Thomas W. Bochow, MD Donor Advised Fund  
Tim and Michelle Brookshire Family Fund  
Tim Hayward Medical Lecture Fund  
Tokoph Family Charitable Fund  
Turner Family Charitable Fund  
Vicki and Tony Morgan Charitable Fund  
Wiley Lewis Fund  
Youth Challenge Memorial Fund

### Designated Funds & Field-of-Interest Funds\*

Barre and Gene Monigold Fund  
Carolyn F. Hyman Fund  
City of Tyler Park Foundation  
Clopton-Honc Family Fund  
Robert Eric Farmer Memorial Fund  
Rogers-Jackson Pet-A-Palooza Fund  
The Bozman Family Fund  
Therapet Operating Reserve Fund  
Brown Family Charitable Fund  
Burt and Nancy Marans Charitable Fund  
CityServe Community Fund  
Connie Wakefield Fund  
Edwin A. Blue and Janice Owen Miller Charitable Fund  
Evans-Merrick Music Grants Fund  
Gladys and Thomas T.B. Stewart Community Fund  
Harris Community Fund  
John Reagan Harris Community Fund  
Judge Carole Clark Trauma-Informed Training Fund  
Macy Chenevert Memorial Fund for Courageous Youth  
Mary H. Smith Children's Fund  
Minton Family Community Fund  
Mrs. AD Francis Endowment Fund  
Northeast Texas Public Health District Fund  
Oil Patch Benevolence Fund  
R.F. and Jessie Shaw Fund  
Roy & Betty Erickson Charitable Fund for Nursing

T.J. and LaVerne Plunkett Foundation  
Tyler Area Healthcare Workers Support Fund  
Tyler Library Foundation Fund  
Women's Fund of Smith County Endowment

### Nonprofit Funds\*

A. M. and Lillian Brown Memorial Fund  
Anna Wegener Memorial Camp Scholarship  
Arnold T. Sikes Memorial Endowment for the First Tee of Greater Tyler  
Band of Angels Memorial Scholarship  
Ben E. Jarvis Endowment Fund  
Bethesda Health Clinic Funds  
Bill R. Swetmon Educational Endowment Fund  
Camp Tyler Outdoor School Endowment Fund  
Cancer Foundation for Life Endowment Fund  
Carolyn and J.D. Jones Agricultural Endowment Fund  
Casa for Kids of East Texas Endowment  
Children's Village Endowment Fund  
Choir School of East Texas Designated Fund  
Discovery Science Place Funds  
East Texas Crisis Center, Inc. Endowment Fund  
East Texas Symphony Orchestra Endowment Fund  
East Texas Veterans Community Council Board Fund  
Edgewood Heritage Park Reserve Fund  
First Baptist Downtown Missions Ventures Endowment Fund  
Flanagan Nursing Scholarship Fund  
Frances Cowan-Gibson Classical Music Fund  
Greater Longview United Way Endowment Fund  
Habitat for Humanity of Smith County - Jack Wilson Legacy Endowment Fund  
Heart of Tyler Endowment Fund  
Helen Graham Endowment  
Hilman O. McKenzie Fund  
Historic Tyler, Inc. Endowment Fund  
Hospice of East Texas Endowment Fund  
Janette L. Collard Faith Baptist Church Chandler Fund  
Jerald B Sanford Gregg County Animal Shelter Endowment  
John L. and Mary M. Tracy Endowments  
John Wingate Truitt Log Cabin Fund  
Junior League of Tyler Beverly Beard Scholarship  
Kathy Sleeper Endowment for Innovation in STEAM Education at Bullard ISD  
Kevin and Kelly Eltife Scholarship Fund for Texas College  
Laura Hyde East TX Symphony Orchestra Designated Fund  
Lindale ISD Education Foundation Endowment Fund  
Lindsey Police and Firemen's Endowment Fund  
Literacy Council of Tyler Adult Literacy Endowment Fund  
Martin Family Fund for the United Way of Tyler/Smith County  
Mary John Spence Endowment  
McCarly Heart Endowment Fund  
Meals on Wheels Endowment Fund  
Mr. & Mrs. Bob Herd Fund  
Nacogdoches Area United Way Endowment Fund  
Neal and Peggy Garland Scholarship Fund  
New Creation Foundation Endowment  
Newgate Mission Endowment Fund  
Palestine University Academy Fund  
PATH Endowment Fund  
Program for Humanitarian Aid (PHA)  
Smith County Bar Foundation Funds  
Spence Plaza Endowment Fund  
Steve and Penny Carlie Marshall ISD Fund  
Suzette D. Shelmire Children's Education Endowment at the Dallas Zoo  
The ARC of Smith County Funds  
The Children's Park Endowment Fund  
The Mentoring Alliance Endowment Fund  
Therapet Funds  
The Texas Chest Foundation Fund  
Thurma Rhoades Girls Athletic Scholarship Endowment  
Tributary Retreat Center Donor Designated Fund  
Trinity School of Texas funds  
Tyler Biking/Hiking Trails Fund  
Tyler Civic Theatre Endowment Fund  
Tyler Day Nursery Endowment Fund  
Tyler ISD Foundation Funds  
Tyler Rotary Foundation Endowment Fund  
United Way of Tyler/Smith County Fund  
UT Tyler Palestine Campus Designated Fund  
Windridge Therapeutic Equestrian Center of East Texas  
Winnboro Center for the Arts Capital Fund  
Winnboro Community Resource Center Designated Fund  
Women's Fund of Smith County Sustaining Fund

### Scholarship Funds

Acosta Family Charitable Scholarship Fund  
Adam Carroll Scholarship Fund  
A D and Mary Winston Scholarship Fund  
Alex Fleming Infinity Scholarship Fund  
Allen and Nancy Locklin Scholarship Fund  
Art Excellence Scholarship Fund  
Barbara Bass Community College Scholarship Fund  
Ben and Florine Ramsey Scholarship Fund  
Ben & Bettye Bitz Scholarship Fund  
Brook Hill Founder's Scholarship Fund  
Buck Florence and Thomas C. Turner Scholarship Fund  
Byers Family Foundation Scholarship  
Captain William Barron Chapter Texas Society of the Sons of the American Revolution Scholarship  
Carroll and Casey Gurganus Scholarship  
Christopher Lyon Memorial Scholarship Fund  
Citizens 1st Bank/Perkins Family Foundation State Employees' Children's Scholarship Fund  
Dalton and Betty Jones Scholarship Funds  
David G. and Jacqueline M. Braithwaite Scholarships  
Donald Scott Cooper Nursing Foundation  
Earl Campbell Tyler Rose High School Scholarship  
East Texas Estate Planning Council Scholarship  
East Texas Geological Society Scholarship Fund  
Edna Faulk Haberle Visual Arts Scholarship  
Eiche Family Scholarship Fund  
Falconer Scholarship  
Frances Cowan Gibson Fine Arts Scholarship  
Frederick Michael Nachman Memorial Scholarship  
Gary Neel Memorial Scholarship Endowment  
Gertrude Windsor Garden Club Scholarship  
Gladys and Thomas T.B. Stewart Scholarships  
Glenn and Vivian Prater Memorial Scholarship Fund  
Helen Elbert Scholarship Fund  
Henry & Evelyn Jordan Scholarship Fund  
Hispanic Professionals Association of Tyler Scholarship  
Hubert Hub McGlothlin Scholarship Fund  
Hugh P. Brown Memorial Scholarship  
Jackson Huse Scholarship Fund  
Jean and Jim Gulley Texas Tech Scholarship  
Joe & Marguerite Davis Scholarship Fund  
Joey Johnson Memorial Scholarship  
Juliette Low's Amazing Girls Scholarship Fund  
Kathy's Kids Scholarship Fund  
Kenny Ponder Starwoodcraft Scholarship  
Lake Fork Fishing Scholarship  
Lauren Lewis Memorial Scholarship Fund  
Leslie Reid Memorial Scholarship Fund  
Lt. Donaldson Tilar Memorial Scholarship Fund  
Mark W. Allen Memorial Scholarship Fund  
Minton Family Scholarship Fund  
Nancy A Berkhouse Classical Art Scholarship  
Natural Gas Society of East Texas Scholarship Fund  
Nickolas-Truszkowska Scholarship Fund  
Partners in Arts Scholarship Fund  
Pasha Zapolsky Memorial Scholarship Fund  
Patsy Key Ponder Scholarship  
Randy Wilmon Memorial Firefighter Scholarship  
R. Don Cowan Music & Performing Arts Scholarship  
Reily Foundation Scholarship  
Retail Merchants Association Scholarship Fund  
Reuland & Barnhart Orthodontic Scholarship Fund  
Rhonda Penry Scholarship Fund  
Richard B. and Mary Lou Hamm Scholarship Fund  
Robinson Family Memorial Scholarship  
Roy & Betty Erickson Scholarship Fund  
Sherilyn A. Willis MD Medical Scholarship Fund  
Sidney Moughon Scholarships  
Smith County Baptist Minister Scholarship Fund  
Smith County Bar Foundation Scholarship Fund  
Tadge & Bill O'Donnell Scholarship Fund  
Tatum Music Scholarship  
Texas Rose Festival Scholarship Fund  
The Gerald and Charlie Stoker Memorial Scholarship Fund  
Tim King Memorial Scholarship Fund  
TJC Sisterhood Legacy Scholarship  
T. J. Ivey Scholarship Fund  
Tyler Citizens Police Academy Alumni Association Scholarship Fund  
Tyler City Employees Credit Union Scholarship  
Wayne and Margie Morrison Scholarship  
Whitehouse Young Farmers Scholarship  
Willowbrook Country Club Employee Scholarship Fund  
Winifred K. George Scholarship Fund  
Winnie Frank Woolverton Scholarship Fund  
Yamboree Empowerment Scholarship for Women

\*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/>

# 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)