Chester County Community Foundation
Connecting People Who Care With Causes That Matter

The Lincoln Building | 28 W. Market Street | West Chester, PA 19382
610.696.8211 | www.chescofoundation.org | info@chescofoundation.org

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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
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.

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

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ken @ ccfunders.org 2019 Chester County Community Foundation
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.

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

Karen A. Simmons
President/CEO
The strength of the Chester County Community Foundation is in its power to change people’s 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.

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

GRANTEES

Bank Street College of Education
Barclay Friends
Barn at Spring Brook Farm
Baugham Memorial United Methodist Church
Bethesda Project
Bishop Shanahan High School
Bournelyf Special Camp
Boy Scouts of America, Chester County Council
Boys & Girls Club of St. Helena & Calistoga
Brandywine Baptist Church
Brandywine Health Foundation
Brandywine Red Clay Alliance
Brandywine Valley SPCA
Bridge Academy and Community Center
Bridge of Hope of Lancaster & Chester Counties
Bryn Mawr Rehabilitation Hospital
 Cabrini College
Cairn University
Calvary Chapel of Delaware County
Camp Dreamcatcher
Campbell Special School
Catawba College
Catholic Charities Appeal
Centennial Lutheran Church
Charity Treks
Charles A. Melton Art & Education Center
Chemical Heritage Foundation
Chester County 2020
Chester County Art Association
Chester County Community Dental Center
Chester County Dept of Community Development
Chester County Food Bank
Chester County Fund for Women and Girls
Chester County Futures
Chester County Historical Society
Chester County Hospital Foundation
Chester County Library
Chester County Opportunities Industrialization Center
Chester County Pops Orchestra
Chester County’s Children
Children’s Country Week Association
Children’s Hospital of Philadelphia
Christ Community Church
Cincinnati Children’s Hospital Medical Center
Citizens Advocacy of Chester County
The Clinic
Coatesville Area Senior Center
Coatesville Center for Community Health
Coatesville Community Education Foundation
Coatesville Youth Initiative
Colebrookdale Railroad Preservation Trust
Colonial Theater
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

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.

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
2093 Dutton Mill Road
Newtown Square, PA 19073
www.connelly.wfadv.com/Michael-F---Connelly.e100157.htm

Michael F. Connelly, Douglas R. Moore, David Concorlo Jr., CFP®, Nicole Moltose, Marian R. Marcus, George C. Plotis, Margaret M. Todd, CFP®, CFP®, Denise A. Wine

Door Opener Honorees

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

Jordan Award Honorees

2000 Elizabeth Ranney Moran of Paoli
2001 Gordon B. Hattersley, Jr. of Berwyn
2002 Aaron J. Martin of Kennett Square
2003 Charles Lukens “Skip” Huston, III of Chester Springs
2004 Penelope “Penny” Wilson of Malvern
2005 David M. Frees, Jr. of Phoenixville
2006 Moira & Kenneth Mumma of Chester Springs
2007 Eva L. Verplanck, Ph.D. of Kennett Square
2008 Carol Ware, Ph.D. of Christiana
2009 Jennifer & Robert McNeil of Coatesville
2010 The Herr Family of Nottingham
2011 Jacqueline & Martin Clompus of West Chester
2012 Wiggie & John Featherman of West Chester
2013 Albert W. Eastburn of Coatesville
2014 Richard Kursch of Phoenixville
2015 Alice & Rodman Moorhead III of West Grove
2016 W. Thomas Musser of Kennett Square
On Monday morning, he founded Tri-M with his brother Dick. On Saturday morning, he married Bonnie Anderson. On Friday night, he quit his job with the electrical contractor. In 1964, Tom had an event-filled few days: in industry.

Most of the region’s electrical contractors were residential contractors; they didn’t really specialize in industrial electrical contracting.

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

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.

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- On Saturday morning, he married Bonnie Anderson.
- On Monday morning, he founded Tri-M with his brother Dick.

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.

In service to his community, Tom 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.

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 was whole-hearted.”

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.

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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.

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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. It 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 Bauguess, Tom’s son-in-law. Tom’s children, Traci Musser Bauguess 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.

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 BosOnBoard 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 Diane & Thomas Lafferty Fund-Benefit Wistar Institute, 1999
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 Chester County Environment, 2001
CCCF HARB Gettysburg Address Contest, 2004
CCCF HARR Gettysburg Address Contest, 2004
CCCF Jordan Award Fund, 2001
CCCF Josh Hibberd Award Honoring Margeretta Durnall Hibberd, 2013
CCCF Lincoln Biography Building Endowed Fund, 1996
CCCF Madalene Hayes Conner Scholarship Fund, 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 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 Tepelke Charitable Legacy Fund, 2013
Anne Stroud Hannum Charitable Fund, 1998
Barney Harahan Memorial Fund, 2002
Barrie Stavis Foundation, 2002
Baxter Family Foundation, 2014
Baykus & 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 F. & Martha J. Thomas Foundation, 2002
DelBaptiste Foundation, 2010
De & Dallas Krapf Foundation, 1999
Dianne & Dave Elderkin Charitable Fund, 2013
Dick & June 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
Halley Bear Memorial Fund, 2016
Happy Rumar 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 DelBaptiste Church Foundation, 2014
Hutton Family HLPF Fund, 2000
I Scream for Elephants Charitable Fund, 2011
Ilex Charitable Fund, 2012
Jack C. Gries 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
Katherine McBratnie Memorial Foundation, 2004

Kelly Family Foundation, 2012
Kennedy Marie Canzoneri Memorial Fund, 2016
Kevin Hofferan 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. Coppege Memorial Fund to Benefit Grimes AME Church, 2005
Margaret S. DeVinney Foundation, 2011
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-Miller Fund for Student Travel, 2004
Orchard Charitable Fund, 2001
P.G. Thomas Charitable Legacy Foundation, 2009
Pay It Forward Fund, 2014
PFF Charitable Fund, 2001
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 Vermiel Foundation, 2010
Richard & Lois Hodgson Charitable Fund, 1998
Rigg Family Foundation, 2011
RJ Hogg Foundation, 2014

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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, 2008
Juvenile Diabetes Research Foundation Endowment Fund, 2000
Kiwanis Club of Phoenixville Endowment Fund, 2001
La Colunidad Hispana Honorary Endowed Fund, 2013
La 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
SCHOLARSHIP FUNDS

Alice Lawson Scholarship Fund, 1998
Alice M. Thomas Scholarship Fund, 1998
Brian Kadunc Memorial Scholarship Fund, 1999
Brianne Carter Memorial Scholarship Foundation, 2001
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, 2002
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

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

Halliday Clark, Sr. Memorial Scholarship Fund, 1998
Harry Dunn Art Scholarship Fund, 2001
Hon. Dr. Elinor & William Taylor Scholarship Fund, 2004
Jeffrey A. Wheat Memorial Scholarship Fund, 2011
Jeffrey Gaunt Memorial Scholarship Fund, 2008
John & Mary DeCecce 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
Karen Field Memorial Scholarship Fund, 2005
Karrin Field Memorial Scholarship Fund, 2005
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. MacEntee Scholarship Fund, 2006
Patricia B. Dixon Scholarship Fund, 2000
Peoples First Scholarship Fund, 2004
Quaker City Farmers Scholarship Fund, 2000
Rotary Club of Coatesville Educational Fund, 1998
Ruch Family Scholarship Fund, 2011
Schramm Scholarship Fund, 2005
Stanley’s Dream Scholarship Fund, 2010
Susan DeCecce 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

CCCF FAMILY OF AFFILIATED FUNDS

% OF ASSETS, 2016

DONOR ADVISED 54%
FIELD OF INTEREST 3%
CCCF 24%
SCHOLARSHIPS 8%
FISCAL AGENT 0%
NPO 11%

“Gentleness, self-sacrifice and generosity are the exclusive possession of no one race nor religion.”
~ Mohandas Gandhi
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. So, 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,” 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.”

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.

“CardConnect had volunteer release time in place, so employees were highly motivated to give back,” explains Community Foundation CEO Karen Simmons. “When our Board Member Patrick South introduced us to CardConnect, we were enthralled with this brilliant company’s corporate ethic of innovative community engagement,” 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.”

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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 CFO 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 SLI Corporation. At SLI, 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 stuck 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

DALEY FAMILY FOUNDATION, est. 2015

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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 Connelly 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.

Types of Funds

CCCF 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.

To create your legacy fund, contact: Karen Simmons, President (610) 696-8845
Beth Harper Briglia, Vice President (610) 696-8045
Meetings are confidential.

Any gift amount can be added to existing funds.

$25,000 = minimum to create endowed fund
$135,000 = average fund size
$335,000 = average fund size

30
“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.

LEGACY SOCIETY MEMBERS

Louis J. Beccaria, Ph.D.
Henry S. Belber, JI*
Elise Bodnar*
Elizabeth Bove*
Michael & Elizabeth Briglia
Robert & Lucille Bugel
Constance Carter
Patricia C. & John Celi, Jr.
Kimberly C. Collier*
Margaret S. DeVinney*
Eugene DiOrio
William & Anne Evans, Jr.*
John & Wiggie Featherman
Ronald Fletcher
Deborah Francis
Harold Freeman
David & Robin Frees
Frances T. Herron*
Josiak H. Hibberd*
Richard J. Hutton*
Richard A. Kunsch, Sr.
Carl & Sylvia Landis
Ida Mae Large*
Zelinda LeBlancilker*
Jack Loew*
Bronwyn L. Martin, Ph.D., MBA, CFS,
CRPC, CMFC, CFP (D)
Matthew 25 Fund
Meghan Mcty & Jason Alexander
Mr. & Mrs. Raymond Moskowitz
Plymouth Charitable Fund
Robert & Karen Rigs
Cecilia C. Schramm*
Leslie B. Schramm*
Karen A. Simmons
Louise Schorn Smith, CPA, CMA, MBA
Barbara Sunday
Gustave & Anne* Teipelke
Craig Lincoln Tucker
Christopher Lockwood Vaughan
Anonymous Estate (4)*
Anonymous Estate Bequest to benefit
Kennett High School Scholarship Fund*
Anonymous of Bryn Mawr
Anonymous of Chester Springs (4)
Anonymous of Chryse (2)
Anonymous of Coatesville (4)
Anonymous of Devon
Anonymous of Downingtown (4)
Anonymous of Exton (2)
Anonymous of Glenmoore
Anonymous of Hilton Head, SC
Anonymous of Jenkintown (4)
Anonymous of Kennett Square (8)
Anonymous of Kimberton (2)
Anonymous of Malvern
Anonymous of Media
Anonymous of New York City, NY
Anonymous of Paoli (3)
Anonymous of Parkesburg
Anonymous of Phoenixville (4)
Anonymous of Princeton, NJ
Anonymous of Spring City
Anonymous of West Chester (24)
Anonymous of West Grove (5)
Anonymous of Wilmington
Anonymous of Wynnewood

*deceased
COMMUNITY CHAMPION
BB&T

GOLD CORPORATE SPONSORS
Gawthrop Greenwood
Hirtle Callaghan
MacElree Harvey
Sugartown Smoked Specialties/GBH

SILVER CORPORATE SPONSORS
Dansko Foundation
JM & Lois Herr Family Foundation
Jean & Aaron Martin Fund
Phoenixville Federal Bank & Trust
Rainer & Co.
Rigg Darlington Group
Sickler Foundation

BRONZE CORPORATE SPONSORS
Belfint Lyons & Shuman
Buckley, Brion, McGuire, Morris
Connelly & Moore Wealth Management Group of Wells Fargo Advisors
DNB First Wealth Management
Lamb McErlane
Larmore Scarlett
Lyons & Hohl
Manning & Napier Advisors
Manito Abstract Co.
Martin’s Financial Consulting Group/Ameriprise Financial
Merrill Lynch Snelling/Karakelian
Pegasus Technologies
Umbreit, Korengel & Associates
West Chester Off Campus Housing
Wilmington Trust, an M&T Bank

SWEET CHARITY IN-KIND CONTRIBUTORS
SITE SPONSOR
William H. Bunch Auctions & Appraisals, Sweet Charity Host

DESSERTS
Most Creative: Gemelli Artisanal Gelato & Dessert Café – Mini Vanilla Apple Pie Gelato
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
General Warren Inne - Tiramisu “with a Twist”
MacDougall’s Irish Victory Cakes - Mini MacDougall Irish Cream Cake Parfaits

SWEET CHARITY PROFESSIONAL JUDGES
Mary Bigham, thetowndish.com
Albert Lauber, Neuchatel Chocolates
Dee Rogevich, PA Restaurant Association

GUEST SWEET PARTING GIFTS
Courtesy of Albert Lauber, Neuchatel Chocolates

MEDIA SPONSORS
Chester County Press
County Lines Magazine
Daily Local News
The Kennett Paper
Main Line Today
thetowndish.com
WCHE 1520-AM

THANKS TO OUR SWEET VOLUNTEERS
Victoria Gardens Auxiliary
West Chester University Abbe Society
West Chester University Friar Society
& all our former Community Foundation interns who return to lend a hand
Donors

The Community Foundation gratefully recognizes our donors who create and contribute to the Community Foundation’s family of funds. Special thanks to those who so generously contribute to the Foundation’s own core operating annual, capital, grantmaking and endowment funds.

In 2016, contributions totaled $3.2 million from 2,437 donors.
Mr. Marc Pelletier
Mr. William J. Penney
Mr. & Mrs. Les Bear
Ms. Peggy Petrakis
Mr. Brad Phillips
Mr. Edmond Phillips
Mrs. Patricia Phillips
Phoenixville Area Children’s Learning Center
Mr. Sam Pickel
Porsche of The Main Line
Mr. & Mrs. George Powers
Mr. Andrew Pyle
QBE Foundation
Quality Systems Integrators
R&G Gorr Enterprises DBA Lafayette Supply
Ms. Teresa Reid
Repeffect
Mrs. Nancy Repko
Mr. & Mrs. James Rosenhoef
Mr. Robert Reynolds
Ricoh Administrative Accounting Center
Mr. & Mrs. Richard J. Riegel
Ms. LeeAnn Riloff
Mr. Michael P Robinson
Ms. Lara M. Ross
Ruggieri Cadillac
Ms. Eileen Rumer
Mr. Jeffrey Russo
Mr. Keith Rymer
Safe Harbor of Chester County
Mr. & Mrs. Brian Scavuzzo
SE PA Autism Resource Center
Seide Financial Group
Mr. & Mrs. Scott Shafer
Ms. Christy Silva
Ms. Karen Simmons
Singer Equipment Co.
S & J Mid-Atlantic
Mr. Thomas Skelley
Sly Fox Brewhouse & Eatery
Mr. & Mrs. Justin Smith
Mr. & Mrs. Thomas C. Snyder
Mr. Jon Sokolowski
Springton Manor Elementary School
Mr. Robin Stansione
Mr. Shawn Staska
State Farm Insurance
Mr. Andrew M. Storti
Mr. George Stratton
Dr. Andrew Swenda, Jr.
Mr. Kenneth Swimm
Mr. & Mrs. Jim J. Terry
Mr. & Mrs. Richard Thompson
Transamerica Life Insurance Company
Mr. Bill Trull
Mr. & Mrs. Daryl Tunno
Mr. Ryan K Tyler
U.S. Charitable Gift Trust
Unipak
Ms. Victoria Warren
Mr. John A. Webb
Mr. & Mrs. Ethan Weiss
Mr. & Mrs. Lawrence Wenke
Ms. Kirsten White
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. Cameron Cerrato
Citi Business Services
Communications Test Design
Ecore International
Mr. Joseph Finley
Fox Rothschild
Mr. Luke Hirneisen
Mr. David Kilien
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@chesocf.org. Thank you for your understanding and assistance.

“Understanding human needs is half the job of meeting them.”
~ Adlai E. Stevenson
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

<table>
<thead>
<tr>
<th>ASSET CLASS</th>
<th>BENCHMARK</th>
<th>ENDOVED RANGE</th>
<th>QUASI RANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Assets</td>
<td>ACWI ETF</td>
<td>35% - 70%</td>
<td>30% - 65%</td>
</tr>
<tr>
<td>Absolute Return Assets</td>
<td>Cash + 5%</td>
<td>10% - 25%</td>
<td>10% - 20%</td>
</tr>
<tr>
<td>Real Assets</td>
<td>HC Commodities Index/TIPS ETF/REIT/ETF</td>
<td>10% - 25%</td>
<td>10% - 20%</td>
</tr>
<tr>
<td>Fixed Income Assets</td>
<td>BarCap Agg ETF</td>
<td>10% - 40%</td>
<td>10% - 55%</td>
</tr>
</tbody>
</table>
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.

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.
Finances

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

ASSETS

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; cash equivalents</td>
<td>$2,357,326</td>
<td>$2,877,150</td>
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<tr>
<td>Unconditional promises to give, net</td>
<td>38,055</td>
<td>55,208</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>14,206</td>
<td>14,902</td>
</tr>
<tr>
<td>Certificates of deposit</td>
<td>1,118,416</td>
<td>930,278</td>
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<tr>
<td>Marketable securities</td>
<td>42,496,538</td>
<td>44,187,618</td>
</tr>
<tr>
<td>Loan receivable</td>
<td>264,119</td>
<td>0</td>
</tr>
<tr>
<td>Property &amp; equipment, net</td>
<td>407,583</td>
<td>443,437</td>
</tr>
<tr>
<td>TOTAL ASSETS</td>
<td>$46,696,243</td>
<td>$48,508,594</td>
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</tbody>
</table>

LIABILITIES

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable &amp; accrued expenses</td>
<td>$71,676</td>
<td>$70,893</td>
</tr>
<tr>
<td>Annuities payable</td>
<td>265,644</td>
<td>349,186</td>
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<tr>
<td>Not-for-profit endowments</td>
<td>4,669,986</td>
<td>4,944,165</td>
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<tr>
<td>TOTAL LIABILITIES</td>
<td>$5,007,306</td>
<td>$5,364,244</td>
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</table>

NET ASSETS

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted-board designated</td>
<td>$41,650,882</td>
<td>$43,089,142</td>
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<tr>
<td>Temporarily restricted</td>
<td>38,055</td>
<td>55,208</td>
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<tr>
<td>TOTAL NET ASSETS</td>
<td>$41,688,937</td>
<td>$43,144,350</td>
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</tbody>
</table>

TOTAL LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$46,696,243</td>
<td>$48,508,594</td>
</tr>
</tbody>
</table>

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

USES OF FUNDS

- MANAGEMENT & ADMINISTRATION 7%
- FUNDRAISING 2%
- GRANTS & PROGRAMS 91%
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Special Thanks
The Community Foundation Board acknowledges the dedicated service of Carl Francis, whose term expired June 30, 2016.

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Connecting people who care with causes that matter, so their philanthropy makes a difference

now and forever.

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Jose Santiago, Business Affairs
Shaye Stuart, Advancement
Himali Vyas, Advancement
WCU Interns

Thanks to Alyssa Fingerman and Carla Moore for their staff service.
Thanks to Carl Kaplan, interim, Your Part-Time Controller.

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