



Chester County COMMUNITY FOUNDATION

Connecting People Who Care With Causes That Matter

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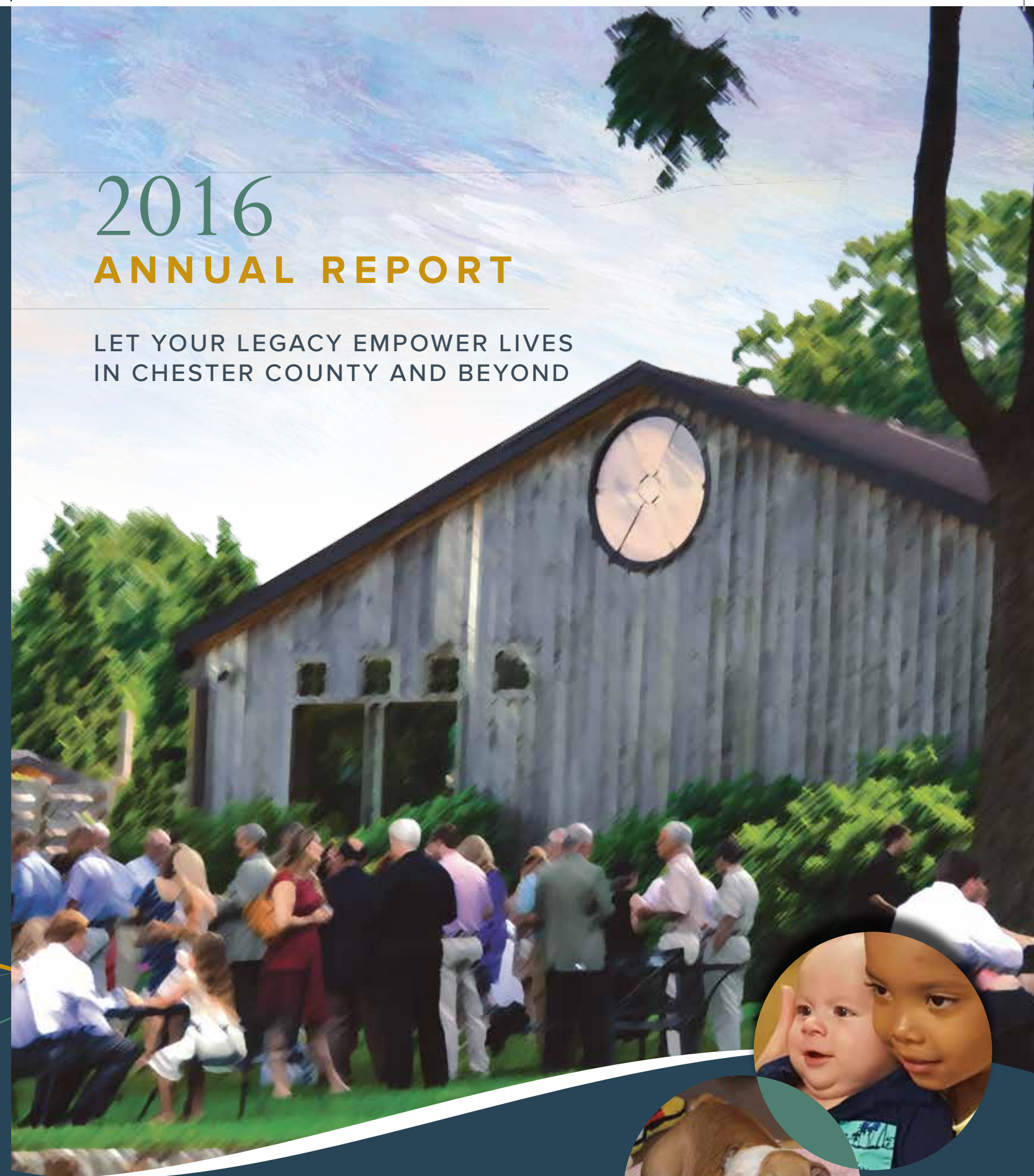
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Front Cover: Galer Winery & Estates Chair's Choice Event by Jessica Nicolosi; Main Line Animal Rescue; Dominic/Aliyah

Back Inside Cover: A View of Corn from 18.2 Hands by Erik Gudmundson

2016 ANNUAL REPORT

LET YOUR LEGACY EMPOWER LIVES
IN CHESTER COUNTY AND BEYOND



Chester County
COMMUNITY FOUNDATION



*If you light a lamp for someone else,
it will also brighten your path.*

~ SIDDHARTHA GAUTAMA

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Connecting people who care with causes that matter,
so their philanthropy makes a difference now and forever.



Confirmed in Compliance with National Standards for U.S. Community Foundations



What is the COMMUNITY FOUNDATION?

Established in 1994, the Community Foundation builds community assets for perpetuity. The Community Foundation is entrusted with substantial amounts of money over time from the contributions of people of all walks of life. The Community Foundation uses the income from these funds, in the form of grants, to meet the community's charitable needs now and into the future.

Most of the funds at the Community Foundation are endowed funds – permanent funds that create a sustainable flow of grant dollars forever. Through prudent investment, both the principal of the endowment and the distribution available for grantmaking increase over time.

The Chester County Community Foundation has three unique features:

- Local Expertise about important projects and programs that make a significant difference in Chester County
- Personalized Service to donors to help maximize the impact of their contribution
- Community Convener for issues that benefit from coordination and/or collaboration

The Community Foundation strives to be inclusive, innovative, responsive and accountable - providing a clear focus for your inspired philanthropy.





Inspire Legacy Philanthropy

Dear Friends of the Community Foundation:

Every two years, the Community Foundation transitions its Board leadership. We do this intentionally, so that volunteers can take on leadership roles for a reasonable amount of time. New leaders bring new ideas and new connections.

When Bill Gallagher came on as Board Chair, he vowed to enhance the Community Foundation’s reach. During Bill’s tenure, the Community Foundation deepened programs and services to our key constituents, focusing on long-term growth. We have refined our:

- **Family & Individual Philanthropy Suite of Services**, including a **Philanthropy Learning-Action-Network** to engage a diverse array of emerging philanthropists
- **Nonprofit Endowment Suite of Services**, to enhance our reach to nonprofit staff and Board members
- **Professional Advisor Outreach**, to engage an array of estate planning attorneys, CPAs and wealth managers in legacy philanthropy.

During the past year:

- we proudly awarded **\$2.5 million in grants and scholarships**, a 25% increase over last year
- **15 new funds** were created, bringing the total number of funds to 342
- contributions totaled **\$3.2 million** from **2,437** donors

Since our 1994 founding, **\$33.5 million** has been awarded via **7,962** grants and scholarships.



As Bob Rigg takes the helm, we will build on our core strengths. We will also make a concerted effort to **enhance our partnerships with businesses**, encouraging community engagement and philanthropy throughout the region. It is clear that life is very, very good in Chester County for many of our neighbors. We at the Community Foundation have been receiving an influx of inquiries from people who want to become more involved in their communities, by volunteering, serving on committees, and serving on Boards. People want to give their time, their talents, and their treasure. The wonderful challenge is to channel this energy, balancing work-family-community commitments.

By connecting people who care to the causes that matter to them, and supporting them along their journey, we aim to build sustainable, long-term, win-win relationships that will have a positive impact on those who give, and those who receive.

We look forward to seeing you at our legacy philanthropy events throughout the year. Thanks for all you do to intentionally and thoughtfully create caring, generous communities...so that Chester County continues to get even better, for now and *forever*.

William Gallagher, Esq.
Immediate Past Chair of the Board
2014-2016

Robert E. Rigg, CIC, CPCU, CLU
Chair of the Board
2016-2018

Karen A. Simmons
President/CEO

Grants & Scholarships



The strength of the Chester County Community Foundation is in its power to change peoples’ lives. Each year, hundreds of organizations—and thousands of people—are touched through the generosity of our donors.

Our donors establish grantmaking funds at the Community Foundation. The majority of grant decisions are made by the families and individuals whose funds the Community Foundation holds in trust. The Community Foundation also grants a modest amount from its Fund for Chester County, based on decisions made by a volunteer Grants Committee. The average grant size is \$3,000.

During FY2016, \$2.5 million in grants and scholarships was awarded to address needs in our community. 547 grants totaling @ \$2 million and 221 scholarships @ \$500,000. This is a 25% increase from last year.

GRANTEES

- | | | | |
|--|---|---|--|
| 2016 Bicentennial/
Richard Allen Statue | Bank Street College of Education | Calvary Chapel of Delaware
County | Chester County Library |
| Academy of Vocal Arts | Barclay Friends | Camp Dreamcatcher | Chester County Opportunities |
| Act in Faith of Greater West
Chester | Barn at Spring Brook Farm | Camphill Special School | Industrialization Center |
| Adventures In Missions | Baughman Memorial United
Methodist Church | Catawba College | Chester County Pops Orchestra |
| Aidan's Heart Foundation | Bethesda Project | Catholic Charities Appeal | Chester County's Children |
| Alianzas de Phoenixville | Bishop Shanahan High School | Centennial Lutheran Church | Children's Country Week |
| ALS Hope Foundation | Bournelyf Special Camp | Charity Treks | Association |
| American Association for
Cancer Research | Boy Scouts of America, Chester
County Council | Charles A. Melton Art &
Education Center | Children's Hospital of
Philadelphia |
| American Cancer Society-East
Central Division | Boys & Girls Club of St. Helena
& Calistoga | Chemical Heritage Foundation | Christ Community Church |
| American Diabetes Association | Brandywine Baptist Church | Chester County 2020 | Cincinnati Children's Hospital
Medical Center |
| American Heart Association | Brandywine Health Foundation | Chester County Art Association | Citizens Advocacy of Chester
County |
| Andrew L. Hicks Jr. Foundation | Brandywine Red Clay Alliance | Chester County Community
Dental Center | The Clinic |
| The Andrew McDonough B+
Foundation | Brandywine Valley SPCA | Chester County Dept of
Community Development | Coatesville Area Senior Center |
| ARC of Chester County | Bridge Academy and
Community Center | Chester County Food Bank | Coatesville Center for
Community Health |
| Archmere Academy | Bridge of Hope of Lancaster &
Chester Counties | Chester County Fund for
Women and Girls | Coatesville Community
Education Foundation |
| Art Partners Studio | Bryn Mawr Rehabilitation
Hospital | Chester County Futures | Coatesville Youth Initiative |
| Association for the Colonial
Theatre | Cabrini College | Chester County Historical Society | Colebrookdale Railroad
Preservation Trust |
| Atlantic Salmon Federation | Cairn University | Chester County Hospital
Foundation | Colonial Theater |

Connecting people who care with causes that
matter, so their philanthropy makes a difference
now and forever.



Community Coalition
Community Volunteers in Medicine
Concordville Fire & Protective Association
Corning Community College
Council on Foundations
County Corrections Gospel Mission
Crime Victims Center of Chester County
Cru
Cure San Filippo Foundation
Daemion Counseling Center
Daylesford Abbey
Delaware County Community College
Dickinson College
Doctors Without Borders USA
Domestic Violence Center of Chester County
Downingtown Area Communities That Care c/o Upper Main Line Y
Downingtown Area Senior Center
Downingtown Library
Drexel University
Drexel University Athletics
Educators for Excellence
Elizabethtown College
Epilepsy Foundation
Evergreen State College Foundation
Fame Fire Company
Family Lives On
Family Promise of Southern Chester County
Family Service of Chester County
Family Stations Radio
First Baptist Church of Passtown
First Presbyterian Church
First West Chester Fire Company
Folds of Honor
Forgotten Cats
Forks of the Brandywine Evangelical Presbyterian Church
Foundation at Great Valley
Foundation for Lee County Public Schools
Fox Chase Cancer Center

Friends Association for Care & Protection of Children
Friends Home in Kennett Square
Friends of Springton Manor Farm
Friendship Ministries Foundation
Garage Community & Youth Center of Kennett Square
Garage Community & Youth Center West Grove
Girl Scouts of Eastern Pennsylvania
Girl Scouts of Freedom Valley
Global Aid Network
Good Fellowship Ambulance
Good Neighbors Home Repair
Good Samaritan Shelter
Good Will Fire Company
Good Works
Great Valley High School After Prom
Green Valleys Association
Grimes A.M.E. Church
Growth Ministries
Habitat for Humanity of Chester County
Haiti Partners
Handi-Crafters
Harvey Kaufman Memorial Scholarship Fund
Headstrong Foundation
Heifer International
Henderson High School
The Hickman
Hillsdale High School Alumni Association
Historic Kennett Square
Honeybrook Food Pantry
Hope Springs Equestrian Therapy
House of His Creation
Housing Authority of Chester County
IHS Global
Interfaith Housing Assistance Corporation
International Rescue Committee
J. Wood Platt Caddie Scholarship Trust
Jascha Heifetz Society
Jenner's Pond
Jesuit Center at Wernersville



Joseph & Sarah Carter CDC
Junior League of Philadelphia
Justice Rescue
Kendal-Crosslands Communities
Kennett After-School Association-After the Bell
Kennett Area Community Services
Kennett Area Park Authority
Kennett Area Senior Center
Kennett Fire Company #1
Kennett Flash
Kennett Public Library
Kennett Symphony of Chester County
Kennett Underground Railroad Center
King's Academy
Kutztown University Foundation
La Comunidad Hispana
Lancaster Bible College
The Land Conservancy of Southern Chester County
Lebanon Valley Bretheran Home
Lifeline Family Center
Lighthouse Youth Center
Little Kids Rock
Living Beyond Breast Cancer
Living Breath Foundation
London Grove Friends Meeting

Lord's Pantry of Downingtown
Lyme Disease Association of SE PA
Magee Rehabilitation Hospital Foundation
Maternal & Child Health Consortium
Metro Lacrosse
Mill at Anselma Preservation Educational Trust
Musicopia
Napa Valley College Foundation
Narberth Ambulance Corp
Natural Lands Trust
Nature Conservancy
Neighborhood Bike Works
New York City Relief
New York Leadership Center
New York Yacht Club Foundation
NOPE Task Force
Nottingham County Park
Open Hearth
Orion Communities
Otho Davis Scholarship Foundation
Owen J. Roberts Middle School
Oxford Area Neighborhood Services Center
Oxford Church of the Nazarene
Oxford Senior Center

PA State Police Camp Cadet of Chester County
Paoli Hospital Foundation
Parkesburg Library
Parkesburg Point
Partners in Outreach
Peacemaker Center
Pearce Middle School
Peirce College
Penn State Brandywine
Penn State Cooperative Extension
Pennsylvania Home of the Sparrow
Pennsylvania Wounded Warriors
Petra Community Housing
Philabundance
Phoenixville Area Children's Learning Center
Phoenixville Area High School
Phoenixville Area Middle School
Phoenixville Community Education Foundation
Phoenixville Community Health Foundation
Phoenixville Women's Outreach - The House
Planned Parenthood of SEPA
Police Athletic League of Philadelphia
Pottsgrove Middle School
Pottstown Cluster of Religious Communities
Power of Play Charitable Fund
Power of Positive Thinking Foundation
Primitive Hall Foundation
Priority One Foundation
Project Home

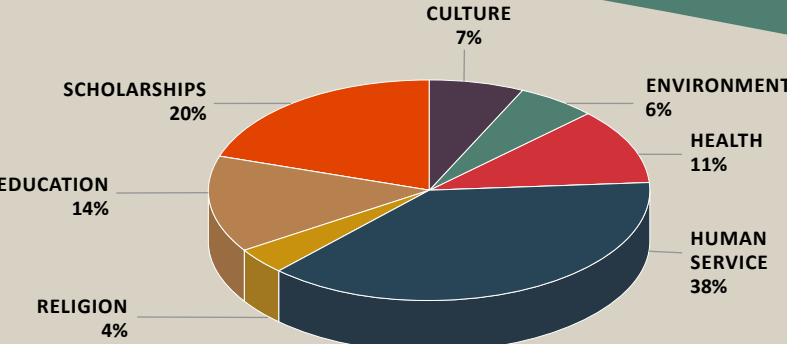
Public Safety Training Foundation
Quaker City Farmers Redeem
Riddle Health Care Foundation
Rowan University
Sacred Heart Church
Safe Harbor
Saint Elizabeth Special Projects Fund
Saints Philip & James School
Salvation Army of Greater West Chester
Salve Regina University
Samaritan's Purse
SE PA Autism Resource Center
ServeNow
SILO
Sisters of the I.H.M.
Snow Scientific Research Foundation
St. Bernard's School
St. Edmond's Academy-Alumni Gymnasium
St. Mary's Franciscan Shelter
St. Paul's Baptist Church
St. Peter's Hospital Foundation
Stroud Water Research Center
Surrey Services for Seniors
Susan G. Komen Breast Cancer Foundation
Temple University
Thirteen/WNET
Thorncroft Equestrian Center
Tick Tock Early Learning Center
Timber Creek High School
Tomorrow Fund
Transition Dynamics Associates
Trustees of the University of Pennsylvania

TV 12-WHYY
UCLA Foundation
United Way of Southern Chester County
University of PA School of Veterinary Medicine
University of Pennsylvania - Fels Institute of Government
Upland Country Day School
Uptown Entertainment Alliance
Villanova University
Volunteer English Program
The Walden School
Washington Gorge Action Programs
WC Atkinson Memorial Community Service Center
West Bradford Youth Athletics
West Chester Area Senior Center
West Chester Dance Works
West Chester Downtown Foundation
West Chester Food Cupboard
West Chester Parks and Recreation
West Chester Police Department
West Chester Public Library
West Chester University Foundation
West Fallowfield Police Department
Westtown Goshen Rotary Foundation
Wetlands Institute
Wharton Esherick Museum
William Alanson White Institute

Williamson Free School of Mechanical Trades
Willistown Conservation Trust
Willistown Friends Meeting-Educational Fund
Wings for Success
Wistar Institute
Women's Club of Downingtown
Women's League for Minority Education
Wounded Warrior Project
YMCA Jennersville



YMCA Kennett Area
YMCA of Eastern DelCo Community
YMCA of Greater Brandywine
YMCA Wilkes-Barre
Young Life Liberty Region
Young Life of Richmond-West End
Young Life of Southern Chester County
Young Moms
Young Playwright's Theater



**CCCF GRANTS & SCHOLARSHIPS
DISTRIBUTED \$2.5M
7/1-6/30**

Legacy Philanthropy Awards

DOOR OPENER AWARD
bestowed upon stellar professional advisors who take the initiative to bring legacy philanthropy to the attention of their clients and colleagues

The Community Foundation Door Opener Award recognizes professional advisors who support and encourage legacy philanthropy. During the past few years, two advisors opened substantially large doors to philanthropy. Their Door Opening stories are interwoven within the Daley Family Foundation highlighted in this annual report.

JOHN R. TWOMBLY, JR., ESQ.

John R. Twombly, Jr., Esquire has a thriving law practice on Street Road in Kennett Square, focused on estate planning, estate administration, and trust administration.

“We’re pretty busy here, all the time,” notes John. “Two years ago we brought on John Michael Pelet, III, Esq., because we needed another hand. All we do is estate-related work, so philanthropy comes up for discussion quite a bit around our practice, between generation skipping tax discussions and inheritance tax planning. We like to encourage philanthropy. For some families, it is exactly what they desire in their estate planning.”

Law Office of John R. Twombly, Jr., Esq.
224 East Street Road, Suite 1
Kennett Square, PA 19348
www.jtwomblylaw.com



John Michael Pelet, III, Esq., John R. Twombly, Jr., Esq., and Amy Neely Hughes, Paralegal

MICHAEL F. CONNELLY

Managing Director - Investment Officer
Connelly & Moore Wealth Management Group
of Wells Fargo Advisors

With over 20 years of experience in the investment industry, Michael Connelly has extensive experience in retirement, fixed income and estate investment planning strategies. A seasoned investment professional, he works closely with clients to review their current financial situation and to build a balanced investment portfolio which corresponds to their present financial needs and future goals.

Michael holds a business degree from St. Joseph’s University. He has passed the Series 7, Series 3, Series 63, and Series 65 exams. Before joining Wells Fargo Advisors, Michael worked at Shearson Lehman Brothers, Legg Mason and Smith Barney where he developed a training program for Financial Consultants.

Maintaining a strong sense of community is very important to Michael. In addition to being a member of the Finance Committee at St. Maximilian Kolbe Church where he is a parishioner, Michael has coached youth travel ice hockey and the West Chester Rustin High School Golf Team. He recently founded the Scholastic Golf Tour which gives high school students the opportunity to gain experience in competitive golf tournaments. Michael lives in Thornton, PA with his wife, Kathleen, and their five children.



Connelly & Moore
Wealth Management Group of
Wells Fargo Advisors
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Newtown Square, PA 19073
www.connelly.wfadv.com/Michael-F---Connelly.e100157.htm

Michael F. Connelly, Douglas R. Moore, David Correale Jr., CFP®, Nicole Maltese, Marian P. Marcus, George C. Pilallis, Margaret M. Todd, CFP®, CLU®, Denise A. Wine



Door Opener Honorees

2004	Stephen McGann, CTFA, AEP	2010	William J. Gallagher, Esq.	2014	Louis N. Teti, Esq.
2005	L. Peter Temple, Esq.	2011	Duke Schneider, Esq.	2015	Kurt Kunsch
2006	Michael B. Karwic, CFP, CRPC	2012	Robb S. Frees, CIC	2016	Michael F. Connelly
2007	David M. Frees, III, Esq.	2013	Richard Clark, CPA, CFP®, ChFC®	2016	John R. Twombly, Jr., Esq.
2008	John A. Featherman, III, Esq.	2013	Stephen Olsen, Esq.		
2009	Honorable Dr. Clifford DeBaptiste	2013	Timothy Knauer, Esq.		

Jordan Award Honorees

The Jordan Award was created in 1999 to honor the longstanding commitment to Chester County philanthropy exemplified by Community Foundation founder Dr. Henry A. Jordan and his wife Barbara McNeil Jordan.

Each summer, Jordan Award winners meet to choose the next honoree. Nominations from the field are strongly encouraged, to help the Community Foundation highlight philanthropic good works that significantly improve the quality of life in Chester County.

2000	Elizabeth Ranney Moran of Paoli	2009	Jennifer & Robert McNeil of Coatesville
2001	Gordon B. Hattersley, Jr. of Berwyn	2010	The Herr Family of Nottingham
2002	Aaron J. Martin of Kennett Square	2011	Jacqueline & Martin Clompus of West Chester
2003	Charles Lukens "Skip" Huston, III of Chester Springs	2012	Wiggie & John Featherman of West Chester
2004	Penelope "Penny" Wilson of Malvern	2013	Albert W. Eastburn of Coatesville
2005	David M. Frees, Jr. of Phoenixville	2014	Richard Kunsch of Phoenixville
2006	Moira & Kenneth Mumma of Chester Springs	2015	Alice & Rodman Moorhead III of West Grove
2007	Eva L. Verplanck, Ph.D. of Kennett Square	2016	W. Thomas Musser of Kennett Square
2008	Carol Ware, Ph.D. of Christiana		



Dr. Henry A. & Barbara M. Jordan Award

significant, longstanding, comprehensive philanthropic achievements



W. THOMAS MUSSER

“Always be thankful; never be satisfied.”

How and why does one fit community service into their life, balancing their responsibilities to family and friends, while transforming a two-man enterprise into a leading-edge company serving the likes of DuPont, Barclay Card US, QVC, and Exelon? **Tom Musser’s life story illuminates the way.**

Wilmor Thomas Musser was born in West Chester in 1934. From the beginning he was dubbed Tom. The oldest of three boys (Tom, Dick and Harry), he grew up in Pocopson Township.

The day after Pearl Harbor was bombed, his father Wilmor G. Musser enlisted in the Navy and spent the next four years serving his country in the Pacific. While Tom’s father was away, Tom went to live with extended family who ran a small boutique hotel in St. Petersburg, Florida. This gave young Tom his **first taste of entrepreneurialism**.



After Tom’s father was discharged in 1945, he moved back with his family in Chester County and settled in Wawaset. Tom attended Unionville High School. He worked odd jobs for local farmers and helped tend the lawn and gardens of a neighbor’s estate. Upon his 1952 high school graduation, Tom started his first “real” job at Lukens Steel in Coatesville. Some days Tom would stay at the plant beyond his shift just to see what would happen next in the steel making process.

Tom quickly found that while **he loved big industrial plants, he wanted more flexibility** with his workday schedule. He moved on to work with several electrical contractors. As business slowed down in 1956, Tom decided to visit his aunt in Florida. On a whim he took a detour to explore the University of Florida campus.

He ended up walking into the Dean of Admissions office, telling them that he wanted to enroll. A few weeks after this spur of the moment visit, Tom was accepted into college.

Tom financed his own college education. By his third year of school, he ran out of money. Since it was 1959, he knew he was a prime Army draftee for the Korean War. **Tom took the bull by the horns.** He followed in his father’s footsteps and joined the Navy, serving as air traffic controller on the USS Shangri-La carrier operating in the Atlantic Fleet.

After serving the Navy for three years, rather than return to college Tom opted to work for an electrical contractor in Kennett Square. Over a few years, Tom became an Electrical Estimator & Project Manager. He **noticed that there was a niche not being addressed: industrial electrical contracting**. Most of the region’s electrical contractors were residential contractors; they didn’t really specialize in industry.

In 1964, Tom had an event-filled few days:

On Friday night, he **quit his job with the electrical contractor**.

On Saturday morning, he **married Bonnie Anderson**.

On Monday morning, he **founded Tri-M with his brother Dick**.



Tri-M was almost an enterprise that didn’t get off the ground. Tom and Dick Musser were so anxious to get started that on the first day they forgot to tie their ladder down to their truck. When they got to their first job site, the ladder was missing. A farmer saw the ladder come off the truck, picked it up and returned it to the brothers. “Good fortune smiled on Tri-M that day, as it has ever since,” the company wrote in a brief history about its beginnings.

In 1972, Tom became the sole owner and incorporated the company. As the years passed **Tri-M grew** to include more than **Electrical Construction**, adding specialized teams included **Building Automation Systems, Security Network Services** and **High Voltage**.

In service to his industry, Tom held leadership positions with the Associated Builders and Contractors, including serving as National Chairman. He also served as Chairman of the Board of the National Federation of Independent Business, a 325,000-member association of small and independent business owners across the USA.

In service to his country, Tom served as Vice Chair of the U.S. Naval Institute Foundation Board of trustees and on the Department of Defense Advisory Board for Employer Support of the Guard and Reserve.

Tom **testified several times before Congress** for business and construction issues, and he **met with U.S. President George W. Bush** on three different occasions, in reference to issues facing independent businesses.

As Chairman and Co-Founder of an ever-expanding business enterprise, Tom retained his **commitment to the local community**. As an active member of the **Southern Chester County Chamber of Commerce**, he rose to serve as a Board member, and Board President.

For decades, Tom served as an active Rotarian. In 1986 he became President of the Kennett Square Rotary Club (now Rotary at Longwood) and was recognized as a Paul Harris Fellow. **Rotary’s motto, “Service Above Self,”** resonated deeply with Tom.

In 1996, Tom agreed to **Chair the Capital Fund Drive of the Kennett-Unionville YMCA**, successfully organizing and inspiring the team of volunteers to raise \$5.2 million. “I’ve never seen anything like it,” marvels Aaron Martin. “It was a terrific experience to volunteer with Tom. His energy and his drive were inspiring, and his commitment for the community Y was whole-hearted.”



By 1998, it was decided to **sell Tri-M to a public company**. However, it was not for long. In Tom's own words, "After a couple years, **I did not like how the customers nor the employees were being treated** so I decide to do something about it. **I bought Tri-M back.**" Tom asked Jim Horn, a good friend and former Tri-M employee, to join Tom as co-owner of the company and take the position of CEO. This put a leadership succession plan in place. Today there are three owner partners; Jim Horn, Chris Peirson and Ron Bagues, Tom's son-in law. Tom's children, Traci Musser Bagues and Thomas H. Musser, continue to work at Tri-M, which currently has over 400 employees, 5 office locations and hundreds of long-term customer relationships.

With Jim Horn at the helm of The Tri-M Group, Tom knew that the business was in good hands. Tom made a concerted decision to more extensively **share his business savvy from the for-profit arena with the non-profit arena**.

In 2007, with his previous capital fund drive success under his belt, Tom agreed to Co-Chair another drive. Alongside John A. Featherman, III, Esq., they raised over \$30 million for the **Chester County Hospital Capital Campaign**. "Tom was epic," enthuses John. "He made sure the volunteer fundraisers deeply understood the need, by making sure we toured stellar hospitals. Our dreams became reality as the funds were secured." With funds raised in the Capital Campaign, the hospital added a new wing; consolidated all cardiovascular services into a single location; added 48 state-of-the-art patient rooms; added additional operating and procedural rooms; and increased efficiencies in the Emergency Department.



A year after the Hospital's new wing was completed, the **Kennett Area YMCA** came calling again. It had been two decades, and expansion was needed. Tom once again chaired the Kennett Area YMCA Capital Campaign, this time raising \$3 million.

Not only did Tom personally give back to the community, he also felt that **Tri-M should contribute**. Tri-M **encourages employees to volunteer their time and expertise; donates in-kind services; and contributes funds**. Jim Horn is clear: "It's always been the right thing for Tri-M to do."

Tri-M has **donated electrical installations** to numerous nonprofits, including the Kennett Area YMCA, Kennett Area Senior Center, and Unionville Quarterback Club Fitness Room. Tri-M erected the Unionville High School Baseball Scoreboard and donated testing equipment to Stroud Water Research Center.

Each year Tri-M sponsors students at the **PA Free Enterprise Week**, a unique summer program that offers high school students a challenging opportunity to see what it is like to run their own business.

Tri-M contributes employee volunteer time and corporate donations to scores of regional causes, focusing on **civic engagement, community health, youth, fitness, education and the environment**. This includes, but is not limited to:

American Cancer Society – Relay for Life
Anson Nixon Park
Chester County Futures
Clinton County Economic Partnership
Downtown Lock Haven
The Garage Youth Center
Historic Kennett Square
KAU Little League
Kennett Area Community Services
Kennett Area Senior Center

Kennett Education Foundation
Kennett Fire Company
Kennett Lions Club
Kennett Run Charities
Kennett High School After-Prom
La Comunidad Hispana
The Land Conservancy of Southern
Chester County
Longwood Fire Company
Longwood Rotary Foundation

March of Dimes
The Mushroom Festival
Officer Phil Child Safety Program
PoMarLin Fire Company
Special Olympics
THON Penn State
Toys for Tots
Unionville Community Fair
Wayne Township Fire Company
YMCA



In April 2016, Tom was inducted into the **Chester County Business Hall of Fame** by the Chester County Economic Development Council, recognizing Tom's **outstanding endeavors and achievements in the business community**.

In June 2016, Tom learned that the Community Foundation had chosen him as the **2016 Jordan Award winner, in recognition of his longstanding commitment to community philanthropy**.

In July 2016, after a brave battle with brain cancer, Tom passed away at his home surrounded by family.

J.M. Herr echoes the sentiments of fellow Jordan Award committee members: "Tom was a trusted friend and mentor to many. An energetic, insightful entrepreneur who developed a small business idea into an enormously successful one, **Tom cared about his family, his employees, his friends, his church, and the community.**"

Jeffrey Wright summed it up in Tom's memorial guestbook: "Tom was truly a **pillar of the community he served**. A quiet spoken man who spoke loudly by way of his **loving and generous actions**... Those who have enjoyed a mentoring relationship under Tom's guidance received a gift that was **priceless**. I can't help but think Tom is now focused on ensuring that Heaven is properly wired."

Tom Musser's legacy will continue to live on in the hearts and minds of the people he touched, for generations to come.

Ron & Traci Bagues, Tom & Bonnie Musser & Tom H. Musser at Tri-M's 50th Anniversary Celebration

Tom Musser had one simple philosophy that served him well his entire life:

Always be sure to help out the community where you live.

~ Bonnie Musser



Funds

The Community Foundation currently is entrusted with **342 funds**.
The **15** newest funds are in **colored print**.
The average endowed fund size is **\$135,000**.
Noted after each fund is its inception date.



CCCF FUNDS

CCCF Adler Legacy Fund Honoring Eva L. Verplanck, Ph.D., 2006
CCCF American Cancer Society Endowment Fund, 1998
CCCF Annuity Fund, 2002
CCCF Arts Forever Fund, 2005
CCCF Benjamin Franklin Trust, 1995
CCCF BizOnBoard Program Design, 2016
CCCF Board of Trustees Institute, 2013
CCCF Brandywine Conservancy Lincoln Building Monitoring Fund, 1999
CCCF CardConnect Giving Circle Grantmaking Funds, 2016
CCCF CardConnect Giving Circle Member/Operating Fund, 2016
CCCF Delno C. Large & Dennis C. Large Memorial Foundation, 2005
CCCF Diane & Thomas Lafferty Fund-Benefit Wistar Institute, 1999
CCCF Fund For Coatesville, 2000
CCCF Grantmaking Fund for ChesCo Honoring Richard I.G. Jones, 2007
CCCF Grantmaking Fund for Chester County Environment, 2001
CCCF Grantmaking Fund for Chester County, 1998
CCCF HARB Gettysburg Address Contest, 2004
CCCF Jordan Award Fund, 2001
CCCF Josiah Hibberd Award Honoring Margeretta Durnall Hibberd, 2013
CCCF Lincoln Biography Building Endowed Fund, 1996
CCCF Madalene Hayes Conner Scholarship Foundation, 2003
CCCF NP C4 Capacity Building Fund, 2010
CCCF NP Peer Learning Circles for Development Managers, 2014
CCCF NP Peer Learning Circles for Executive Directors, 2014
CCCF NP Peer Learning Circles for Planned Gift Managers, 2014
CCCF Operating Endowment Honoring Frances Richards Pyle, 2012
CCCF Operating Endowment, 2001, 2012
CCCF Operating Fund, 1994
CCCF PLAN Giving Circle Grantmaking Funds, 2016
CCCF PLAN Philanthropy Learning Action Network, 2016
CCCF Summer Fundraising Fund, 2013

CCCF Sweet Charity, 2013
CCCF West Chester Optimist Scholarship Fund, 2011
CCCF West Chester Trust & Relief Endowed Fund, 2000
CCCF William & Anne Evans Jr. Grantmaking Fund, 2013
CCCF William & Anne Evans Jr. Operating Legacy Fund, 2013
CCCF YWCA Chester County Scholarship Fund, 2010

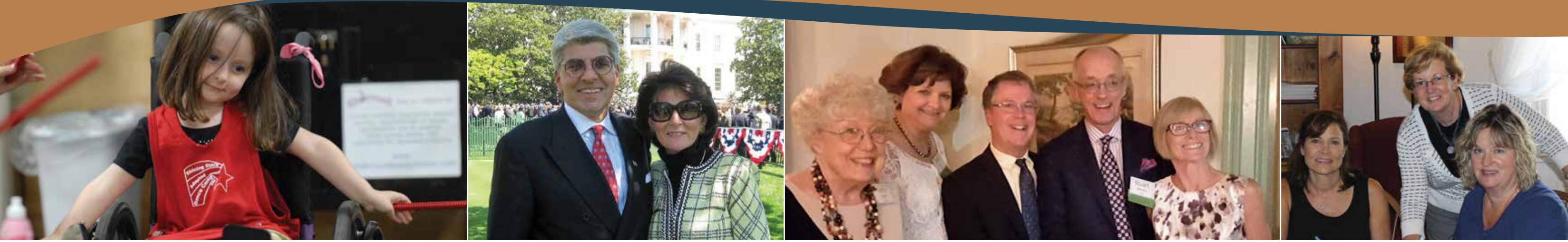
DONOR ADVISED FUNDS

Anonymous (2)
1002 Fund, 1999
4Kids2C Charitable Fund, 2010
Aaron & Jean Martin Fund, 1994
Amy Elizabeth Drobish Foundation, 2010
Anne & Gus Teipelke Charitable Legacy Fund, 2013
Anne Stroud Hannum Charitable Fund, 1998
Barney Harahan Memorial Foundation, 2002
Barrie Stavis Foundation, 2002
Baxter Family Foundation, 2014
Baylus & Deborah Francis Charitable Fund, 2002
Beccaria Charitable Fund, 2006
Believe, Play & Have Fun Foundation, 2015
Bradley Hughes Foundation, 2009
Bugel Family Foundation, 1998
Capacity for Change Fund, 2008
Carl & Sylvia Landis Foundation, 2012
Caroline Manning Bolton Legacy Fund, 2002
Chain of Love Foundation for Turner Syndrome, 2004
Champlain Social Ministry Foundation, 1999
Chase Your Dream Foundation, 2007
ChesCo Fund for Teacher Support, in Memory of Taylor Patterson Crane, 2007

Clay-Mir Charitable Foundation, 2011
Connor T. Schmidt Foundation, 2001
Daley Family Foundation, 2015
Daryl E. & Martha J. Thomas Foundation, 2002
DeBaptiste Foundation, 2010
Di & Dallas Krapf Foundation, 1999
Dianne & Dave Elderkin Charitable Fund, 2013
Dick & Jane Kunsch Family Foundation, 2014
Diederich Family Foundation, 2007
Doe Run Charitable Fund, 2005
Don Gregory Stout Memorial Outreach Endowed Fund, 2014
Edward H. & Dorothy K. Dickol Foundation, 2006
Elizabeth Bove Foundation, 2013
Emily's Dash Foundation, 2012
Eric Miller Memorial Charitable Fund, 2016
Everett Frank Legacy Foundation, 2000
Farnesi Family Foundation, 2000
Featherman Family Foundation, 2006
Francis J. Snyder Foundation, 2007
Frees Family Foundation, 1998
Ginger English/Christopher Fuga Memorial Foundation, 2007
Good Fight Foundation, 2005
Hadley Fund, 2016
Hailey Bear Memorial Fund, 2016
Happy Romar Fund of Chester County, 2000
Harry & Aggie Tyler Can-Do Foundation, 1999
Heart in Hand Partnership Endowed Fund, 2000
Helen & Paul Breitegam Charitable Fund, 2003
Helen & Robert Whittaker Memorial Trailhead Park Foundation, 2011
Hennigan Family Foundation, 2007
Hockman Family Foundation, 2012
Hollenbach Family Foundation, 2000
Honorable Dr. Clifford DeBaptiste Church Foundation, 2014
Hutton Family HeLP Fund, 2000
I Scream for Elephants Charitable Fund, 2011
Ilex Charitable Fund, 2012
J. M. & Lois B. Herr Family Foundation, 1998
Jack C. Griest Charitable Fund, 2013
Jeffrey Robert Drobish Foundation, 2010
Jeremy P. Wilson Foundation, 2010
Jessie L. & Harold W. Freeman Foundation, 2011
Jim Decker Compassion Ministry Charitable Fund, 2002
Joan & William Walkup Family Foundation, 1999
John & Heather Harrison Family Fund, 2010
John Eirkson & Kathy Ryan Esq. Charitable Fund, 2009
John H. Phillips III Memorial Fund for Horseshoe Scout Reservation, 2000
Jordan Family Fund for Chester County, 1998
K&M Foundation, 2003
K9s4kids Charitable Fund, 2010
Kathleen McBratnie Memorial Foundation, 2004

Kelly Family Foundation, 2012
Kennedy Marie Canzoneri Memorial Fund, 2016
Kevin Holleran Charitable Fund, 1999
Koester Family Foundation, 2000
Krapf Family Foundation, 1999
The Lark Fund, 2012
L.E.G. Up Charitable Foundation, 2007
Lacy Charitable Fund, 2014
Laudenslager Family Foundation, 2011
Laura Meikle Koch Memorial Legacy Foundation, 2008
Liddick Family Foundation, 2007
Lockwood Family Foundation, 2007
Loew Family Foundation, 2007
M & M Foundation, 2001
Manor Avenue Charitable Fund, 2014
Margaret E. Coppedge Memorial Fund to Benefit Grimes AME Church, 2005
Margaret S. DeVinney Foundation, 2011
Marjorie L. & Arthur P. Miller, Jr. Charitable Fund, 1998
Marvin & Shirley Porter Educational Foundation, 2009
Matthew 18:20 Fund, 2012
Mesothelioma and Asbestos Disease Society Charitable Fund, 2004
Moretzsohn Family Foundation, 2000
Mr. & Mrs. Robert P. Moran, Jr. Family Foundation, 2010
Nannette & Dale Krapf Foundation, 1999
Newlin Foundation, 2010
Next Step Charitable Fund, 2014
Nick Smiles on the Fine Arts Foundation, 2010
Niles-Milner Fund for Student Travel, 2004
Orchard Charitable Fund, 2001
P.G. Thomas Charitable Legacy Foundation, 2009
Patricia C. & John Celii, Jr. Foundation, 2007
Pay It Forward Fund, 2014
PFF Charitable Fund, 2000
Pink House Foundation, 1998
Put Your Money Where Your Mouth Is Foundation, 2009
Quigley Family Foundation, 2012
RE/MAX Main Line Charitable Foundation, 2006
Reading Family Foundation, 2014
Rev. William J. Fischler Memorial Cursillo Foundation, 2007
Richard & Carolyn Vermeil Foundation, 2010
Richard & Lois Hodgson Charitable Fund, 1998
Rigg Family Foundation, 2011
RJ Hogga Foundation, 2014





Robert & Jennifer McNeil Charitable Fund, 2002
Robert M. Price Memorial Foundation, 2004
Robert Olin Niles Memorial Foundation, 2010
Robert Wiley Miller Memorial Foundation, 2000
Romig Road Victory Run Foundation, 2008
Ruch Family Foundation, 2011
Samantha Lee Zajac Memorial Foundation, 2001
Sarnacki Family Foundation, 2014
Schwartz Family Foundation, 2001
Shobaken Family Foundation, 1998
Spurlino Family Foundation, 2006
St. Ann Rose Charitable Fund, 2000
Stamm Consultancy Charitable Fund, 2016
Stanley's Dream Charitable Endowment Fund, 2007
Stephen Chandler Ericson Memorial Foundation, 2011
Sunday Foundation, 2012
Susan Groome Harney Memorial Foundation, 2000
T&G Charitable Fund, 2005
Teresa V. Garofalo VMD Memorial Scholarship Fund, 2011
Terry Muzzy Scholarship Foundation, 2007
Teti Family Foundation, 2006
Tom & Betty Hess Charitable Fund, 2014
Trajabay Charitable Fund, 2005
Tres Foundation, 2003
Tyler Family Foundation, 2005
Valerie Lamb Smith Art Foundation, 1998
Vaughan Family Foundation, 2000
William S. Latoff Charitable Foundation, 2016
Woody's Woods Memorial Foundation, 2003
Zelinda LeBoutillier Charitable Foundation, 2011

FIELD OF INTEREST FUNDS

Adolescent Awareness Foundation, 2012
Coatesville Community Health Foundation, 1999
Friends of Chester County Seniors Fund, 2010
Imprints Grantmaking Endowment Fund, 2009

International Equine Conf on Laminitis & Diseases of Foot, 2008
Neil Joines Fund, 2013
Parkesburg Environmental Foundation, 1998
PCHF Community Health Leadership Academy Fund, 2014
PCHF Executive Leadership Institute Fund, 2014
Rammies Fund, 2016
Spot Castle Foundation, 2003
West Chester Walk of Fame Foundation, 2013
Whitford Charitable Endowed Grantmaking Fund, 2014
Whitford Charitable Fund Merriman Golf Outing, 2016
Whitford Charitable Fund, 2011

FISCAL AGENT-INTERIM FUNDS

Chester County Estate Planning Council Fund, 2005
Decade to Doorways Charitable Fund, 2013
Friends of Hershey Mill Dam Charitable Fund, 2011
Land and Water Resources e-Institute Charitable Fund, 2007
Oxford Arts & Culture Center Charitable Fund, 2011

NONPROFIT ENDOWMENT FUNDS

ARC of Chester County Endowment Fund, 2000
Bishop Shanahan High School Endowment Fund, 2002
Bournelyf Special Camp Endowment Fund, 2005
Brandywine Valley Association Endowment Fund, 2005
Camphill Special School Endowment Fund, 2005
Canine Partners for Life Endowment Fund, 1999
Chester County Art Association Endowment Fund, 1999
Chester County Council Boy Scouts of America Endowment Fund, 2013
Chester County Fund for Women and Girls Grants Endowment, 2001
Chester County Fund for Women and Girls Operating Endowment, 2001
Chester County Futures Endowment Fund, 1999
Chester County Library Endowment Fund, 1999
Chester County S.P.C.A. Endowment Fund, 2005
The Clinic Endowment Fund, 2007

Coatesville Community Education Foundation Endowment, 2009
Community Coalition Quasi-Endowed Fund, 1999
CVIM Edgar R. Lawrence, DDS Dental Endowment Fund, 1999
CVIM Gordon B. Hattersley, Jr. Endowment Fund, 1999
Daemion Counseling Center Endowment Fund, 2004
Devereux Foundation Endowment Fund, 2008
Domestic Violence Center of Chester County Endowment Fund, 2007
Easttown Library Foundation Endowment Fund, 2011
Family Service of Chester County Endowment Fund, 2008
French & Pickering Creeks Conservation Trust Endowed Fund, 2013
Friends of Anson B. Nixon Park Endowment Fund, 1999
Good Works Endowment Fund, 2002
Great Valley Nature Center Endowment Fund, 2002
Greater West Chester Rotary Foundation, 2013
Green Valleys Watershed Association Endowment Fund, 2014
Habitat for Humanity of Chester County Endowment Fund, 2002
The Hickman Endowment Fund, 2004
Home & Farm Antique Association Restricted Endowment Fund, 2000
Home and Farm Antique Association Unrestricted Endowment Fund, 2000
Interfaith Housing Assistance Corporation of Chester County Endowment Fund, 2014
Jenner's Pond Resident Charitable Endowment Fund, 2001
John Rock Memorial Foundation, 2004
Kennett Area Senior Center Endowment Fund, 2013
Kennett Symphony of Chester County Endowment Fund, 2006
Kerr Memorial Park Endowment Fund, 2010
Kiwanis Club of Phoenixville Endowment Fund, 2001
La Comunidad Hispana Honorary Endowed Fund, 2013
The Land Conservancy for Southern Chester County Endowment Fund, 2014
The Land Conservancy for Southern Chester County Land Endowment Fund, 2014
Lions Club of Kennett Square Endowment Fund, 2001
Longwood Rotary Club Scott Thompson Education Award, 2008
Lundale Farm Endowment Fund, 2013
Maternal & Child Health Consortium Endowment Fund, 1998

Mayor Clifford E. DeBaptiste Educational Endowment for WCU, 1998
Mill at Anselma Preservation and Educational Trust Foundation, 2003
Parkesburg Free Library Endowment Fund, 1996
Paul Hassenplug Educational Fund of the Rotary, 1999
Pennsylvania Home of the Sparrow Endowment Fund, 2006
Phoenixville Community Education Foundation Endowment Fund, 2006
Phoenixville Public Library Foundation Endowment Fund, 1999
Planned Parenthood of SE PA Endowment Fund, 1995
Primitive Hall Endowment Fund, 1996
Priority One Foundation Endowment Fund, 2004
Quest Therapeutic Services Endowment Fund, 2011
S.A.V.E. Endowment Fund, 2010
Safe Harbor of Chester County Endowment Fund, 2016
Stroud Water Research Endowment Fund, 1997
Thorncroft Endowment Fund, 2010
Thorndale Rotary Jay Edge Community Service Award, 2009
United Way of Chester County Endowment Fund, 1998
United Way of Southern Chester County Endowment Fund, 2004
Volunteer English Program Endowment Fund, 2015
W. Marshall Schmidt Endowed Fund for Childrens' Country Week, 1998
West Chester Downtown Foundation Grantmaking Endowment, 2014
West Chester Downtown Foundation Operating Endowment Fund, 2004
West Chester Downtown Foundation Up On the Roof Fundraiser, 2013
West Chester Friends School Endowment Fund, 2006
West Chester University Library Endowment Fund, 1998
West Goshen Lions Club Endowment Fund, 1998
Wharton Esherick Studio Preservation Endowed Fund, 2001
Wharton Esherick Studio Site Maintenance Endowment Fund, 2011
Wharton Esherick Studio Woodworking Award Endowment Fund, 2012
William S. West Memorial Fund for Petra Community Housing, 2000
Willistown Conservation Trust Endowment Fund, 2013
Woman's Club of Downingtown Endowment Fund, 2003
YMCA of Greater Brandywine Endowment Fund, 1999

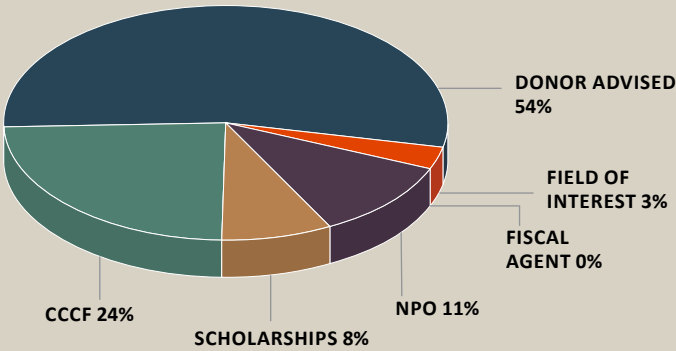


SCHOLARSHIP FUNDS

- Alice Lawson Scholarship Fund, 1998
- Alice M. Thomas Scholarship Fund, 1998
- Brian Kadunc Memorial Scholarship Fund, 2016
- Brianne Carter Memorial Scholarship Foundation, 1999
- Carl O. Benner Scholarship Foundation, 2001
- Carl Schnellenbach Wrestling Scholarship Fund, 2001
- Caroline Gallagher Cranston Memorial Scholarship Fund, 2011
- CCEPC Marc P. Riddell Memorial Scholarship Fund, 2010
- Charles A. Melton Scholarship Fund, 1999
- Charles R. White Scholarship Fund, 1999
- Coach Millard Robinson Memorial Foundation, 2001
- Constance & Michael Briglia Memorial Foundation, 2006
- Dana Marie Carr Memorial Scholarship Fund, 2000
- Dr. Alan G. Elko Legacy Scholarship Fund, 2008
- Dr. Gerald E. Clark Memorial Scholarship Foundation, 2008
- Dr. John H. Hewlett, III Scholarship Fund, 1999
- Dr. Robert & Doris Hanna Scholarship Fund, 2003
- Dr. W.T.M. Johnson Memorial Foundation, 1999
- Drew McWilliams, Jr. Scholarship Fund, 1998
- East End Neighborhood Association Scholarship Fund, 2009
- Eleanor & James Latta, Jr. Scholarship Fund, 2013
- Elizabeth G. Dorsett Memorial Scholarship Fund, 2001
- Eugene J. & Mary DiFilippo Scholarship Fund, 1999
- Front Porch Trust Fund Scholarship, 2005
- George W. Martyn, Jr. Scholarship Fund, 2000
- Halliday Clark, Sr. Memorial Scholarship Fund, 1998
- Harry Dunn Art Scholarship Fund, 2001
- Hon. Dr. Elinor & William Taylor Scholarship Fund, 2004
- Jeffrey A. Wheet Memorial Scholarship Fund, 2011
- Jeffrey Gaunt Memorial Scholarship Fund, 2008
- John & Mary DiCecco Scholarship Fund, 1999
- John Hay Memorial Scholarship Fund, 2010
- Joseph J. D'Amico, Sr. Memorial Foundation, 2010
- Julius "Bud" & Dorothy Elberfeld Foundation, 2010
- Kappa Psi Pharmaceutical Fraternity ETA Chapter Legacy Fund, 2013
- Karen L. Mapes Memorial Scholarship Fund, 2013
- Karrlin Field Memorial Scholarship Fund, 2005
- Kelly Ann Foundation, 2013
- Kennett Education Foundation Angel Scholarship Fund, 2009
- Laura Meikle Koch Drexel University Scholarship Foundation, 2008
- Lauren's Heart Scholarship Foundation, 2011
- Leon Bell Scholarship Fund, 2011
- Lucinda P. Wallace Memorial Scholarship Fund, 2002
- Manor Avenue Scholarship Fund, 2014
- Maria Whitehead Memorial Scholarship Fund, 2010
- Natalie A.W. Leaf Charitable Fund, 2001
- Newlin Scholars Foundation, 2010
- Nicholas R. MacElree Scholarship Fund, 2005
- Patricia B. Dixon Scholarship Fund, 2009
- Peoples First Scholarship Fund, 2004
- Quaker City Farmers Scholarship Fund, 2001
- Rotary Club of Coatesville Educational Fund, 1998
- Ruch Family Scholarship Fund, 2011
- Schramm Scholarship Fund, 2005
- Stanley's Dream Scholarship Fund, 2010
- Susan DeCecco Scholarship Fund, 1999
- Sweet Jane's Wish Foundation, 2012
- West Chester Henderson Class of 1953 Scholarship Fund, 2008
- Westtown Goshen Rotary Richard Hodgson Education Foundation, 1999

The minimum contribution to establish an endowed fund is \$25,000 • Average endowed fund size = \$140,000
 Average donor advised fund size = \$155,000 • Average nonprofit endowment fund size = \$115,000

CCCF FAMILY OF AFFILIATED FUNDS % OF ASSETS, 2016



“Gentleness,
self-sacrifice
and generosity

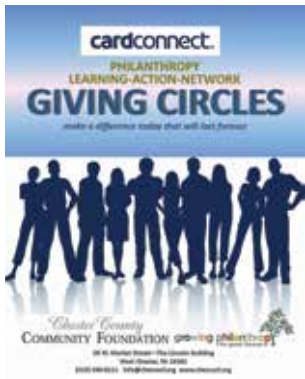
are the exclusive possession
of no one race nor religion.”

~ Mohandas Gandhi

Fund Highlights



CARDCONNECT SMART GIVING CIRCLES



CardConnect is an innovative and rapidly growing payment technology company, where **Silicon Valley meets East Coast frame of mind.**

CardConnect was founded in 2006 by Brian Shanahan, a successful entrepreneur whose career spans more than 20 years in the payment industry. **Since its inception, CardConnect has**

adhered to one mission: to make payments simple and secure. CardConnect marries personalized service with an unrivaled technology platform. Nowadays the company is headed up by brothers Jeff Shanahan, President/CEO and Patrick Shanahan, COO and they have strengthened what their brother Brian started a decade ago.

As a recognized leader in payment security and processing technology, CardConnect takes great pride in its consistently high level of customer satisfaction. Its growing base of 65,000 customers concentrates on growing their businesses while CardConnect makes accepting credit cards as seamless as possible. From youthful startups to Fortune 500 iconic global brands, CardConnect helps businesses **securely process \$20 billion in card transactions each year.**

CardConnect’s leadership **cares about community involvement**, with special attention given to causes in its Greater Philadelphia backyard. CardConnect’s charitable arm, CardConnections was

born in 2015. Notes CEO Jeff Shanahan, “We want to be involved in our community, to make a difference. And also, from time to time our employees discover smaller nonprofits that can really use our technology and equipment to accept donations, but the smaller nonprofits cannot afford the market cost. So, we essentially give away what makes sense, in certain cases.”

CardConnections is broader than in-kind donations of CardConnect’s products and services. The CardConnect team is passionately interested in community issues. “Employees quickly got behind the charitable aspirations. But even though our employees are highly motivated to give back,” notes COO Patrick Shanahan, “we found it was difficult to participate in and manage all of our charitable interests. **We introduced a company policy that allowed employees to take four hours each month to volunteer at non-profit organizations.** But we found that employees weren’t taking advantage of the time out. Soon after, Chester County Community Foundation came into the fold.”

“When our Board Member Patrick South introduced us to CardConnect, we were enthralled with this brilliant company’s **corporate ethic of innovative community engagement,**” explains Community Foundation CEO Karen Simmons. “CardConnect had volunteer release time in place, so employees could engage with nonprofits. The leadership team found that the employees sought assistance finding the right nonprofits to hook up with. They had time, talent and treasure to give. But they wanted some direction and strategy.”

In a series of brief Smart Giving Circle meetings over a few



months, the Community Foundation met with over half of CardConnect’s employees several times. The focus is clear for the Community Foundation: **get as many people as possible authentically engaged in philanthropy,** forging sustainable for-profit/nonprofit partnerships where everyone wins.

“As individuals, we have been involved in nonprofit charities for a long time,” explains CardConnect EVP Angelo Grecco. “But we weren’t quite clear on **how to pick charities that fit CardConnect’s strategic goals, and that would resonate with our own individual desires.** The Community Foundation Smart Giving Circles help us find answers.”

In **Smart Giving Circle** gatherings, employees learn about community issues in the region, discover nonprofit causes that resonate with their hearts and minds, review IRS 990 financial data, and trek on-site to visit the nonprofits in action. After strategically selecting their top nonprofits, employees volunteer individually, in small teams, and in larger groups. A CardConnection e-newsletter highlights monthly volunteer opportunities, and urges employees to schedule volunteer time out with their managers. Individual employees donate pooled funds, and CardConnect matches their donations. After that, Giving Circle members decide what amounts to grant to their priority nonprofits, while the volunteering continues throughout the year.

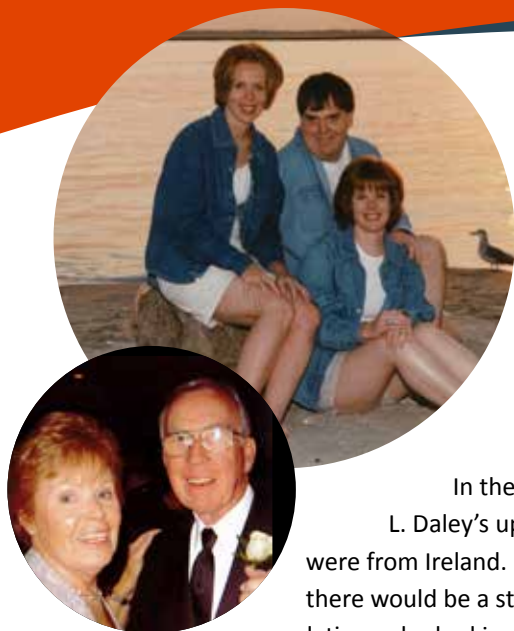
“It’s not just about the money we donate,” explains Human Resources Director Jennifer Ireland. **“It’s about how our employees are involved individually, as a team, and company-wide.** Community Foundation Smart Giving Circles have helped us strategically discern which nonprofit charities to engage with. We have clarified where our employee’s time can be best used in the community. Our employees are better situated to help with **hands-on volunteering, pro-bono consulting projects, and engage as committee members.**”

With the Community Foundation’s assistance, CardConnect explores an array of charities serving causes near and dear to employees’ hearts — from animal rescue centers to environmental advocacy, low-income families and children with cancer, and promoting involvement in the creative economy.



“The Community Foundation gives CardConnect access to a wealth of charities, helping us **discover organizations that weren’t on our radar,**” enthuses Michael Starosciak, Director of Marketing and a Giving Circle Member. “Because of this, the charitable possibilities are endless for our company, which is something we’re thrilled about. I feel fortunate to work with creative, hardworking team members who share a passion for improving the world around us.”

CardConnect CEO Jeff Shanahan sums it up. “Being involved with the community where we live and work is tangible. We get involved, hands-on, and see the difference we can make in our own backyard. This gives our **employees satisfaction,** and it **helps the community** and it **strengthens the company. Win + win + win. Easy decision.**”



DALEY FAMILY FOUNDATION, est. 2015

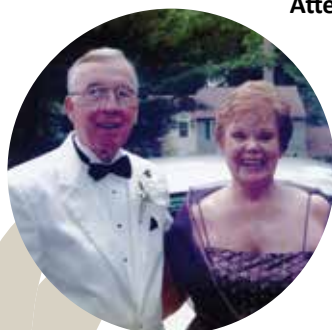
How does one generation pass along its spirit of giving to the next? What changes? What stays the same? The Daley Family Foundation provides some insights.

In the Daley family, **giving to others is an unobtrusively practiced norm**. It started with Charles L. Daley's upbringing. Explains Carol Ann, the youngest of the three Daley siblings: "My Dad's parents were from Ireland. He told us that when he was a child, he would sometimes wake up in the morning and there would be a stranger or two at the breakfast table. The strangers would turn out to be friends or relatives who had just arrived overnight from Ireland. Dad's parents served as sponsors: they opened their home, offered a place to stay, and helped them find their way when they first came to America."

Both Charlie and his wife Janet **grew up in modest-income families** in Philadelphia and Havertown, respectively. Charlie credits his success to the **values instilled into him by his parents**, combined with his **La Salle College degree in accounting**. Given the times and his parents' immigrant status, Charlie had not expected to be able to attend college. Fortune would have it that La Salle sent him an evening division catalog, which prompted Charlie's decision to try to attend college. Although the Korean War paused his educational pursuits, Charlie graduated from La Salle in 1957.

In a 2006 La Salle University feature, Charlie wrote, "To put the La Salle experience into perspective, I have to look at all of my life experiences. It is part of the continuum of how my character developed. My parents instilled in me a good work ethic and good moral values, which were further enhanced by all my educational experiences, from parochial grade school and high school, continuing into college at La Salle. La Salle gave me continued training in the disciplines needed to be successful.

Attention to detail and working hard and effectively still are the hallmarks of my life."



With accounting degree and CPA in hand, Charlie began working in the banking industry. Over the years, Charlie worked his way up to become Executive Vice President and Chief Operating Officer from 1984-1992 at First People's Bank of New Jersey, a state-chartered commercial bank. Concurrently, from 1987-1992, he served as Executive Vice President and COO of First People's Financial Corporation, a bank holding company.

In 1992, Charlie transitioned to TEB Associates, a real estate finance company. From 1995-2005, he also served on the Board of SLM Corporation. At SLM, Charlie's commitment to making higher education dreams come true helped open doors to education for thousands of people.

Charlie's and Janet's **"we don't have much, but give what we can"** upbringing, paired with their success throughout their lives, compelled the Daleys to create a donor-advised fund. They chose a commercial donor advised fund vehicle. And of course, Charlie continued his annual gifts to La Salle. Charlie and Janet were inducted into the De La Salle Society in 2003, when their cumulative lifetime contributions totaled over \$100,000.

Growing up, Charlie and Janet instilled in their children a sense of what they had earned. Also, they quietly modeled philanthropic behavior that made an impression on Karen (Kanya), Charles (Chuck), and Carol Ann. **The three children were used to seeing their parents help others in need.**

Kanya remembers, "Dad heard about a local shelter that didn't have money for enough turkeys for Thanksgiving. Dad went to the shelter, checkbook in hand, to ensure that there was enough money to provide a holiday meal to many people in need."



Chuck adds, "Remember that Flyers game where Dad and I were in the fan shop. Dad struck up a conversation and found out the man was a veteran. He noticed the man looking longingly at game jerseys. Turned out, Dad purchased a jersey for the veteran and thanked him for his sacrifices for our country."

Chuck also remembers, "Dad was always willing to help out when I was a Boy Scout, even though he wasn't a Scout Master. He would go to meetings and on camping trips. One summer, none of the other parents were able to go on a camping trip. Dad took a week off work to come on the camping trip, to spend time with me and the other Scouts."

When their father passed away in 2013, the three Daley siblings became more involved in managing the grantmaking from their parents' commercial donor advised fund. They quickly realized that the **commercial donor advised fund offered limited options and assistance**.



The family decided to see what other options existed. **They reached out to the family's estate attorney, John R. Twombly, Jr., Esq. of Kennett Square.** "When I heard that the family was looking for more information on community issues, local charities, and how to determine the health of potential nonprofit grantees, I thought of the Community Foundation," explains John. "Although I hadn't worked directly with the Community Foundation before, I had heard from other attorneys, CPAs, financial advisors and nonprofits that the Community Foundation had experience here, and a solid reputation. I called the Community Foundation and requested some information; reviewed it diligently; and put it forth as an option for the Daley family to consider."

The Daley sisters brought their investment manager, Michael Connelly, to their first meeting with the Community Foundation, to serve as a sounding board. Connelly, too, had never worked directly with the Community Foundation. "When we heard about the stewardship, diligence, flexibility and range of services the Community Foundation could offer the Daley family, we were impressed," notes Michael. "It seemed like a good fit for the family's philanthropic desires."

After meeting with CEO/President Karen Simmons, and Vice President of Philanthropy Services Beth Harper Briglia, the Daley family decided that moving their donor advised fund from a commercial provider to the Community Foundation for perpetual stewardship was right for them.

On the investment side, at first the Daleys were unsure of whether they wanted their newly transferred Daley Family Foundation to be invested in the Community Foundation's core investment portfolio, or invested with their family's investment advisor. "The Community Foundation has flexibility. Either way is fine with us, as long as the advisor passes our **due diligence process**," explains Karen Simmons, CEO. "The Daley family decided to take advantage of the Community Foundation's Medallion program, and asked if Michael Connelly could manage the charitable fund. Michael and his staff breezed through the due diligence process readily, and they have been a pleasure to work with. We are delighted that the Daley family prompted us to explore a **medallion investment relationship** with Connelly & Moore Wealth Management Group of Wells Fargo Advisors."

On the grantmaking side, at the Community Foundation the Daleys found a group of like-minded individuals. "We get excited about community issues, and the staff at the Community Foundation gets excited. It's been rewarding to get to know various people and issues in the community," remarks Kanya. "The site visits have been especially interesting. We've visited the Chester County Food Bank and the West Chester Food



Cupboard. It was eye-opening to see how great the need is for food in Chester County, despite our perceived widespread wealth. Community Foundation staff helps us notice, ask questions, and understand things that might have escaped our attention, such as the impact of the PA budget impasse on community nonprofits and the people they serve.”

Working with Community Foundation staff, the Daley family refined its grantmaking process. The family decided to split its grantmaking pools evenly among the four members. This way, each can select grantees that speak to them, while making sure everyone has an equitable share to give.

The grantees chosen in the first year of the Daley Family Foundation **speak volumes about the varied interests and experiences of each family member:**

- Janet chose to award grants to support cancer patients and fund cancer research, in honor of family members touched by the disease.
- Kanya’s grants were made to nonprofits close to home, that resonated with her professionally, and that spoke to her heart and mind together.

- Carol Ann’s volunteer connections and family ties guided her decisions.
- Chuck’s grants were made to nonprofits that rescue his favorite animals, as he is personally familiar with the good work done in the community.

Decades ago, Charlie and Janet did a good thing when they decided to use some of their good fortune and create a donor advised fund. Their spirit of generosity has **grown into a family endeavor**, involving the next generation in the legacy of community giving, now and forever.

*Note: Learn more about professional advisors John R. Twombly, Jr. Esq. & Michael Connolly in the **Door Opener** articles of this annual report.*



“If you want to lift yourself up,
lift up someone else.”
~ Booker T. Washington



Legacy Funds: What legacy will you leave?

Legacy philanthropy is much more than sending a check. It ensures your continuing support for causes you care about, in perpetuity. It gives you the opportunity to carry on a family giving legacy. Combined with careful estate planning, it ensures that your personal resources are used to accomplish your financial and charitable goals.



Gifts to the Community Foundation can be made at any time to provide grants for current community needs and for perpetuity. By establishing a fund with the Community Foundation, you receive:

- **Permanence:** The Community Foundation’s trusteeship ensures that your contribution will continually meet needs relevant to your interests.
- **Commemoration:** Your name or the name of a loved one can live on through your fund. If you prefer, you may choose a name that reflects your fund’s charitable purpose.
- **Stewardship:** The Community Foundation’s Board of Directors, with guidance from its Investment Committee, staff, and outside investment counsel, closely monitors the performance of professional investment managers. The Foundation makes a full accounting to the community through its annual report, audit, and IRS Form 990.

- **Grantmaking Expertise:** The Community Foundation expertly assists in identifying charitable organizations and programs that address your particular interests and core values.

The Community Foundation primarily holds endowed funds in trust. We also manage some provisional funds.

- **Endowed Funds** are allowed up to a 5% grant payout for perpetuity, to assure that grant funds are always available to help nonprofits.
- **Quasi-Endowed Funds** are allowed up to a 20% grant payout, which means the principal will be diminished over time.
- **Provisional Funds** can be paid out in full at any time.

Grants awards are made to bona fide nonprofit causes throughout the United States.

TYPES OF FUNDS

CCCCF FUNDS

- **Fund for Chester County** gifts enable the Grants Committee to award strategic grants to Chester County nonprofits.
- **Lincoln Building Fund** gifts support the renovation and repair of the Community Foundation’s historic 1833 headquarters.
- **Operating Endowment** gifts allow the Community Foundation to focus on its core mission, growing legacy philanthropy.

FIELD OF INTEREST FUNDS

Donors who seek to impact a targeted issue area (arts, education, environment, health, human service, religion) or specific geographic region establish Field of Interest Funds. By naming an interest area rather than a specific organization, flexibility exists to meet ever-evolving community needs.

DONOR ADVISED FUNDS

An alternative to a private foundation, Donor Advised Funds are popular with donors who wish to establish a Foundation without incurring administrative operating and compliance filing burdens, while capitalizing on the Community Foundation’s philanthropy expertise and nonprofit field research. Donor Advised Funds enable individuals, families, community groups, and businesses to focus their philanthropy and make grants that impact the causes they care about most.

ORGANIZATIONAL ENDOWMENT AND NONPROFIT-DESIGNATED FUNDS

Designated Funds are created by nonprofit organizations and individual donors who care about the long-term success of particular nonprofit charities. This lets donors support specific charitable organizations for perpetuity, while the Community Foundation manages investments professionally and monitors for accountability.

SCHOLARSHIP FUNDS

Establishing a Scholarship Fund allows the donor to support students pursuing education beyond high school. A donor may name the scholarship’s selection committee and the guidelines for candidate selection. Most scholarships at the Community Foundation benefit disadvantaged, promising students from a particular high school, or those who pursue a particular field of study.

MEMORIAL FUNDS

Donors can quickly and cost-effectively create commemorative funds honoring people they hold dear.

LIFETIME GIFTS

Your charitable interests can be supported during your lifetime—and in perpetuity—through your gift. You will have the satisfaction of seeing the impact of your generosity as you carry out your charitable objectives.

FUTURE GIFTS

The Community Foundation can help you articulate your wishes for a gift commencing after your lifetime. The Community Foundation accepts most planned giving vehicles, including charitable gift annuities, bequests, retirement fund assets and life insurance. If you decide to leave a planned gift to the Community Foundation, or to a fund at the Community Foundation, please let us know so that we can properly carry out your wishes.

WAYS TO GIVE

There are many ways to become part of the Community Foundation and make a lasting contribution to our community:

- Establish and name **your own fund**, a family fund, a scholarship fund, or a memorial fund, with a gift of \$25,000 or more
- Establish a fund to benefit a **specific nonprofit charity (or charities)**, with a gift of \$25,000 or more
- Support Chester County’s greatest needs and opportunities by contributing any amount to our **Fund for Chester County**
- Enable the Community Foundation to reach out and recruit new legacy philanthropists by contributing any amount to our **Campaign for Independence Operating Endowment**, annual **Friends** campaign, or **Emerging Philanthropy** Initiative
- Maintain and restore the Community Foundation’s historic headquarters with a contribution to the **Lincoln Building Fund**
- Focus your gift with a contribution to a **Field of Interest Fund** (arts/culture, health, human services, religion, education, environment)
- Give **anonymously**
- Create a **testamentary** fund: open it now, fund it later
- Make a **planned gift**--through your Will, a charitable trust, or a charitable gift annuity--to support a thriving, healthy Chester County community for years to come.

The Community Foundation accepts a wide variety of gifts including:

- | | |
|----------------------------------|-----------------------------|
| • Cash | • Remainder of a Charitable |
| • Publicly traded securities | Remainder Trust |
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| • IRAs | Income Fund |
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| Community Foundation as | Charitable Lead Trust |
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To create your legacy fund, contact
Karen Simmons, President/CEO (610) 696-8845
Beth Harper Briglia, Vice President (610) 696-8045
Meetings are confidential.

\$25,000 = minimum to create endowed fund
\$135,000 = average fund size
Any gift amount can be added to existing funds.





“The more you praise and celebrate your life,
*the more there is in life
to celebrate.*”

~ Oprah Winfrey



Ben Franklin Legacy Society

If you have named the Chester County Community Foundation or any of our funds as a beneficiary in your Will, charitable gift annuity, charitable remainder trust, life insurance, or retirement plan, you are eligible for membership in our Ben Franklin Legacy Society.

By joining our Ben Franklin Legacy Society, you make your intentions public and help inspire others. This helps to build a strong, vibrant philanthropic community. To join the Society, simply advise the Community Foundation of your intent. You can give to any existing fund, or create one of your own.



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Best Dessert-Popular Vote: John Serock Catering – Sweet Grilled Cheese with Strawberry Bisque
Best Dessert-Professional Judges Vote: New Street Catering – Peanut Butter & Jelly Cheesecake with Chocolate Ganache & Peanut Butter Truffle

Brandywine Catering - Homemade Dark Chocolate Truffles
Cakes and Candies by Maryellen - Popcorn Crack
Delightful Desserts & Culinary Creations - Berry Peachy Keens
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In 2016, contributions totaled \$3.2 million from 2,437 donors.

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Twin Peaks Beauty

**Terry Muzzy Scholarship
Foundation**
Atlas Concrete Specialist
Ms. Nancy C. Buckwalter
Mr. & Mrs. Robert Caprice
Chester County Running Store
Ms. Lisa Ciccotelli
Ms. Elizabeth Eck
Mr. Joseph A. Iezzi
John Angelini 40th Birthday
Mr. & Mrs. Tim J. Kissell
Mr. Duane Knecht
Larry C. Smedley
Madsen Inc.
Bruce E. Mapes, Ph.D.
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Mrs. Martha Muzzy
Optimum Physical Therapy
Associates
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Rothwell Document Solutions
Mr. & Mrs. Gerard Scofield
Mr. & Mrs. Donald A. Strathy
Synergy Houses
Mr. Thomas Dey & Cathie Voit, Esq.
Mr. & Mrs. James J. Walker, Jr.
Mr. B. Patrick Weber
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Support Groups
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Teti Family Foundation
Mr. & Mrs. Louis N. Teti

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- West Chester Downtown
Foundation**
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Arthur Hall Insurance
Ms. Mary Barrett
Belfor USA
Bernardon PC
Mr. Jason Birl
Bliss & Company
Mr. Tyler Bottke
Mrs. and Mr. Linda L.
Braceland
Brandywine Valley Heating
and Air Conditioning
Mr. & Mrs. Stuart B. Brooks
Mr. Mark Bruno
Bryn Mawr Trust Company
Mr. Jim Buchanan
Mr. & Mrs. Allen K. Burke
Ms. Leigh Burnett

Mr. Michael Cabry
Mr. & Mrs. Bruce Cavin, AIA
Ms. Carolyn Childs
Ms. Stephanie Collison
Mr. & Mrs. Patrick Comerford
Mr. John Connors
County of Chester
Cozen O'Connor
Mr. John Crispino
D'Ascenzo's Gelato
Ms. Jenine De Stefano
Decorating Den Interiors
DellaVecchia, Reilly, Smith &
Boyd Funeral Home
Mr. Jerry DeSiderato
Ms. Christine Diorio
DNB Financial Corp
DNB First Wealth Management
Mr. Thomas Dowd
Mrs. Phylliss Dunn
E. Kahn Development Corp.
Ms. Theresa Edgar
Ms. Carol Egee
Mr. Brian Ehlenberger
Ms. Anna Ehlenberger
Ms. Nancy Ellis
Honorable Terence Farrell
Faunbrook Estate of West Chester
Mr. & Mrs. Joseph Finnaren
Ms. Amanda Fleming
Mr. Andrew Flintrop
Founds Funeral Home
Mr. Edward Frackelton
Frens and Frens
Fulton Bank Financial Advisors/
Clermont Wealth Strategies
Mr. Joseph Funaro
Ms. Janet Gallagher
Mr. Michael Graham
Mr. Dane Gray
Mr. & Mrs. Gary R. Green
Mr. Frederick T. Gusz, Jr.
Mr. Eric Haage





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Christine R. Hannafin, Ph.D.
Mr. & Mrs. Michael Harris
Ms. Megann Hedgecock
Mr. & Mrs. Kevin Hendrickson
Ms. Frances Hill
Mr. & Mrs. Kevin Holleran
Mr. Matthew Holliday
Mr. & Mrs. Matthew J. Horenkamp
Hotel Warner
Ms. Lisa Hughes
Mr. & Mrs. George W. Hutter
Jane Chalfant/Kiki Boutique
Mr. James D. Jefferis
Dr. & Mrs. Craig W. Jester
JL Architects
Mr. & Mrs. Malcolm S. Johnstone
Mr. Donald Kane
Honorable Michelle Kichline
Mr. & Mrs. James Kimmel
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Ms. Jeannie McGinn
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Ms. Jackie McHugh
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Ray Ott & Associates
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Ms. Allison Royer
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Swope Lees Commercial
Real Estate
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Mr. Ernie Thivierge
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Mr. & Mrs. Michael J. Wall
Ms. Susanna M. Wall
Ms. Josephine Lippincott Winsor

Volunteer English Program Fund
Volunteer English Program in
Chester County

**W. Marshall Schmidt Fund for
the Childrens' Country Week
Association**
Mr. W. Marshall Schmidt

**WC Henderson Class of 1953
Scholarship Fund**
Marin Community Foundation

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Mrs. Margaret A. Huebner
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Aidan's Heart Foundation
All Seasons Adjusting
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Derma Sciences
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Mr. William J. Penney
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Mr. Brad Phillips
Mr. Edmond Phillips
Mrs. Patricia Phillips
Phoenixville Area Children's
Learning Center
Mr. Sam Pickel
Porsche of The Main Line
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Quality Systems Integrators
R&G Gorr Enterprises DBA
Lafayette Supply
Ms. Teresa Reid
Repeffect
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Accounting Center
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Seide Financial Group
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Ms. Christy Silva
Ms. Karen Simmons
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S-J Mid-Atlantic
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Mr. Jon Sobocinski
Springton Manor
Elementary School
Mr. Robin Stanzione
Mr. Shawn Staska

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Dr. Andrew Swenda, Jr.
Mr. Kenneth Swimm
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Transamerica Life
Insurance Company
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Unipak
Ms. Victoria Warren
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Whitford Country Club
Swim Team
Mr. Michael C. Williams
Mr. Joseph Wilson
Wings for Success
Mr. & Mrs. Charles J. Winiarski

Mr. Clayton P. Wood
YMCA Lionville Community
Mr. & Mrs. Matthew Taylor
Young
Mr. Daniel R. Zajac

**Whitford Charitable Fund -
Merriman Golf Outing**
Bank Leumi USA
BHI USA
Mr. Kameron Cerrato
Citi Business Services
Communications Test Design
Ecore International
Mr. Joseph Finley
Fox Rothschild
Mr. Luke Hirneisen
Mr. David Killen
Mr. Tom Krug
Mr. Marcus Merriman
Reed Smith
Mr. & Mrs. Thomas J. Wallace
Whitford Charitable Endowed
Grantmaking Fund



Please help us correct errors or omissions. Contact the Foundation at (610) 696-8211
or info@chescof.org. Thank you for your understanding and assistance.



*“Understanding
human needs is half the job of meeting them.”*

~ Adlai E. Stevenson



Investment Management

PORTFOLIO OBJECTIVES

The Community Foundation is committed to prudent investment management strategies and fiscal policies that it believes will lead to the long-term growth of endowment fund principal and meet the Community Foundation’s distribution policy objectives. The Community Foundation seeks to preserve and enhance the value of the portfolio’s assets by providing long-term growth greater than the rate of inflation and fee costs, while recognizing that prudent risks must be taken.

The Community Foundation’s investment goals are:

- 1. to achieve a return in excess of the target return
- 2. to minimize portfolio drawdown risk, to the extent possible, in seeking to achieve the Foundation’s long-term growth objectives

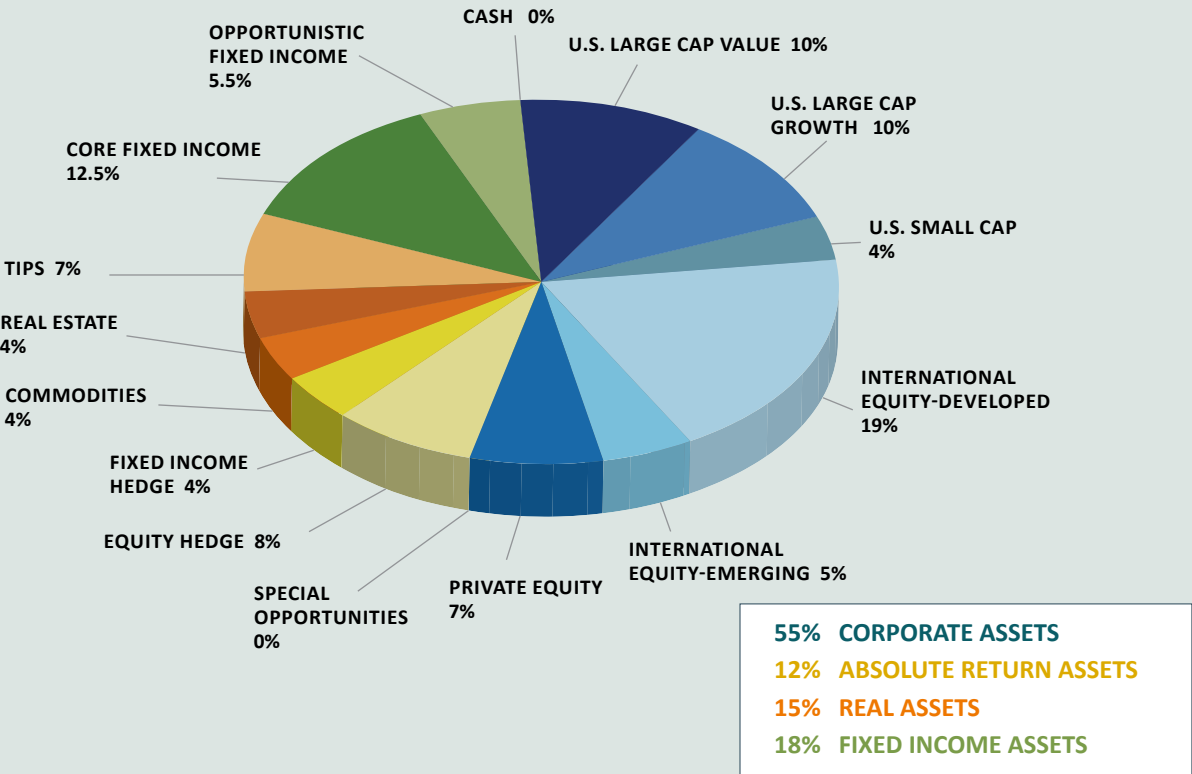
Endowed Funds Long Term Target Return: The Community Foundation desires a long term target return that provides portfolio growth, exceeds inflation, covers investment fee expenses, covers the Foundation’s administrative fee, and covers the annual grant payout (of up to 5% of the previous fiscal year end balance). Based on the fluctuating actual spend, the minimum required long term target return will be defined as the trailing 5 year actual spend rate + Current CPI + administration fees.

Quasi-Endowed Funds Long Term Target Return: The Community Foundation desires a long term target return that provides portfolio growth, covers investment fee expenses, covers the Community Foundation’s administrative fee, and covers the liquidity necessary for a potential annual grant payout (of up to 20% of the previous fiscal year end balance).

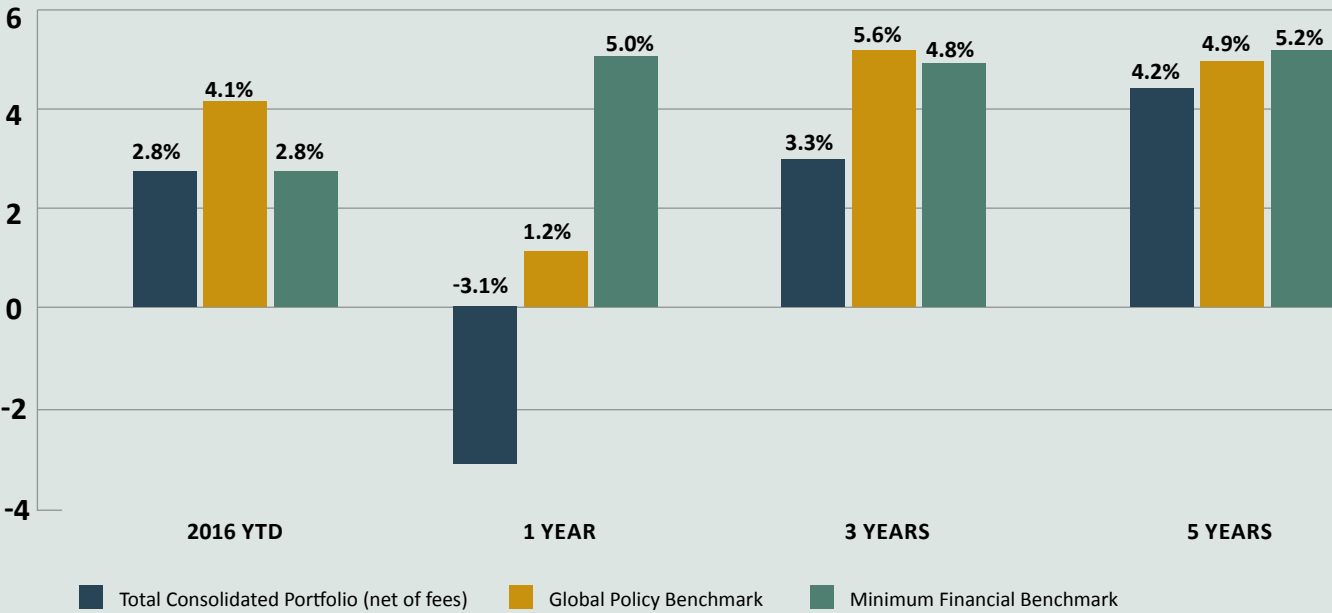
POLICY PORTFOLIO STRUCTURE AND RANGES

ASSET CLASS	BENCHMARK	ENDOWED RANGE	QUASI RANGE
Corporate Assets	ACWI ETF	35% - 70%	30% - 65%
Absolute Return Assets	Cash + 5%	10% - 25%	10% - 20%
Real Assets	HC Commodities Index/TIPS ETF/REIT/ETF	10% - 25%	10% - 20%
Fixed Income Assets	BarCap Agg ETF	10% - 40%	10% - 55%

ASSET ALLOCATION STRATEGY TARGETS CCCF AGGREGATED ENDOWED FUNDS



TOTAL CONSOLIDATED ANNUALIZED RETURNS FOR THE ENDOWED PORTFOLIO as of 6/30/2016





CHIEF INVESTMENT OFFICER FIRM –
AGGREGATE INVESTED ASSETS

HIRTLE, CALLAGHAN & CO. serves as the Community Foundation’s Chief Investment Officer (CIO).

Hirtle Callaghan works with the Community Foundation to develop a formal Investment Policy designed to best meet the Community Foundation’s long-term objectives. The Investment Policy is formulated on a long-term, broadly diversified strategic asset allocation plan with asset class targets and operating ranges.

As the Community Foundation’s CIO, Hirtle Callaghan’s full time focus is to deliver strategic and proactive asset class guidance and total investment program implementation of the portfolio’s assets including the identification, selection, and termination of investment managers. Hirtle Callaghan is also responsible for retaining and directing the activities of the independent custodian, and all other vendors involved in providing data, analysis and other services used to manage the portfolio. Hirtle Callaghan provides quarterly statements and performance reports, net of all fees, with comparisons to relevant benchmarks.

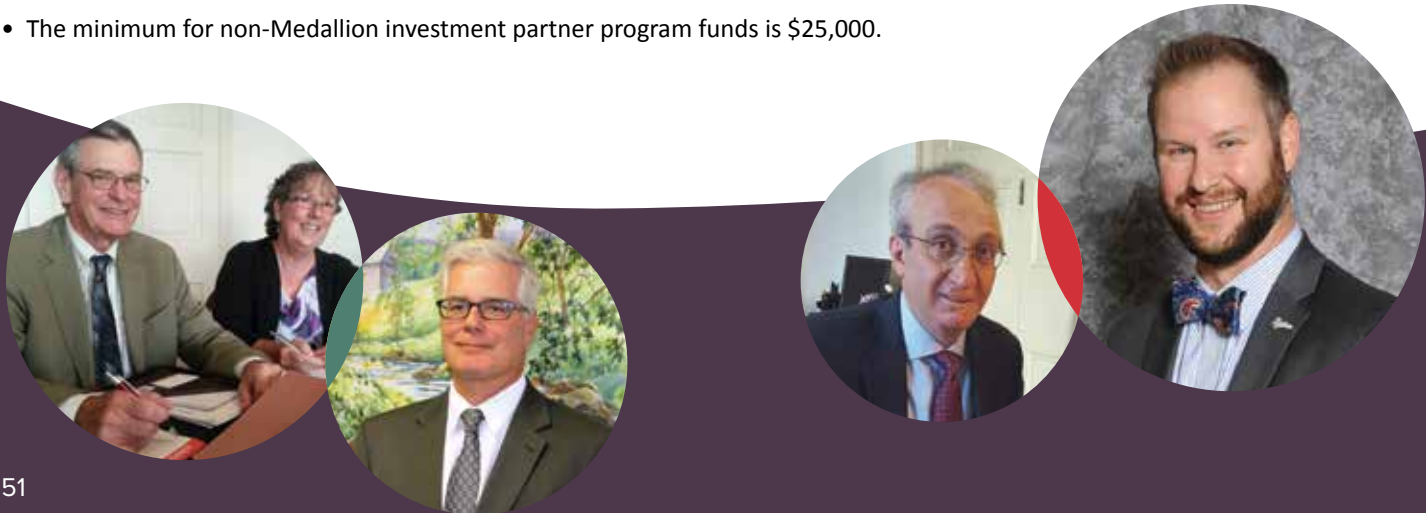
MEDALLION INVESTMENT PARTNERS – SEPARATELY MANAGED INVESTED ASSETS

The Community Foundation’s Medallion Investment program gives you the opportunity to establish a donor advised fund at the Community Foundation, while having a qualified advisor you choose continue to manage the asset and receive investment management fees. It all adds up to a winning formula:

- donors supply the charitable passion
- wealth managers and investment advisors supply the investment expertise
- the Community Foundation supplies the charitable legacy vehicle

All get credit for the perfect charitable solution.

- Medallion status is awarded to investment advisors/firms which pass an annual due diligence review undertaken by the Community Foundation’s Investment Committee. Medallion funds are separately managed, non-aggregated funds, which receive their own investment return. The Community Foundation may charge a modest additional annual fee to the charitable fund for this service.
- The minimum amount to start a fund in the Medallion program is \$250,000 with the intent to grow to at least \$1 million.
- The minimum for non-Medallion investment partner program funds is \$25,000.



 GOLD Foundation Funds Invested	     
 SILVER Planned Gift Pledge Investment Partner	 
 BRONZE Pre-approved as Medallion partner, no funds yet	

WE HELP YOU FIND THE BEST CHARITABLE SOLUTIONS...

Individuals increasingly expect their professional advisors to assist them with strategic philanthropy as part of overall planning.

The Community Foundation is a philanthropy resource for estate planning attorneys, wealth managers, financial planners, and CPAs:

- the client understands their own needs and desires
- the advisor understands their client’s financial and estate circumstances
- the Community Foundation understands legacy philanthropy

It’s a winning partnership. The Community Foundation helps advisors and their clients customize philanthropy solutions for their specific situations. Whether it is through a gift of appreciated securities or real estate, a non-cash asset, a life insurance policy, or bequest, there are many ways the Community Foundation helps professional advisors find solutions, to help fulfill dreams of giving to the community.





“One generation plants the seeds.
Another gets the shade.”

~ Chinese proverb

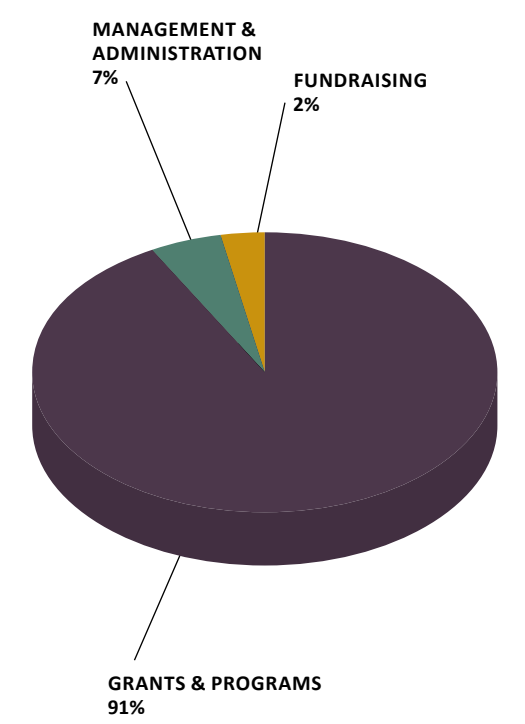


Finances

CHESTER COUNTY COMMUNITY FOUNDATION
STATEMENTS OF FINANCIAL POSITION as of June 30
Audited by Umbreit Korengel & Associates

ASSETS	2016	2015
Cash & cash equivalents	\$2,357,326	\$2,877,150
Unconditional promises to give, net	38,055	55,208
Prepaid expenses	14,206	14,903
Certificates of deposit	1,118,416	930,278
Marketable securities	42,496,538	44,187,618
Loan receivable	264,119	0
Property & equipment, net	407,583	443,437
TOTAL ASSETS	\$46,696,243	\$48,508,594
LIABILITIES		
Accounts payable & accrued expenses	\$71,676	\$70,893
Annuities payable	265,644	349,186
Not-for-profit endowments	4,669,986	4,944,165
TOTAL LIABILITIES	\$5,007,306	\$5,364,244
NET ASSETS		
Unrestricted-board designated	\$41,650,882	\$43,089,142
Temporarily restricted	38,055	55,208
TOTAL NET ASSETS	\$41,688,937	\$43,144,350
TOTAL LIABILITIES AND NET ASSETS	\$46,696,243	\$48,508,594

USES OF FUNDS



To obtain a copy of the audit or IRS 990, contact the Foundation at (610) 696-8211 or info@chesccof.org.





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Vice Chair

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Corporate Secretary/Treasurer

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Joanne Peskoff Bear, Esq.
Community Volunteer

Carol Clark
Community Volunteer

John Diederich, CFA
Director of Investment Strategy
Dock Street Capital

SPECIAL THANKS

The Community Foundation Board acknowledges the dedicated service of Carl Francis, whose term expired June 30, 2016.

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Community Volunteer

Meg Freeman
Community Volunteer

Kevin Holleran, Esq.
Partner, Gawthrop Greenwood

Michael R. Horak, CFA
Community Volunteer

Ann Hutton
Community Volunteer

Michael B. Karwic, CFP, CRPC, AEP
Principal, Iron Valley Wealth Management

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Anthony Morris, Esq.
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Carol Ware, Ph.D.

Dr. Henry A. Jordan
Founding Chair, 1994-2000
cum stellarum

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The Community Foundation thrives due to the work of its committees, composed of Board members and community volunteers. These individuals dedicate countless volunteer hours to increase philanthropy throughout Chester County.

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Scott Hattersley
Rachelle Lusk, Esq.
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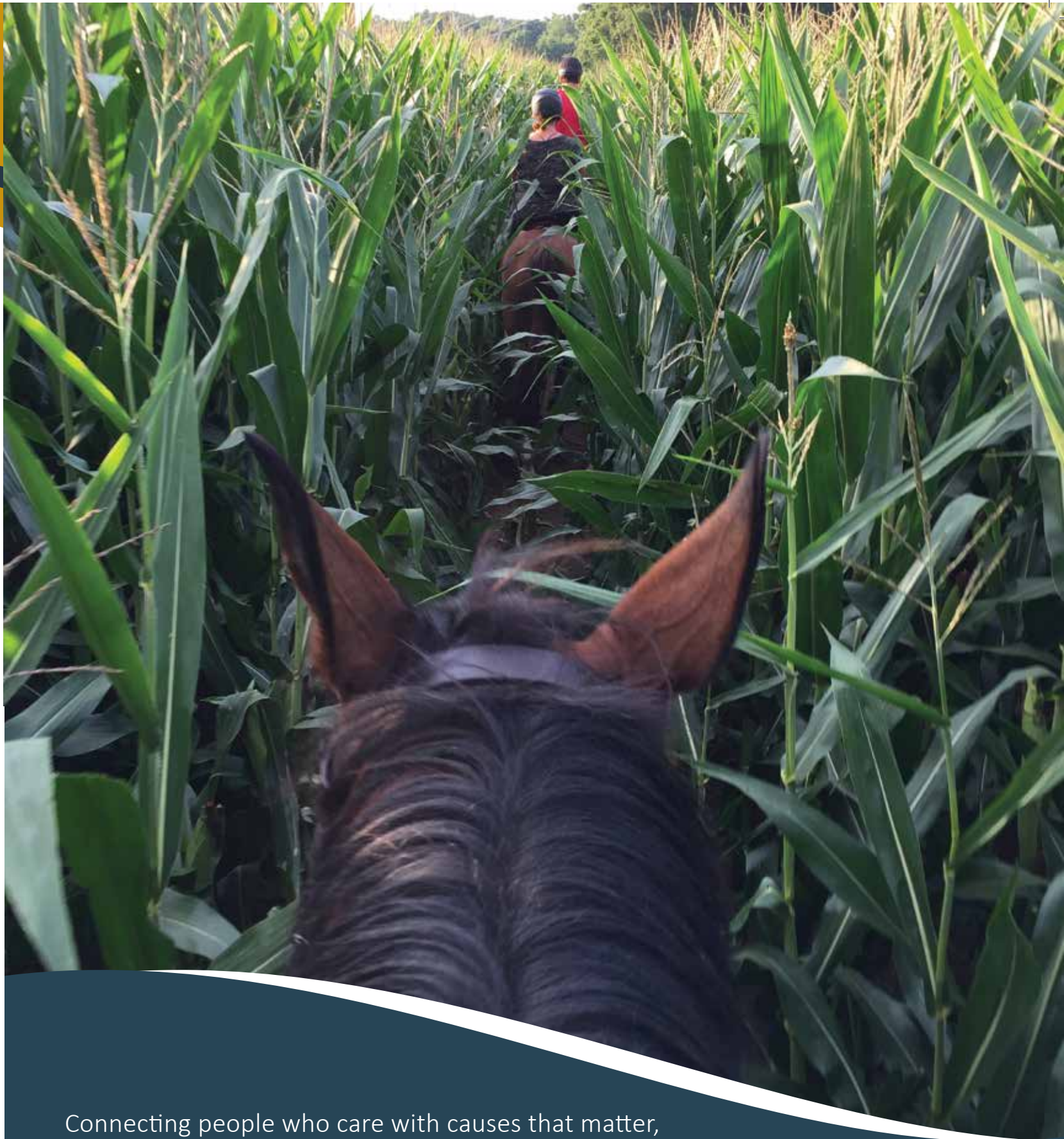
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