



# 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.chescocf.org](http://www.chescocf.org) | [info@chescocf.org](mailto:info@chescocf.org)



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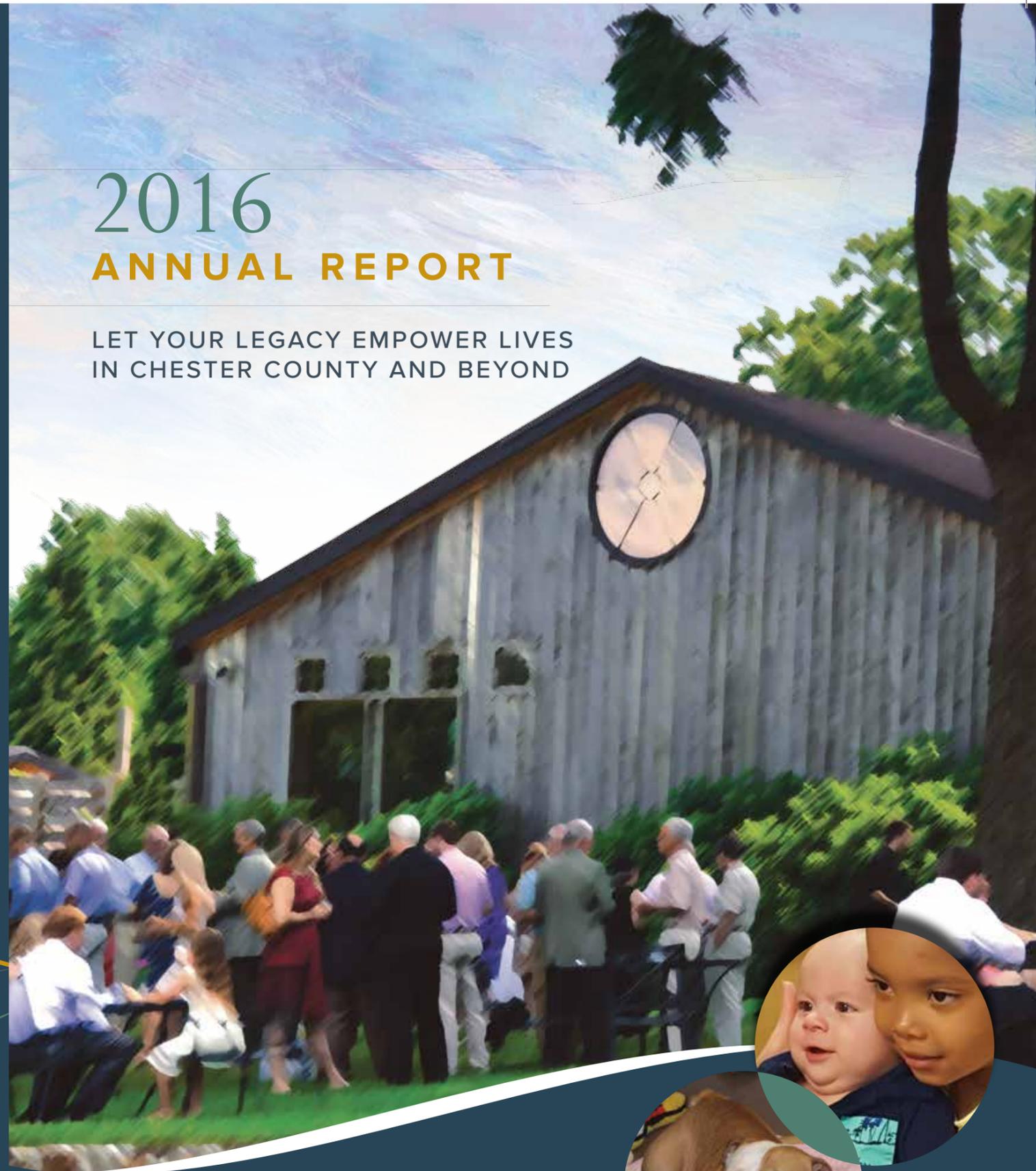
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Front Cover: Galer Winery & Estates Chair's Choice Event by Jessica Nicolosi; Main Line Animal Rescue; Dominic/Aliyah

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  
Academy of Vocal Arts  
Act in Faith of Greater West  
Chester  
Adventures In Missions  
Aidan's Heart Foundation  
Alianzas de Phoenixville  
ALS Hope Foundation  
American Association for  
Cancer Research  
American Cancer Society-East  
Central Division  
American Diabetes Association  
American Heart Association  
Andrew L. Hicks Jr. Foundation  
The Andrew McDonough B+  
Foundation  
ARC of Chester County  
Archmere Academy  
Art Partners Studio  
Association for the Colonial  
Theatre  
Atlantic Salmon Federation

Bank Street College of Education  
Barclay Friends  
Barn at Spring Brook Farm  
Baugman 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  
Camphill 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



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  
 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

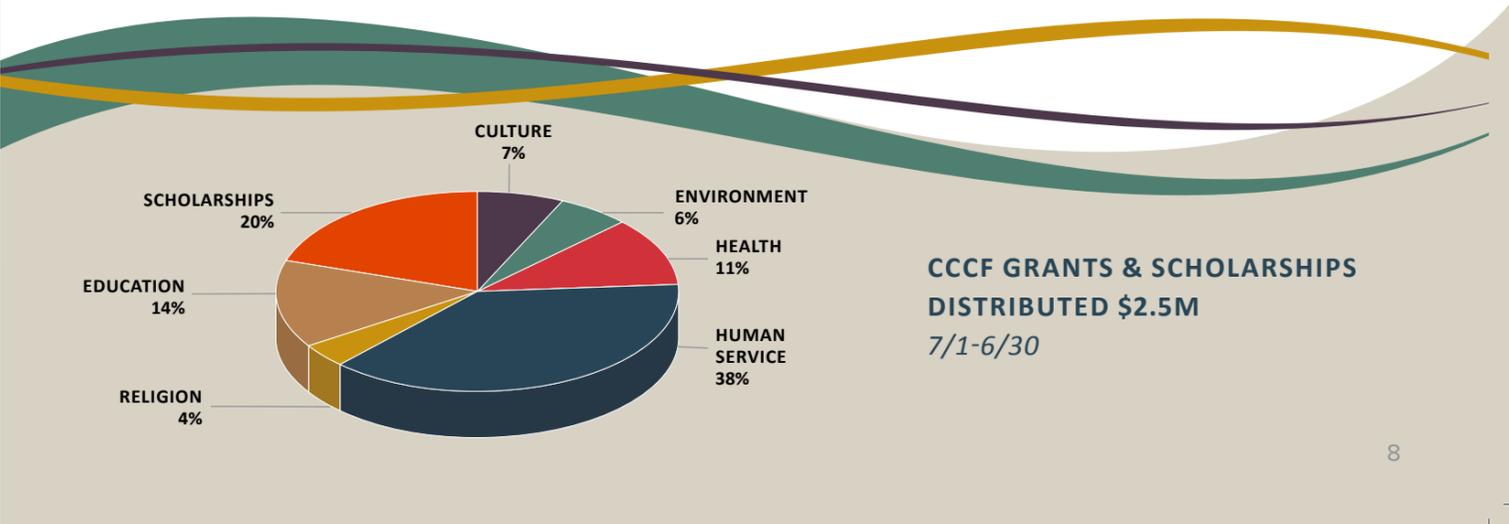
Public Safety Training Foundation  
 Quaker City Farmers Redeem  
 Riddle Health Care Foundation  
 Rowan University  
 Sacred Heart Church  
 Safe Harbor  
 Saint Elizabeth Special Projects Fund  
 Saints Philip & James School  
 Salvation Army of Greater West Chester  
 Salve Regina University  
 Samaritan's 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 Jenersville



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



# 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  
2093 Dutton Mill Road  
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.**

Wilmore 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 Wilmore 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 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.

Ron & Traci Bauguess, 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  
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Baxter Family Foundation, 2014  
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Beccaria Charitable Fund, 2006  
Believe, Play & Have Fun Foundation, 2015  
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Bugel Family Foundation, 1998  
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Carl & Sylvia Landis Foundation, 2012  
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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  
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Frees Family Foundation, 1998  
Ginger English/Christopher Fuga Memorial Foundation, 2007  
Good Fight Foundation, 2005  
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**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  
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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  
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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  
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K&M Foundation, 2003  
K9s4kids Charitable Fund, 2010  
Kathleen McBratnie Memorial Foundation, 2004

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Kevin Holleran Charitable Fund, 1999  
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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  
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Next Step Charitable Fund, 2014  
Nick Smiles on the Fine Arts Foundation, 2010  
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Richard & Carolyn Vermeil Foundation, 2010  
Richard & Lois Hodgson Charitable Fund, 1998  
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 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  
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 Shobaken Family Foundation, 1998  
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 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  
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 Valerie Lamb Smith Art Foundation, 1998  
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 Woody's Woods Memorial Foundation, 2003  
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Adolescent Awareness Foundation, 2012  
 Coatesville Community Health Foundation, 1999  
 Friends of Chester County Seniors Fund, 2010  
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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

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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

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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  
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 Canine Partners for Life Endowment Fund, 1999  
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 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  
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 Chester County S.P.C.A. Endowment Fund, 2005  
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 CVIM Edgar R. Lawrence, DDS Dental Endowment Fund, 1999  
 CVIM Gordon B. Hattersley, Jr. Endowment Fund, 1999  
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 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  
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 Home & Farm Antique Association Restricted Endowment Fund, 2000  
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 Interfaith Housing Assistance Corporation of Chester County Endowment Fund, 2014  
 Jenner's Pond Resident Charitable Endowment Fund, 2001  
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 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  
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 Phoenixville Community Education Foundation Endowment Fund, 2006  
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 Primitive Hall Endowment Fund, 1996  
 Priority One Foundation Endowment Fund, 2004  
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 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  
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 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





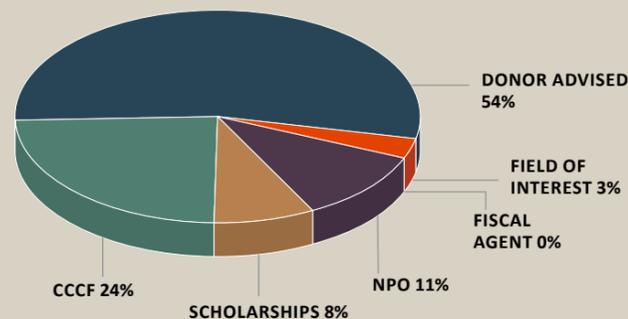
**SCHOLARSHIP FUNDS**

- 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*

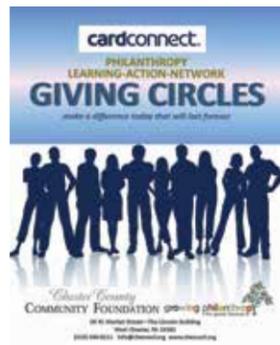
are the exclusive possession  
 of no one race nor religion.”

~ 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 Connolly & 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 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.*



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

### 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.

The Community Foundation accepts a wide variety of gifts including:

- Cash
- Publicly traded securities
- Closely-held and pre-IPO stock
- IRAs
- Life insurance with the Community Foundation as owner and/or beneficiary
- Remainder of a Charitable Remainder Trust
- Remainder of a Pooled Income Fund
- Lead gift of a Charitable Lead Trust
- Real estate

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.



### LEGACY SOCIETY MEMBERS

- |                               |                                                                           |                                 |
|-------------------------------|---------------------------------------------------------------------------|---------------------------------|
| Louis J. Beccaria, Ph.D.      | Zelinda LeBoutillier*                                                     | Anonymous of Coatesville (4)    |
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**Most Creative:** Gemelli Artisanal Gelato & Dessert Café – Mini Vanilla Apple Pie Gelato

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Cakes and Candies by Maryellen - Popcorn Crack

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Courtesy of Albert Lauber, Neuchatel Chocolates

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& 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.

## DONORS 7/1 TO 6/30

Due to space limitations, donations over \$250 are included in this listing. All donations are vital to us.

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Mrs. Barbara Ward  
Mr. & Mrs. Gilbert J. Welsford  
Mrs. Debra Whalon  
Ms. Adelaine Williams

**Chester County Council of the  
Boy Scouts of America Fund**

Boy Scouts of America -  
Chester County Council

**Chester County Estate  
Planning Council Fund**

American Cancer Society  
Belfint, Lyons & Shuman CPAs  
Briggs Auction  
Fox Rothschild  
Gawthrop Greenwood  
Haverford  
The Hickman  
Legacy Planning Partners  
MacElree Harvey

Main Line Services:  
Jefferson Health System  
Manning & Napier  
Martin's Financial Consulting/  
Ameriprise Financial  
The Philadelphia Trust Company  
Phoenixville Federal Bank & Trust  
Pine & Pine

**Chester County Estate  
Planning Council Marc P.  
Riddell Scholarship Fund**

May CCECP Social - Not Your  
Grandma's Bingo Proceeds  
May CCEPC Social -  
Wine Tasting Proceeds

**Chester County Fund for  
Women and Girls Grants  
Endowment**

Chester County Fund for  
Women and Girls  
Hufty Foundation

**Chester County Library  
Charitable Fund**

Mr. & Mrs. A.A. Deshmukh

**Christopher Fuga Memorial  
Foundation**

Ms. Mercedes Alexander

**Clay-Mir Charitable  
Foundation**

Mr. & Mrs. Frank J. Brewer

**Constance & D. Michael  
Briglia Memorial Foundation**

Mr. & Mrs. Michael Briglia

**CVIM Gordon B. Hattersley, Jr.  
Charitable Fund**

The Haverford Trust Company



**Daley Family Foundation**

Mr. & Mrs. Carl Roke

**Dana Marie Carr Memorial  
Scholarship Fund**

Phoenixville Jaycees Foundation

**Daryl E. & Martha J. Thomas  
Charitable Fund**

Mr. & Mrs. Daryl E. Thomas

**Decade to Doorways  
Charitable Fund**

Allegheny East Con. Cor. of the  
Seventh-Day Adventist Church  
Arc of Chester County  
Beiler-Campbell Realtors  
Linda L. Braceland  
CCRES

**Chester County Library  
Charitable Fund**

Cedar Knoll Builders  
Chester County Housing  
Authority  
Colorfin

**Delaware Valley Development  
Company**

Family Service of Chester County  
First Seventh Day Adventist  
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**Mr. Dale P. Gravett**

Dr. & Mrs. Robert H. Hanna  
HDC MidAtlantic  
Mr. Nate Hoffer  
Mr. Scot Horst  
McCright & Associates  
Minnie McNeil

**Ms. Jeanne Meikrantz**

Ms. Amber Miller  
Mission First Housing Group  
Mr. & Mrs. Karim Moussa  
Net Proceeds

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Phoenixville Community  
Health Foundation**

Mr. & Mrs. Joseph D. Raggazino  
Safe Harbor of Chester County  
Jane M. Shields, Esq.

**Mr. Kyle Shirkness**

United Way of Chester County  
Mr. Scott Zukin

**Dianne & Dave Elderkin  
Charitable Fund**

Mr. & Mrs. David Elderkin

**Don Gregory Stout Memorial  
Outreach Endowed Fund**

Mr. Michael A. Campbell  
Church of the Holy Trinity  
Ms. Carol Ann Clark  
Mrs. Kay M. Croll  
Mr. David G. Dorsett  
Mrs. Catherine A. Stout

**Dr. Alan G. Elko Legacy  
Scholarship Fund**

Dr. & Mrs. Alan G. Elko

**Dr. Clifford DeBaptiste  
Foundation**

Honorable Dr. Clifford E.  
DeBaptiste

**Dr. John H. Hewlett, III  
Scholarship Fund**

Mrs. Mary E. Hewlett

**Easttown Library Foundation  
Endowment Fund**

Anonymous (3)  
Diana M. Braunstein  
Janet A.K. & James M. Boyce  
Susan & Stephen D. Brown  
Lori W. & Kevin A. Butko  
Susan T. Deakins  
Deborah A. Dooling  
Easttown Library Foundation  
In Honor of Alan J. Silverman  
In Memory of Mary Alice Boyd  
In Memory of Mary L. Canito  
In Memory of Alan Joseph  
In Memory of Marge Worth Fara  
Jack H. Fisch  
C. Herbert Fry  
Marcia C. Herrick  
Dorrie & Bruce Hopper  
Terry & Bob Jenkins  
K. Maxine & Edward R. Jex





Kenneth W. & Margaret Rose G. Kistler  
David & Lisa Knight  
Donna Hutchison-Lang & Joel R. Lang  
Dennis P. & Mary Leeper  
Joanne W. & Arthur L. LeGar  
Kathryn E. & Craig A. Lewis  
Donald G. & Patricia Littlewood  
Margaret P. & James A. MacKenzie  
Timothy M. & Kerri L. Martin  
Margaret McReynolds  
A. Bruce & Stella Niccolo  
Kathryn H. & Alfred S. Pioggia  
In Memory of Jeff Preston  
Mark & Elaine H. Reber, Jr.  
Elizabeth M. & Joseph E. Reger  
Laraine & David W. Reid  
William E. Reimer, Jr.  
Karl A. & Marcie M. Romberger, Jr.  
The Ruegers  
Margaret Esther Sardinias  
Alan J. & Claudia E. Silverman  
Mr. & Mrs. William Sprague  
Thomas F. & Anne Toscani  
Estate of William F. Ward  
Mary E. Webb  
Mary A. Westervelt  
Robert E. Williams  
Sally Ann Wood  
The Woodland Sunshine Fund  
Kathleen W. & Edward M. Wylonis, III

**Eleanor & James Latta, Jr. Scholarship Fund**  
A. Duie Pyle  
Mr. & Mrs. Francis Granieri  
Mr. & Mrs. Peter A. Latta  
Mr. Alexander D Latta  
Mr. Hans Latta  
Ms. Molly Latta  
Ms. Sarah Latta

**Elizabeth G. Dorsett Memorial Scholarship Fund**  
Mr. David G. Dorsett

**Emily's Dash Fund**  
Mr. & Mrs. David W. Jones  
Mrs. Susan Luckan

**Eric Miller Memorial Charitable Fund**  
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Mrs. Lauren Dougherty  
Mrs. Nicole Epps  
Ms. Judith Goldschmidt  
Mrs. Kearra Harden  
Mr. Matthew Hopper  
Ms. Michele A. Lenhart  
Mr. & Mrs. Andrew R. Miller  
Dr. Donna Lucas Pellegrini  
Mr. & Mrs. Kenneth Sanders  
Mr. & Mrs. Cary Toner  
Mr. & Mrs. Gary Wessner

**Eugene J. & Mary DiFilippo Scholarship Fund**  
Mr. Leonard DiFilippo

**Everett Frank Legacy Foundation**  
Mrs. Everett Frank, Jr.  
Mr. Nate W. Turner

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Mr. & Mrs. John G. Donahue, Jr.

**Frees Family Fund**  
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Mr. Edward C. Auble  
Matthews Paoli Ford  
Paoli Business & Professional Association  
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Penn Liberty Bank  
Mr. & Mrs. J. Anderson Wilson

**Gettysburg Address Contest**  
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Weston Solutions  
Zukin Realty

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Mr. Sean Barber  
Mr. & Mrs. Gordon H. Bassett  
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Mr. Joe Benincasa  
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Crossfit Kazam  
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Hamilton Lane Private Equity Management  
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Mr. Dennis Jablonoski  
JRC Technical Sales  
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Mr. Christian Kallen  
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Miss Kristen Kelly  
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Kimberton Golf Club  
Kimberton Inn  
Honorable Jason E. Kobilka  
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Mr. David Langdale  
Ms. Kristin Lapicki  
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Ms. Alice Lindenauer  
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Molly Maguires Restaurant & Pub  
Net Proceeds  
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O'Grady's of Phoenixville  
O'Grady's of Souderton  
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Ms. Colleen M. Paolucci  
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Mr. Timothy Proud, Jr.  
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Mr. Christopher Roncase  
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Mr. Napoleon Stephenson  
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Robert Sylvia  
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Ms. Laura Szkaradnik  
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Mr. Brian Thorburn  
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Greater West Chester Rotary Foundation  
Rotary Club of West Chester

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Green Valleys Watershed Association

**Hailey Bear Memorial Fund**  
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Mr. & Mrs. John W. Bear  
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Mr. & Mrs. Michael A. DeHaven  
Mr. & Mrs. John David Dickenson  
Downingtown East Swim Team  
Mr. Bernard R Eisenhour  
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Robert W. Baird & Co.  
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**Harry Dunn Art Scholarship Fund**  
Estate of Thomas B. Address

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Mr. & Mrs. Jeffery D. Hutton

Mr. John P. Hutton  
Mr. & Mrs. Steven B. Hutton

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GBH Foundation  
Jessie & Harold Freeman Foundation  
Ms. Janet Zeis

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Ms. Carol Ann Clark  
Mr. & Mrs. Michael G. Louis

**James M. and Lois B. Herr Family Foundation**  
Mr. & Mrs. James M. Herr

**Jeffrey A. Wheet Memorial Scholarship Fund**  
Mr. Michael Wheet

**Jeffrey Gaunt Charitable Fund**  
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Mr. Brad Arnold  
Associazione Regionale Abruzzese  
Mr. & Mrs. Andrew Bellis  
Benchmark Properties Group  
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Mr. Tom L. Burnley  
Mr. Joseph Burns, Jr.  
Mr. & Mrs. Hugh E. Campbell, Jr.  
Chester County Pub Company  
Mr. Clayton Collins  
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 Doli Construction  
 Mr. & Mrs. Sean Dougherty  
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 Mr. & Mrs. Charles Ehlers  
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 Mr. Mike Ferrara  
 Fidelity Charitable Gift Fund  
 Mr. Mark Filchner  
 Full Spectrum Services  
 Mr. Jon Gatt  
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 Mr. Paul Getz  
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 Mr. Matthew MacNeal  
 Mr. Justin Marks  
 Mr. Arnold Marotta  
 Mr. & Mrs. Sean McKeon  
 Mr. Brian Mcklindon  
 Mr. Gary Mercer  
 Mitch's Market Street Gym  
 Net Proceeds  
 Mr. Shaughn Norton  
 Omega Systems Consultants  
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 Mr. & Mrs. Joshua M. Karnoff  
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 Mr. & Mrs. Henry M. Miller, Jr.  
 Mrs. Anna Mae Moore  
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 The Office Bar and Grille  
 Mrs. Lois Harvey Pollard  
 Mr. Dominic Ponzio  
 Ms. Karol K. Scheibe  
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 Split Rail Fence Store  
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 Mr. Leonard DiFilippo

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 Ms. Kimberly Duggan

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 Mr. & Mrs. Fred M. Fulton  
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 Dr. & Mrs. Nicholas Morris  
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 Mrs. Dan P. MacLauchlan  
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 Mr. & Mrs. Robert Nedwick  
 Ms. Loryn Nedwick  
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 Mr. & Mrs. Wesley O'Brien  
 Mrs. Bonnie Oswald

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 Pollart Electrical Sales  
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**Phoenixville Community  
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 Mouth Is Foundation**  
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**RE/MAX Main Line Charitable  
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**Richard and Carolyn Vermeil  
 Foundation**  
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**Richard I.G. Jones Legacy  
 Grants Fund of the Fund for  
 Chester County**  
 Mrs. Ann Lunger Jones

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 Mr. & Mrs. Robert E. Rigg

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 Mr. & Mrs. Adam F. Robinson  
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 Wiat  
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**Robert M. Price Memorial  
 Foundation**  
 Ms. Polly Gable

**Ruch Family Scholarship Fund**  
 Mr. & Mrs. Randall R. Ruch

**Safe Harbor of Chester County  
 Endowment Fund**  
 Mrs. Margaret M. McGill  
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**Samantha Lee Zajac Memorial  
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 Lasko Family Foundation

**Sarnacki Family Foundation**  
 Mr. & Mrs. Ray P. Sarnacki

**Stamm Consultancy  
 Charitable Fund**  
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**Stanley's Dream**  
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 Mr. Raymond Barbosa  
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 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](mailto: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

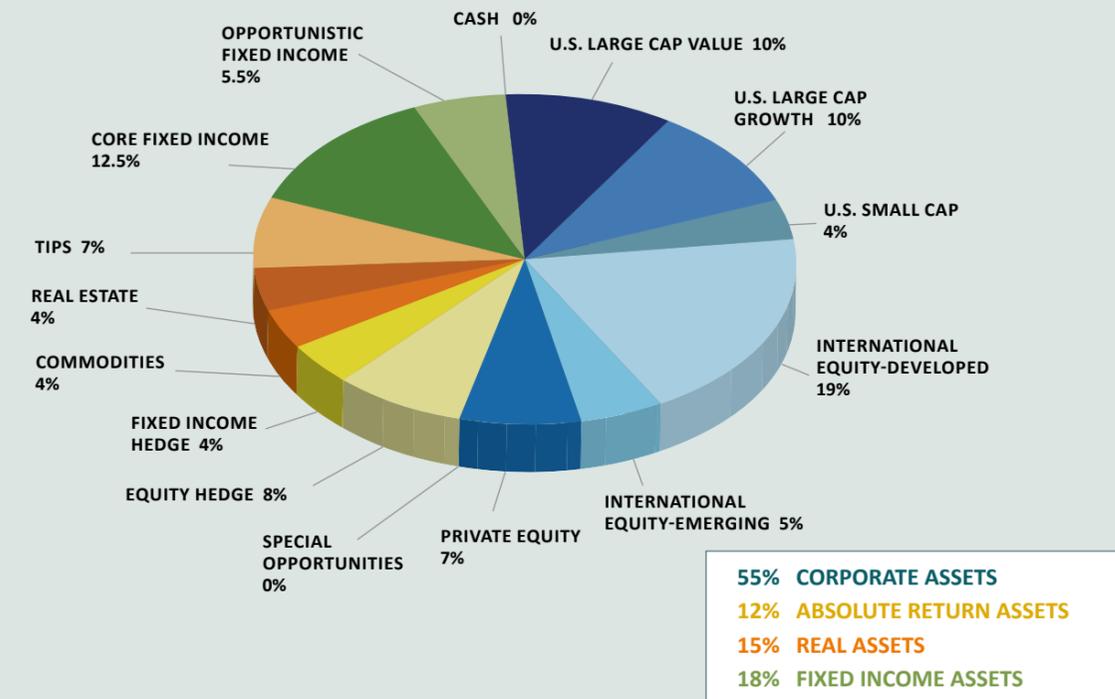
**Endowed Funds Long Term Target Return:** The Community Foundation desires a long term target return that provides portfolio growth, exceeds inflation, covers investment fee expenses, covers the Foundation's administrative fee, and covers the annual grant payout (of up to 5% of the previous fiscal year 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).

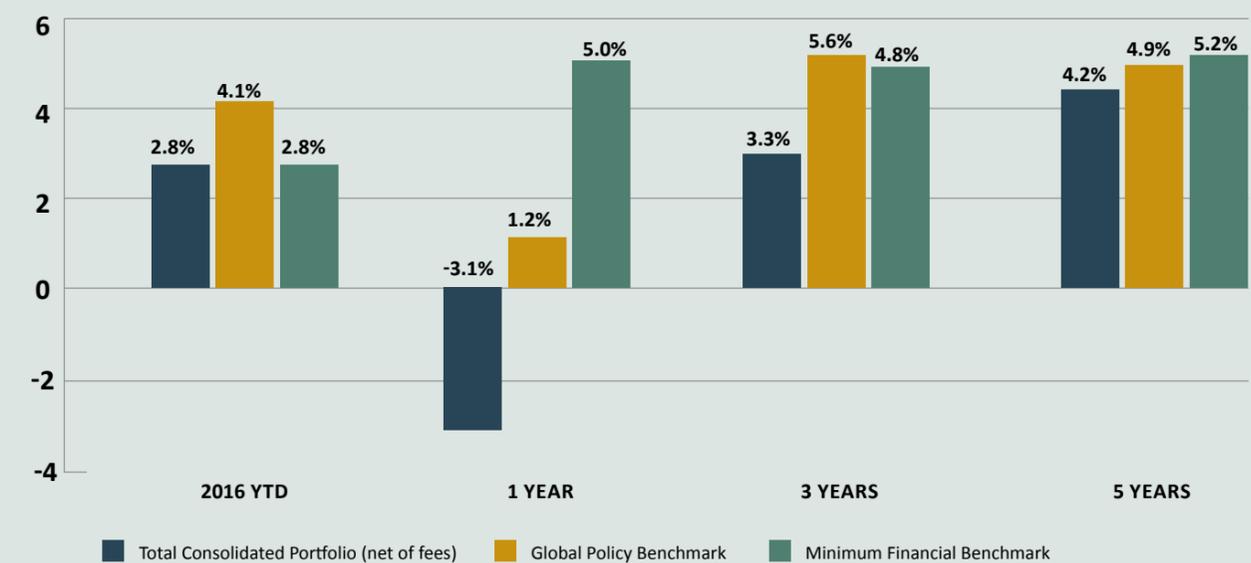
## POLICY PORTFOLIO STRUCTURE AND RANGES

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.



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

**WE HELP YOU FIND THE BEST CHARITABLE SOLUTIONS...**

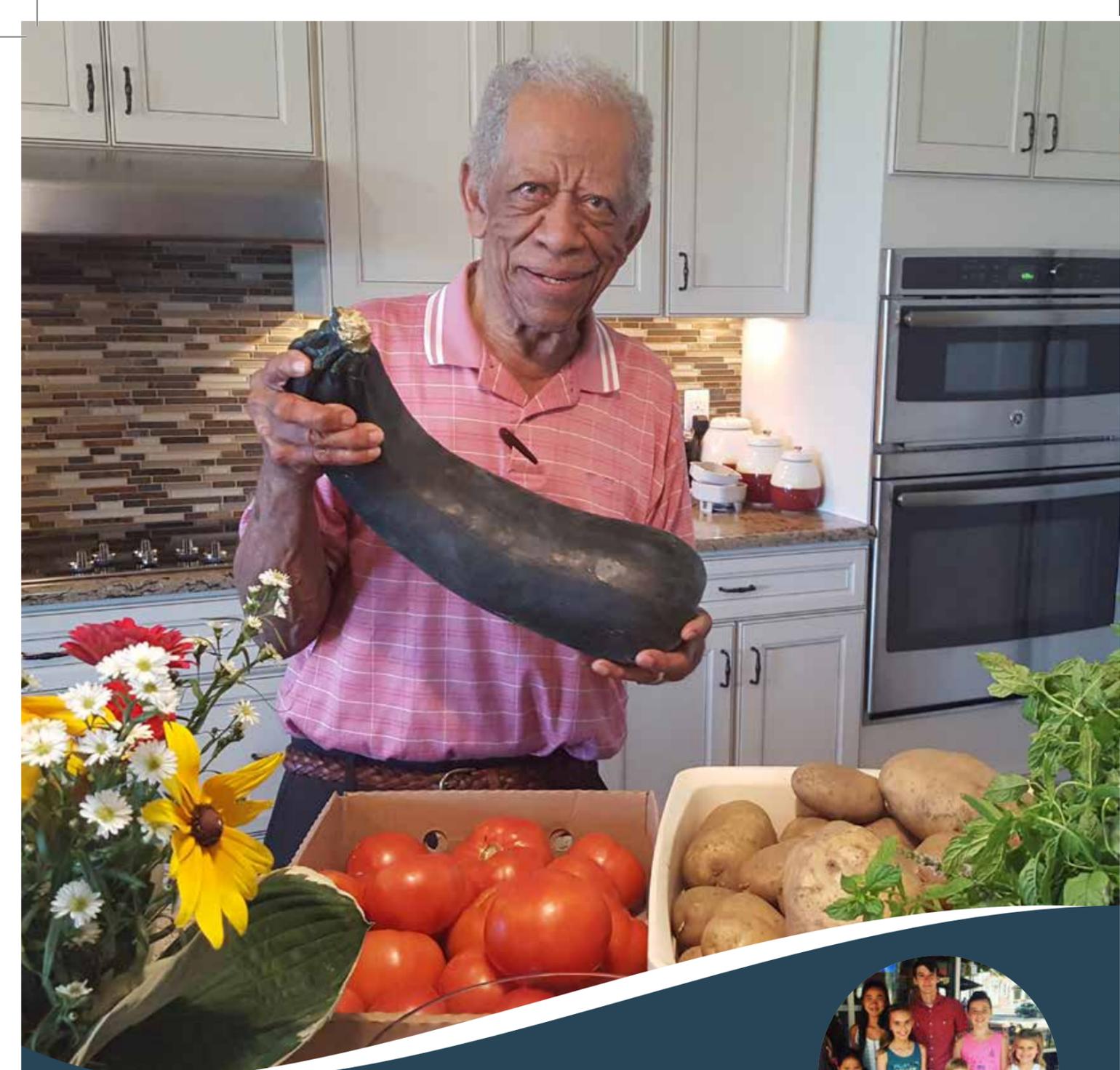
Individuals increasingly expect their professional advisors to assist them with strategic philanthropy as part of overall planning.

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

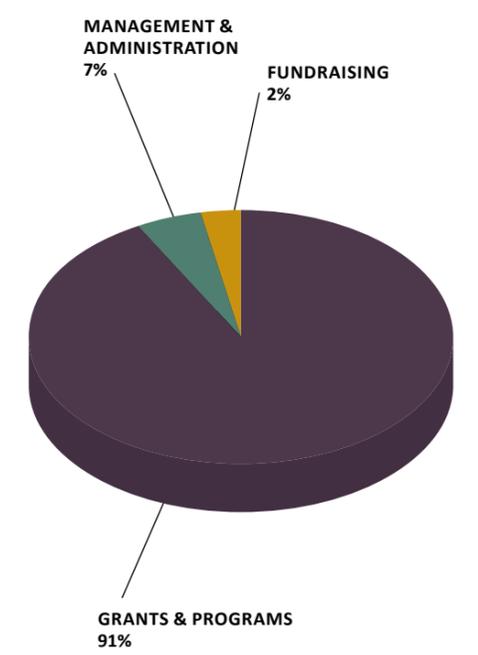


## Finances

**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
<b>TOTAL ASSETS</b>	<b>\$46,696,243</b>	<b>\$48,508,594</b>
<b>LIABILITIES</b>		
Accounts payable & accrued expenses	\$71,676	\$70,893
Annuities payable	265,644	349,186
Not-for-profit endowments	4,669,986	4,944,165
<b>TOTAL LIABILITIES</b>	<b>\$5,007,306</b>	<b>\$5,364,244</b>
<b>NET ASSETS</b>		
Unrestricted-board designated	\$41,650,882	\$43,089,142
Temporarily restricted	38,055	55,208
<b>TOTAL NET ASSETS</b>	<b>\$41,688,937</b>	<b>\$43,144,350</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$46,696,243</b>	<b>\$48,508,594</b>

### USES OF FUNDS



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





## Board Of Directors

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CEO, Rigg Darlington Group  
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Shareholder, Rainer & Co  
Vice Chair

Winifred Moran Sebastian, Esq.  
Partner, McMichael, Heiney & Sebastian  
Vice Chair

Kathy Dean-Bradley, CPA  
Principal, Belfint Lyons & Shuman  
Corporate Secretary/Treasurer

William J. Gallagher, Esq.  
Partner, MacElree Harvey  
Immediate Past Chair

### DIRECTORS

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.

David Elderkin  
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

Pamela Leland, Ph.D.  
Executive Director, The Hickman

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Partner, Lamb McErlane

Anthony Morris, Esq.  
Partner, Buckley, Brion, McGuire & Morris

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Managing Director, SRS Capital Advisors

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Partner, Larmore Scarlett

Karen Simmons, ex officio  
President/CEO  
Chester County Community Foundation

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Louis J. Beccaria, Ph.D.

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Charles Lukens Huston III  
Elizabeth Ranney Moran  
Eva L. Verplanck, Ph.D.  
Carol Ware, Ph.D.

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

## Committees

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.

### FINANCE COMMITTEE

**Kathy Dean-Bradley, CPA, Chair**  
Carol A. Clark  
Michael R. Horak, CFA  
Douglas Pacitti, CPA  
Cynthia Sineath Ray, CPA  
Louise Schorn Smith, CPA, CMA, MBA

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Meg Freeman  
William J. Gallagher, Esq.  
Kevin Holleran, Esq.  
Anthony Morris, Esq.  
Winifred Moran Sebastian, Esq.  
Eva L. Verplanck, Ph.D.

### GRANTS COMMITTEE

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Louis J. Beccaria, Ph.D.  
Meg Freeman  
Ruth E. Kranz-Carl  
Pamela Leland, Ph.D.  
Michael G. Louis, Esq.  
Gerardina Martin  
Joanne Peskoff Bear, Esq.  
Eva L. Verplanck, Ph.D.

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Richard C. Clark, CFP®, ChFC®  
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Francis Brinton Jacobs, II  
Michael B. Karwic, CFP, CRPC  
Matthew D. Kelly  
Tracy Musser  
Patrick South, CFA  
Louis N. Teti, Esq.  
Philip C. Wagner, CFA

### PHILANTHROPIC LEARNING-ACTION-NETWORK STEERING COMMITTEE

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Scott Hattersley  
Rachelle Lusk, Esq.  
Michelle Legaspi Sanchez  
Karen Sarnacki

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Donna H. Melton  
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William Pugh, CFRE  
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Sonia Stamm  
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April L. Charleston, Esq.  
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Douglas L. Kaune, Esq.  
Kristine Kimmell, Esq.  
Timothy Knauer, Esq.  
Rachel Lusk, Esq.  
Donald B. Lynn, Esq.  
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Stacey Willits McConnell, Esq.  
John F. McKenna, Esq.  
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Tracy Musser  
Michael Reese  
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Chris Valerio, CFA  
David Vermeil





## Staff

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**President/CEO**

Beth Harper Briglia, CAP®  
**Vice President, Donor Services & Grantmaking**

Robert (Bob) Ferguson  
**Controller**

Stephenie Stevens  
**Advancement Manager**

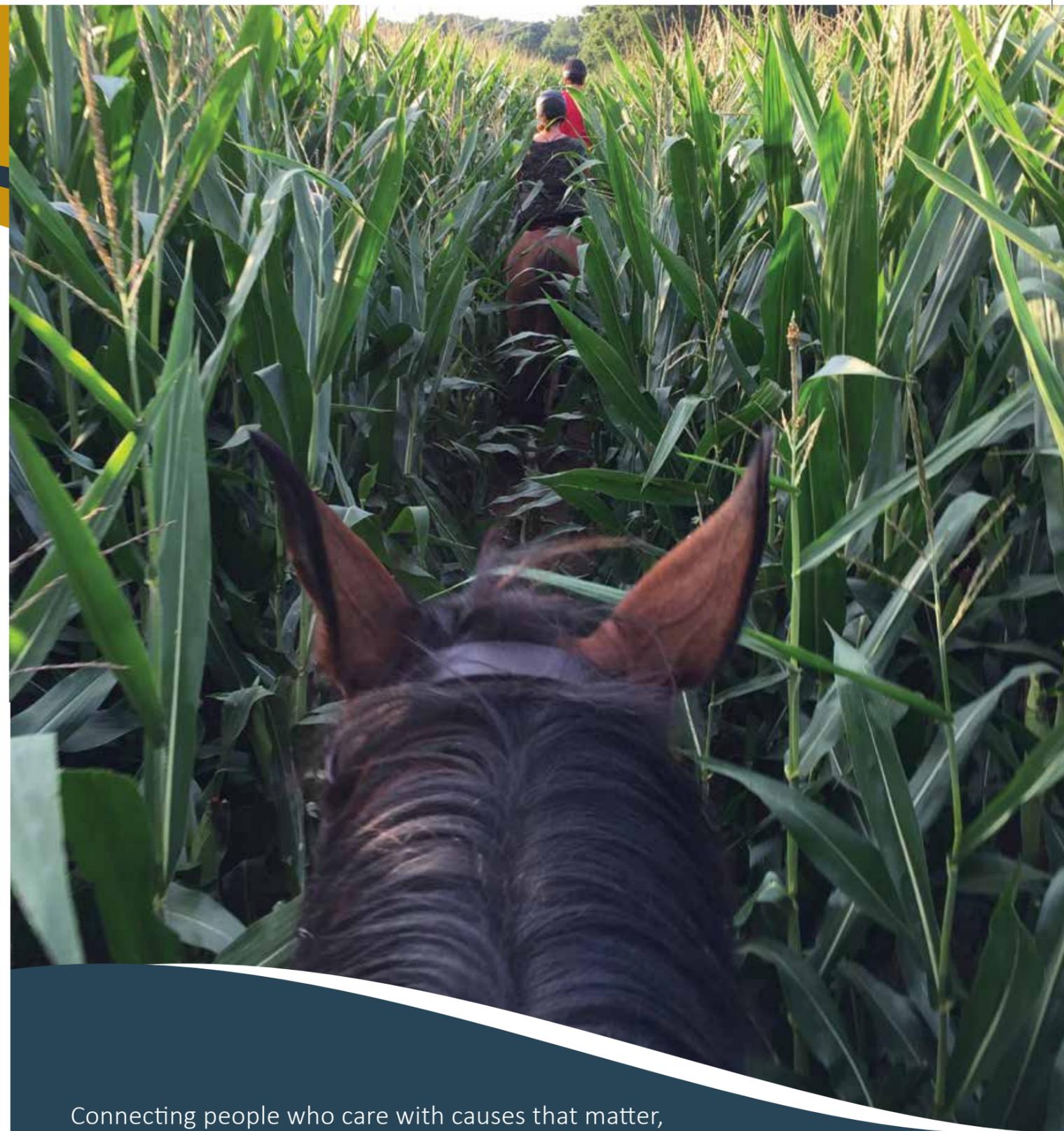
Hailey Blessing  
**Advancement Associate**

Kevin Baffa  
**Administrative Assistant**

Gigi Elashram, Donor Services  
Jacob Naseef, Business Affairs  
Dwayne Robinson, Business Affairs  
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.



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