What is the Community Foundation?

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

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

The Chester County Community Foundation has three unique features:

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

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

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Connecting people who care with causes that matter, so philanthropy makes a difference now and forever.
The Community Foundation focuses on long-term legacy philanthropy, so that charitable assets are available to help nonprofits thrive in challenging as well as prosperous economic times. Over the past year, we have deepened and refined our:

- **Family & Individual Philanthropy Suite of Services**, hosting Giving Circles to engage a more diverse array of emerging philanthropists
- **Nonprofit Endowment Suite of Services**, enhancing our reach to nonprofit staff and Board members
- **Professional Advisor Outreach**, engaging estate planning attorneys, CPAs and wealth managers in legacy philanthropy

During the past year, we:

- proudly awarded $2.3 million in grants and scholarships
- welcomed 19 new funds, bringing the total number of funds to 355
- received 2,422 contributions totaling $4.1 million. Individual generosity grew, as this is a 30% increase from last year in terms of dollars donated.

Since our 1994 founding, $36 million has been awarded via 8,711 grants and scholarships.

Philanthropy is a vitally important way for citizens to exemplify their priorities for a caring, civil society, and to provide programs and services that are customized locally.

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

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

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

Karen A. Simmons  
President/CEO

Inspire Legacy Philanthropy
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 grants 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 FY2017, $3.2 million in grants and scholarships was awarded to address needs in our community. 548 grants totaling $1,900,000 and 201 scholarships totaling $400,000.

**GRANTEES**

Acadia Family Center  
Act in Faith of Greater West Chester  
Adult Care of Chester County  
Aidan’s Heart Foundation  
Alzheimers’ Foundation of America  
American Association for Cancer Research  
American Cancer Society East Central Division  
Andrew L. Hicks Jr. Foundation  
ARC of Chester County  
Archmere Academy  
Art Partners Studio  
Atlantic Salmon Federation  
Avondale Fire Company  
Avondale Fire Company EMS Division  
Barclay Friends  
Barn at Spring Brook Farm  
Barnstone Arts for Kids  
Bee Positive Foundation  
Bethel AME Church  
Bethesda Project  
Bishop Shanahan High School  
Blue White Scholarship Foundation  
Boy Scouts of America, Chester County Council  
Breddywine Baptist Church  
Breddywine Conservancy  
Breddywine Health Foundation  
Breddywine Red Clay Alliance  
Breddywine Valley SPQA  
Bridge Academy & Community Center  
Cabrini College  
Cairn University  
Calvin Elementary PTA  
Calvary Chapel of Delaware County  
Calvary Fellowship Church  
Camp Dreamatcher  
Camp Hill Special School  
Canine Partners for life  
Carter CDC/Joseph & Sarah Carter Community Development Corp.  
Casa Guanajuata  
Catawba Academy  
Cathedral Church of Saint Paul  
Charles A. Melton Art & Education Center  
Chemical Heritage Foundation  
Chess Penn Health Services  
Chester County 2020  
Chester County Art Association  
Chester County Bar Foundation  
Chester County Food Bank  
Chester County Fund for Women & Girls  
Chester County Futures  
Chester County Hospital Foundation  
Chester County Library  
Chester County Public Safety Training Foundation  
Chester County Women’s Services  
Chester County’s Children  
Children’s Corner Week Association  
Children’s Hospital of Philadelphia  
Christ Community Church  
Christian Care Health System  
Citizen Advocacy of Chester County  
City Gate  
The Clinic  
Coatesville Center for Community Health  
Coatesville Community Education Foundation  
Coatesville Parents Music Club  
Coatesville Youth Initiative  
Coker College  
Community Coalition  
Community Volunteers in Medicine  
Concordia Fire & Protective Association  
County on Foundations  
County Corrections Gospel Mission  
Crime Victims’ Center of Chester County  
CRU  
Daemion Counseling Center  
Daniel Foundation  
David’s Drive 831  
Daylesford Abbey  
Decade to Doorways  
Delaware County Community College Educational Foundation  
Delaware Riverkeeper Network  
Delaware Valley Science Fairs  
Diane Matthews Dance Studio  
Dickinson College  
Diocese of Venice in Florida  
Domestic Violence Center of Chester County  
Downingtown Area Senior Center  
Downingtown Library  
Elizabethtown College  
Evergreen State College Foundation  
Fairview Evangelical Presbyterian Church  
Faith in the Future Foundation  
Family Promise of Southern Chester County  
Family Service of Chester County  
Family Stations Radio  
First Presbyterian Church  
Forgotten Cats  
Foundation at Great Valley  
Foundation for Learning in Tredyffrin/Easttown  
Foundation for Lee County Public Schools  
Fox Chase Cancer Center  
Fred’s Footsteps  
French & Picking creeks Conservation Trust  
Friends Association for Care & Protection of Children  
Friends Home in Kennett Square  
Friends of Springton Manor Farm  
Garage Community & Youth Center of Kennett Square  
Garage Community & Youth Center West Grove  
Girl Scouts of Eastern Pennsylvania  
Girl Scout stuffing a Freedom Valley Gift  
Good Fellowship Ambulance  
Good Neighbors Home Repair  
Good Samaritan Shelter  
Good Works  
Great Valley Nature Center  
Green Valley Association  
Grimes A.M.E. Church  
Growth Ministries  
Habitat for Humanity of Chester County  
Haiti Partners  
Handi-Crafters  
Harvey Kaufman Memorial Scholarship Fund  
Haverford College  
Helfer International  
The Hickman  
Hildale High School Alumni Association  
Historic Kennett Square  
Honey Brook Community Library  
Honey Brook Food Pantry  
Hope Springs Equestrian Therapy  
House of His Creation  
IHS Global  
Immaculata University  
Interfaith Housing Assistance Corporation  
Jenner’s Pond  
Jersey Surf  
Jenius Center at Wernersville  
JEVS Human Services  
Justice Rescue  
KFs For Warriors  
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 Food Cupboard c/o KACS  
Kennett High School  
Kennett Library  
Kennett Symphony of Chester County  
Kennett Underground Railroad  
Kimberton Waldorf School  
Kutztown University Foundation  
La Comunidad Hispana  
The Land Conservancy for Southern Chester County  
LGBT Equality Alliance  
Lifeline Family Center  
Living Beyond Breast Cancer  
Living Breath Foundation  
London Grove Friends Meeting  
Lord’s Pantry of Downingtown  
Lyme Disease Association of SE PA  
Magpie Rehabilitation Hospital Foundation  
Maine Coast Heritage Trust  
Maternal & Child Health Consortium  
Metro Lacrosse  
Michael’s Way  
Midford Middle School  
Mill at Anselma Preservation  
Educational Trust  
Mom’s House  
Mount Desert Island Hospital  
Mount Desert Land & Garden Preserve  
Musicipia  
Napa Valley College Foundation  
National Brain Tumor Society  
Natural Land Trust  
Neighborhood Hospeic  
New Found Freedom Foundation  
New York City Relief  
New York Yacht Club Foundation  
Nottingham County Park  
Open Heart  
Open Land Community  
Otho Davis Scholarship Foundation  
Oxford Area Neighborhood Services Center  
Oxford Educational Foundation  
Oxford Senior Center  
Paoi Fire Company  
Paoi Hospital Foundation  
Parksburg Library  
Parksburg Point  
Partners in Outreach  
Peacemaker Center  
Peirce Middle School  
Penn State Brandywine  
Pennsylvania-Home of the Sparrow  
People’s Pantry at Church Road  
Petra Community Housing  
Philabundance  
Philadelphia Ronald McDonald House  
Phoenixville Area Children’s Learning Center  
Phoenixville Area High School  
Phoenixville Area Middle School  
Phoenixville Area School District  
Phoenixville Community Education Foundation  
Phoenixville Community Health Foundation  
Phoenixville Jaycee Foundation  
Phoenixville Women’s Outreach - The House  
Planned Parenthood of SEPA  
Police Athletic League of Philadelphia  
Pottsgrove Middle School  
Pottstown Cluster of Religious Communities  
Project Home  
Quest Therapeutic Services  
Redeem  
Riddle Health Care Foundation  
Sacred Heart Church  
Safe Harbor  
Safetly Agriculture Villages & Environment  
Saints Philip & James School  
Salvation Army of Greater West Chester  
San Jose State Spartan Foundation/football  
Sandhills Children’s Center  
Save the Bay  
Schenkville River Heritage Center  
SE PA Autism Resource Center  
Serving In Mission  
Shake It Off  
SILC  
Sisters of the J.H.M.  
Souther Chester County Emergency Medical Services  
St. Agnes Roman Catholic Church  
St. Mary’s Franciscan Shelter  
St. Paul’s Baptist Church  
St. Peter’s Lutheran Church  
St. Timothy’s School  
Strayer Middle School  
Stroud Water Research Center  
Sisters Peter & Paul Ukrainian Catholic Church  
SurgiCorps International  
Survey Services for Seniors  
Team CMMD
"HOW WONDERFUL THAT NO ONE NEED WAIT A SINGLE MOMENT TO IMPROVE THE WORLD."

- Anne Frank
Door Opener Award

Spotlighting stellar professional advisors who bring legacy philanthropy to the attention of their clients and colleagues

MICHAEL A. DEHAVEN, CPA

The Door Opener Award recognizes professional advisors who support and encourage legacy philanthropy. The Community Foundation is pleased to spotlight Michael A. DeHaven, CPA as this year’s Door Opener, most notably for his recommendation that the Latoff Committee (highlighted in this annual report) consider the Community Foundation as a vehicle for its philanthropy.

Mike is a shareholder with Rainer & Company, Certified Public Accountants and Business Consultants with offices in Newtown Square and West Chester. Founded in 1954 by Francis J. Rainer, Rainer & Company provides local, national and multinational companies, non-profit and government organizations, and individuals with a full range of services including comprehensive tax strategies, compliance and attest services, employee benefit plan audits and more.

Mike is also a member of the firm’s business consulting division. He has been involved in various engagements including mergers and acquisitions, fraud investigations, and evaluations of financial and operational control procedures.

Mike and his wife, Kim, live in Westtown Township with their three boys, Chris, Colin and Regan. Amidst his professional and family responsibilities, Mike is an active community volunteer. Prior to serving as a Board member at the Community Foundation, he served as Chair of the Board of the Chester County Chamber of Business and Industry. Mike currently serves on the Boards of the Chester County Economic Development Council; Mental Health Partnerships; and the Central and Western Chester County Industrial Development Authority. Mike is an active member of Sts. Simon and Jude Parish in West Chester.

Mike is clear: “Community engagement is vitally important to me, for myself, my family and my business. We all have vested interest in the success of our community. I believe it’s important to step in and help out, and give time, talent and treasure. It’s a winning combination.”

RAINER & COMPANY
Certified Public Accountants and Business Consultants

Michael A. DeHaven, CPA
2 Campus Boulevard, Suite 220, Newtown Square, PA 19073
www.rainer.com • mdehaven@rainer.com • (610) 353-4610

Door Opener Honorees

2004 Stephen McGann, CTFA, AEP
2005 L. Peter Temple, Esq.
2006 Michael B. Karwic, CFP, CRPC, AEP
2009 Honorable Dr. Clifford DeBaptiste
2010 William J. Gallagher, Esq.
2011 Duke Schneider, Esq.
2012 Robb S. Frees, CIC
2013 Richard Clark, CPA, CFP®, ChFC®
2013 Stephen Olsen, Esq.
2013 Timothy Knauer, Esq.
2014 Louis N. Teti, Esq.
2015 Kurt Kunsch
2016 Michael F. Connelly
2016 John R. Twombly, Jr., Esq.
2017 Michael A. DeHaven, CPA
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 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.
In 1991, Mandy told her father that she had started a business selling Danish shoes. "He asked me what I knew about selling shoes. 'Nothing,' I said. He told me he was an acquaintance of Hadley Griffin, the former CEO of Brown Shoes, which at the time was probably the biggest shoe company in America, and asked if I'd like to meet him. I'm a card-carrying introvert and the thought of going to St. Louis to network with a CEO was terrifying. But what a great opportunity to get my foot in the door. Before I could stage a protest, my dad picked up the phone and I had an appointment with the folks at Brown. We met at 8 a.m. the following Monday."

"After a kindly 'pat on the head,' Hadley told me that the footwear industry was a man's world and offered to take over our agreement with the manufacturer and give us a royalty. I thought about it for about four seconds and realized there must be something to my idea and I should stay the course. Hadley couldn't have been more gracious. He gave me two pieces of advice. He said, 'Stop selling shoes out of the back of your car' and 'Stay gourmet. Know your niche.'"

Fortunately, Dansko was at the right place at the right time. In the early 1990s, Birkenstock was coming out of the granola/health food closet, and several other Euro-comfort brands like Ecco and Mephisto were just arriving on the US market. Peter says, half-joking, "Dansko had tremendous editorial exposure because the clogs were so odd looking, and the media love stories about people who know nothing and try to work their way into the business."

For a long time, Dansko had only a handful of employees at its West Grove location. "Mandy was COE, Chief of Everything. I was COEE, Chief of Everything Else," Peter explains. "Mandy concentrated on product development and marketing, and I looked after facilities and keeping a roof over everyone's head."

Beyond its initial clog collections, Dansko expanded to include sandals, boots, and an entire range of casual and career shoes for women and men. Dansko footwear became highly regarded for incredible durability, outstanding stability, ergonomically contoured footbeds and fashionable style. Dansko became a favorite of well-heeled doctors, nurses, teachers, and those in the hospitality industry.

Despite their keen focus on Dansko, Mandy and Peter's personal community philanthropic involvement grew. And because "when you have something great to share, you share it," Dansko's corporate charitable involvement grew as well.

Mandy reflects, "My grandparents created a private family foundation in 1992 so that their descendants could learn about philanthropy and actively participate in carrying on their tradition of trying to help make this a better world. Our family foundation brings us together to discuss our passions, learn more about what's going on in the world, and prioritize where our resources can make an impact. I served as its Chair for many years, and had its mission and structure in mind when we launched the Dansko Foundation in 2003."

Stepping up to the challenge, the Dansko Foundation Board is staffed entirely by employees. They review grant proposals, rate priorities, go on site visits, review organizational health and need, and distribute funds to nonprofits.
To date, the Dansko Foundation has granted more than $725,000 to over 100 nonprofits in the Delaware Valley. Funding has helped provide meals, shelter, clothing, household goods and animal rescue services, as well as educational, therapeutic and recreational programs.

Additionally, Dansko employees can double the value of their charitable donations through the Dansko Foundation’s matching grants program. Taking it a step further, the majority of Dansko employees participate in company-organized service days. Dansko employees plant trees, paint playgrounds, clean highways, build houses and cook for families. Annually, each employee is given 20 hours of paid time off to volunteer. Amplifying the impact, Dansko donates the equivalent of that employee’s wage-hours to the nonprofit charity for which they volunteer.

In alignment with Dansko’s core business, funding for the Foundation is generated internally with proceeds from shoes sold in the Dansko Company Store in West Grove, so that purchases help those in need.

Visitors to the Dansko Foundation website see the corporate values clearly proclaimed: “At Dansko, we step up in support of the community. Our goal is to leave the world a better place than we found it. If that means building another house... pass us the hammer and nails!”

In 2005, Dansko reached a milestone: 100 employees and $100 million in revenue. Mandy and Peter realized that if they were to be moved to another location, it would be a reflection of their business philosophy. “We met with an attorney who floated the idea of an Employee Stock Ownership Plan (ESOP). We could set up a stock ownership trust for the benefit of our employees where shares would be released over time into employees’ accounts.”

Over the next few years, the focus was on Sustainability in the broadest sense of the word. Dansko hired additional personnel with more experience in the footwear industry, dedicated the company even more fully to socially responsible business practices, and designed and built a new corporate headquarters according to LEED (Leadership in Energy and Environmental Design) certification standards.

In 2007, Dansko became a founding B Corporation, submitting to a rigorous monitoring process by the nonprofit B Lab that measures how well companies meet high standards of social sustainability, environmental responsibility, accountability and transparency. B Lab certifies companies based on how they create value not only for their shareholders, but also for their employees, their local community and the environment.

In 2008, 150 Dansko employees joyfully moved into their new LEED Gold Certified corporate headquarters: the first in Chester County. Dansko’s main lobby is a Living Wall of indoor plants and trickling water; the roof is covered with 1,100 solar panels along with shrubs and grasses that provide insulation; and the parking lot has a pervious surface that returns rain to the natural water table. Solar and wind energy, energy-saving lighting, and recycling are paramount.

Along with multiple eco-friendly building materials, Dansko’s corporate headquarters features quality-of-life components including meditation rooms, a green rooftop patio, and a gym with locker rooms and showers. All this, complimented by stunning, thoughtful, eco-friendly, fair trade artwork and handmade crafts.

In 2010, Mandy and Peter accelerated their transition to employee ownership and sold 100% of their shares to the ESOP. Mandy explains, “Employees are the lifeblood of our business; they are the business. It made total sense to allow employees to share in the wealth they helped create, to share in both the opportunities and responsibilities of ownership.” The ESOP truly demonstrates Mandy and Peter’s authentic commitment to the triple bottom line: engaging in business dealings that are win + win + win for people + the planet + profits.

Dansko continued to thrive. By 2013, Dansko employed 180 people and opened a new 200,000 square foot distribution center in West Grove. Looking for something meaningful to do with Dansko’s former corporate headquarters, Peter discovered a nonprofit that sought a distribution center in the mid-Atlantic region. Project C.U.R.E. identifies, solicits, collects, sorts and distributes donated medical equipment and supplies to developing countries worldwide. Nationally, Project C.U.R.E. ships an average of three sea-going cargo containers of life-saving aid each week. With great humility, Peter explains, “We are fortunate to be able to have a small role here, helping Project C.U.R.E. with its mission: to deliver health & hope to the world.”

By 2015, Mandy and Peter created and initially funded the Cabot-Kjellerup Foundation, to help them structure their own personal philanthropy. “We made 36 grants in our first full year. It’s a great way for my daughter Mette Kjellerup to get involved in the community and our philanthropy,” enthuses Peter. “The U.S. system is so different from the Danish system. Here, nonprofits serve as a safety-net for social services, education, and environmental needs. It is a totally different way of handling large social issues.” Grants focus on local and global causes near and dear to Mandy and Peter, including animal and wildlife protection, nature conservation, clean water, nutrition, poverty, microfinance and social enterprise.

In 2016, Mandy turned over the responsibilities of President to Jim Fox, Dansko’s CFO of nearly 10 years. Mandy continues as CEO and Board Chair. Peter continues as Vice President and COEE. Jim has big shoes to fill. Mandy explains, “Sustainability has always been a priority for us. Leadership transitions are an important part of the process.” Adds Peter, “We’ve built a company that can move through time, rooted in our values, while strong, smart and brave enough to create its own future.”

Mandy and Peter eagerly anticipate more outward-facing roles going forward, with greater focus on and participation in nonprofits and local communities. This is tremendously good news for the charitable community and social benefit organizations.

As a charitable leader, Mandy has a long history of service on the Board of the Two Ten Footwear Foundation, helping families in the footwear community with financial, social and educational support. Since 1997, Mandy has also served in numerous volunteer leadership capacities with the YMCA of Greater Brandywine and the Jennersville YMCA, including co-chairing the Jennersville Capital Campaign. In Fall 2017, Mandy joined the Board of the Chester County Hospital.
Mandy and Peter also have a long-standing association with Stroud Water Research Center. In 1986, they visited Stroud, simply to learn if they could help. They became early funders of the Leaf Pack Experiment Kit, which is now used worldwide by volunteers to determine the health of streams and understand their ecology. Mandy served two terms on the Board of Stroud, and when her term expired in 1997, Peter joined the Board. Mandy and Peter have an enduring commitment to Stroud’s work, locally and globally.

In addition to Stroud, Peter currently serves on the Board of the Chester County Food Bank and The Land Conservancy for Southern Chester County. “I am intensely drawn to immersing myself in the inter-relationships of water, land and food, and how it all fits together locally and globally. There is so much important work to be done here, and the interdependency and social benefit stakes are extremely high.”

Mandy and Peter are hard-wired to commit their boundless energy, insights, experiences and resources to make a difference, and to bring new strategic opportunities to fruition. “We are part of our community, and it is imperative to be involved—locally, regionally, nationally and internationally. Engaging with the community adds perspective to our lives. It’s Energizing. Contagious. Enriching.”

Mandy Cabot and Peter Kjellerup: Doing the right thing, every step of the way.
The Community Foundation currently is entrusted with 355 funds. The 19 newest funds are in colored print. The average fund size is $140,000. 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 Card Connect Giving Circle Grantmaking Funds, 2016
- CCCF Card Connect Giving Circle Member/Operating Fund, 2016
- CCCF Delta C. Large & Dennis C. Large Memorial Foundation, 2005
- CCCF Diane & Thomas Lafferty Fund to Benefit Wistar Institute, 1999
- CCCF Fund for Coatesville, 2000
- CCCF Giving Circle Grantmaking Funds, 2016
- CCCF Grantmaking Fund for ChexCo Environment, 2001
- CCCF Grantmaking Fund for ChexCo, 1998
- CCCF Hutton Grantmaking Fund for ChexCo, 2017
- CCCF HARB Gettyburg Address Context, 2004
- CCCF Jordan Award Fund, 2001
- CCCF Josiah Hibberd Award Honoring Margareta Durnall Hibberd, 2013
- CCCF Lincoln Biography Building Endowed Fund, 1996
- CCCF Lincoln Building Monitoring Fund, 1999
- 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 Fund, 1994
- CCCF Parkesburg Environmental Foundation, 1998
- CCCF Summer Fundraiser Fund, 2013
- CCCF Sweat Charity, 2013
- CCCF West Chester Optimist Scholarship Fund, 2011
- CCCF West Chester Trust & Relief Endowed Fund, 2000
- CCCF WYCA Chester County Scholarship Fund, 2010

**DONOR ADVISED FUNDS**
- Anonymous (2)
- 4Kids2C Charitable Fund, 2010
- Aaron & Jean Martin Fund, 1994
- Amy & Patrick Conrad Family Fund, 2010
- Anne & Gus Teipel Charitable Legacy Fund, 2013
- Ann S. & Steven B. Hutton Fund, 2017
- Anne Stroud Hannon Charitable Fund, 1998
- Barney Harahan Memorial Foundation, 2002
- Barrie Stavis Foundation, 2002
- Baxter Family Foundation, 2014
- Baylus & Deborah Francis Charitable Fund, 2002
- Beccaria Charitable Fund, 2006
- Believe, Play & Have Fun Foundation, 2015
- Bradley Hughes Foundation, 2009
- Bagel Family Foundation, 1998
- Capacity for Change Fund, 2008
- Carl & Sylvia Landis Foundation, 2012
- Caroline Maneing Bolton Legacy Fund, 2002
- Chain of Love Foundation for Turner Syndrome, 2004
- Champlain Social Ministry Foundation, 1999
- Chase Your Dream Foundation, 2007
- ChexCo Fund for Teacher Support, in Memory of Taylor Patterson Crane, 2007
- Clay-Mir Charitable Foundation, 2000
- Conor T. Schmidt Foundation, 2001
- Daley Family Foundation, 2015
- Daryl E. & Martha J. Thomas Foundation, 2002
- DelBattelise Foundation, 2010
- DI & Dallas Kraf Foundation, 1999
- Donors Advised 56%
- Di & Dallas Krapf Foundation, 1999
- DeBaptiste Foundation, 2010
- Daryl E. & Martha J. Thomas Foundation, 2002
- Davidson Family Foundation, 2008
- Dani & Dallas Krapf Foundation, 1999
- Dan & Cindi Krapf Foundation, 2000
- Dave & Dallas Krapf Foundation, 2009
- Dave & Viaan Krapf Foundation, 2014

**CCCF FAMILY OF AFFILIATED FUNDS % OF ASSETS, 2017**
- 10%
- 20%
- 30%
- 40%
- 50%
- 60%
- 70%
- 80%
- 90%
- 100%
FIELD OF INTEREST FUNDS

Adolescent Awareness Foundation, 2012
Chester County Charitable Fund (The Color Run Fund), 2017
Coatesville Community Health Foundation, 1999
Friends of Chester County Seniors Fund, 2010
Giving Circle-Friends of Elza, 2017
Giving Circle-Chesco Bar Young Lawyers Division, 2017
Imprints Grantmaking Endowment Fund, 2009

FISCAL AGENT-INTERIM FUNDS

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

NONPROFIT ENDOWMENT FUNDS

ARC of Chester County Endowment Fund, 2000
Association for the Colonial Theater Endowment Fund, 2016
Bishop Shanahan High School Endowment Fund, 2002
Bournelyf Special Camp Endowment Fund, 2005
Canine Partners for Life Endowment Fund, 1999
Chester County Art Association Endowment Fund, 1999
Chester County Council Boy Scouts of America Endowment Fund, 2013
Chester County Friends for Women and Girls Grants Endowment, 2001

Chester County Fund for Women and Girls Operating Endowment, 2001
Chester County Futures Endowment Fund, 1999
Chester County Library Endowment Fund, 1999
Chester County S.P.C.A. Endowment Fund, 2005
The Clinic Endowment Fund, 2007
Citizen Advocacy of Chester County Endowment Fund, 2016
Coatesville Community Education Foundation Endowment, 2009
Community Coalition Quasi-Endowed Fund, 1999
CVM Edgar R. Lawrence, DDS Dental Endowment Fund, 1999
CVM Gordon B. Hattersley, Jr. Endowment Fund, 1999
Daemion Counseling Center Endowment Fund, 2004
Devereux Foundation Endowment Fund, 2008
Domestic Violence Center of Chester County Endowment Fund, 2007
Easttown Library Foundation Endowment Fund, 2011
Family Service of Chester County Endowment Fund, 2008
French & Pickering Creeks Conservation Trust Endowment Fund, 2013
Friends of Anson B. Nixon Park Endowment Fund, 1999
Good Works Endowment Fund, 2002
Greater West Chester Rotary Foundation, 2013
Green Valley Watershed Association Endowment Fund, 2014
Habitat for Humanity of Chester County Endowment Fund, 2002
The Hickman Endowment Fund, 2004
Home & Farm Antique Association Restricted Endowment Fund, 2000
Home and Farm Antique Association Unrestricted Endowment Fund, 2000
Interfaith Housing Assistance Corporation of Chester County Endowment Fund, 2014
Jenner’s Pond Resident Charitable Endowment Fund, 2001
John Rock Memorial Foundation, 2004
Kennett Area Senior Center Endowment Fund, 2013
Kennett Symphony of Chester County Endowment Fund, 2006
Kerr Memorial Park Endowment Fund, 2010
Kiwanis Club of Phoenixville Endowment Fund, 2001
La Comunidad Hispana Honorary Endowed Fund, 2013
The Land Conservancy for Southern Chester County Endowment Fund, 2014
The Land Conservancy for Southern Chester County Endowment Fund, 2014
Lions Club of Kennett Square Endowment Fund, 2001
Longwood Rotary Club Scott Thompson Education Award, 2008
Lundale Farm Endowment Fund, 2013
Mayor Clifford E. DeBaptiste Educational Endowment for WCU, 1998
Mill at Anselma Preservation and Educational Trust Foundation, 2003
Oxford Educational Foundation Endowment Fund, 2017

Parksburg Free Library Endowment Fund, 1996
Paul Hasselplug Educational Fund of the Rotary, 1999
Pennsylvania Home of the Sparrow Endowment Fund, 2006
Phoenixville Community Education Foundation Endowment Fund, 2006
Phoenixville Public Library Endowment Fund, 1999
Planned Parenthood of SE PA Endowment Fund, 1995
PrIMITIVE Hail Endowment Fund, 1996
Priority One Foundation Endowment Fund, 2004
Quest Therapeutic Services Endowment Fund, 2011
S.A.V.E. Endowment Fund, 2010
Safe Harbor of Chester County Endowment Fund, 2016
Stroud Water Research Endowment Fund, 1997
Thorncroft Endowment Fund, 2010
Thomdale Rotary Jay Edge Community Service Award, 2009
United Way of Chester County Endowment Fund, 1998
United Way of Southern Chester County Endowment Fund, 2004
Volunteer English Program Endowment Fund, 2015
West Chester Downtown Foundation Grantmaking Endowment, 2014
West Chester Downtown Foundation Operating Endowment Fund, 2004
West Chester Downtown Foundation Up On The Roof fundraisers, 2013
West Chester Friends School Endowment Fund, 2011
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
Women’s Club of Downingtown Endowment Fund, 2003
YMCA of Greater Brandywine Endowment Fund, 1999
YMCA Kennett Area Educational Assistance Stipend Fund, 2017

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 Cranton Scholarship Fund, 2011
CECeP Marc P. Riddell Memorial Scholarship Fund, 2010
Charles A. Melton Scholarship Fund, 1999

Reading Family Foundation, 2014
Schwartz Family Foundation, 2001
Shoabak Family Foundation, 1998
Spurlino Family Foundation, 2006
Charles R. White Scholarship Fund, 1999
Coach Millard Robinson Memorial Foundation, 2001
Constance & Michael Briga 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, II 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
Karrin 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. MacEline 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, 2009
Stanley’s Dream Scholarship Fund, 2010
Susan DeCecco Scholarship Fund, 1999
Sweet Jane’s Wish Foundation, 2012
W. Thomas Musser Memorial Charitable Fund, 2017
West Chester Henderson Class of 1953 Scholarship Fund, 2008
West Chester Vietnam Memorial Scholarship Fund, 2016
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

“IF YOU WANT TO LIFT YOURSELF UP, LIFT UP SOMEONE ELSE.”
-Booker T. Washington
When tragedy struck, the Ericson Family found hope. They made up their minds to pass this hope on to others, even after so much had been taken away from them.

Stephen Chandler Ericson’s Dad, Joseph Ericson, Jr., could never forget that fateful day. “On September 14, 1984, I walked over the hill towards the sounds of cheering, umbrella in hand. As the soccer field came into view, I saw that Stephen had the ball. No one but the goalie stood in front of him as Stephen raced towards the net. Stephen grinned from ear to ear.” Joseph remembered, “I knew he was thinking about scoring the goal he had promised our family at breakfast that morning. Golden hair flying, a twinkle in his clear blue eyes, Stephen ran.”

“Suddenly a bolt of lightning emerged, appearing simultaneously with a large crack of thunder. There was no storm. Only a flash. Fans were thrown from the metal bleachers, players lifted off their feet, the referee knocked over. Stephen was not only struck by the lightning–he was surrounded by it. As people recovered, they realized that Stephen had been severely harmed by the lightning strike.”

For five days Stephen’s heart continued to beat, until 6:03 p.m. on September 19, 1984.

Stephen Chandler Ericson was loved and admired by many throughout his short life. He found the bright side to any situation.

Stephen’s Mother remembers:

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Stephen’s Mother remembers:

“The 2017 scholarship was awarded to Christopher Sanchez of Henderson High School. Christopher attends Bloomsburg University, majoring in exercise science. Christopher is grateful, “I try to live up to the ‘one life makes a difference’ motto by leaving a lasting impression on the people I meet and the places I’ve been, the way Stephen did.”

Cynthia attributes the Ericson Scholarship’s success to her parents. “We are the stewards of our parents,” she said following her father’s passing in 2014. “Mother is the heartbeat behind everything.”

Now that the Ericson Scholarship is part of the Community Foundation family, Laura and Cynthia have more time to do what they truly enjoy: encouraging community fellowship and engaging in charitable acts in Stephen’s name.

Like Stephen with the little girl at the mall, the Ericson family took a difficult situation and found the positive within it. They witnessed how Stephen’s life, although short, made an incredible difference on those around him. And now, every year, they give others the opportunity to do the same. Because, in the end, “one life does make a difference,” now and forever.

Scholarship Awardees Since Inception:

West Chester Christian School Scholars: 1985-2012

- Ruthann Smith – Edward Wendorf – Christopher Jenkins – KaraAnn Marinelli – Matthias Murphy – Rebecca Albright – Micah Murphy
- Olivi Grothaus-Blackstone – Heather Sadik

Henderson High School Scholars: 2012-2017

- Caitlyn Stratman – Maggie Eberts – Noah Sneddon – Samantha Shupe – Abigail Kosic – Christopher Sanchez

“One life makes a difference”
Bill was never one for pity nor tears. Yet he was highly emotional and passionate about his family, his community, and his work. He cared so deeply, about so much. As his longtime friend Skip Brion explains, “Bill just wanted everyone to be their best.”

Mary adds, “Bill would do anything for anybody. So many people came to him for advice: friends and family with difficulties; people trying to get into politics; churches such as his Lebanese church in Philadelphia or the local Catholic churches...they would always come to Bill for help. Bill took great pleasure in helping others and doing what he could. Always. For as long as I have known him.”

How did this arise? Maybe it was his upbringing. William Salem Latoff was born in Coatesville in 1948 and raised in Downingtown. He was extremely proud of his Lebanese ancestry. Bill adored his father, who had a very bad accident when he was young. Bill’s father had an incredible ability to greet every single person by name when walking down the street. Furthermore, the Latoff home had an open door, and Bill’s mother had a generous heart. People knew they were welcome to just drop by and stop in, and they did.

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Mary was instantly charmed by Bill. She lights up, explaining, “What attracted me to Bill? It wasn’t just one thing. It was the whole package. Bill was kind, generous, outgoing and loving...and a true gentleman. Our long term friendship blossomed into enduring love.”

After starting an accounting firm and consulting firm, Bill went on to invest in various businesses and banks. He also invested in commercial real estate and high-end auto dealerships—Mercedes, Land Rover, Jaguar. Over the years, Bill became President/Chairman of Brandywine Automotive Group, and then Chairman/CEO of DNB Financial Corporation.

Amidst business responsibilities, Bill and Mary traveled the world together: Italy and France were favorites. Banking functions with the American Bankers Association Public Affairs Committee and the Pennsylvania Bankers Association took them throughout the U.S.

Locally, Mary and Bill were always attending a myriad of charity events, political forums, fundraising functions and receptions. Bill’s community leadership was evident in the positions he held as Board Chair of the Chester County Industrial Development Authority, Chester County Library Trust, and Chester County Historical Society. He also served as a Board member of the Chester County Economic Development Council, the Chester County Chamber of Business & Industry, and the Federal Reserve Bank of Philadelphia Nominating Committee.

Bill was honored by the Chester County Council Boy Scouts of America, the Chester County Historical Society, and the Foundation for Catholic Education for his efforts on their behalf. Bill was also a devoted supporter of St. Maron’s, a Maronite Catholic Church in South Philadelphia. St. Maron’s has served men and women who emigrated to the U.S. from Lebanon, as well as generations of their descendants, for over 125 years since 1887.

After Bill passed away in 2016, Mary, along with friends and colleagues, began to meet to discern the best way to commemorate his life. “We knew we wanted to create a foundation to carry on Bill’s legacy,” explains Bill Hieb, CEO of DNB First.

“We considered incorporating a private foundation,” notes Skip Brion Esq. of Buckley Brion McGuire & Morris. “Then at one of our meetings, Mike DeHaven, a CPA, asked if we had thought about the community foundation option. We had heard of the community foundation, but didn’t have much detail. We knew that Mike had recently joined the Board of Directors of our local community foundation, but other than that we hadn’t had a lot of interaction with them.”

Mike explains, “It seemed like a natural fit to me. Especially when we realized that we were 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 Mike. “I asked the Community Foundation to send some basic materials for the committee to review. Then a few weeks later, Karen Simmons and Beth Harper Briglia of the Community Foundation joined our meeting. Actually, it was pretty easy. Karen and Beth made a brief presentation on the pros and cons of the Community Foundation, and then asked us about our goals and concerns. Our committee asked a lot of good questions, and they gave a lot of good answers.”

Bill Hieb notes, “I am impressed with the community foundation’s turn-key solution.” There are standard fund agreements, a detailed financial reporting package, administrative assistance, and systems in place. There is also customization, based on our specific needs and circumstances. All we had to do was say ‘yes’ and we could begin immediately. The turn-key solution allows us to focus on the fundraising and grantmaking.”

On the investment side, Controller Bob Ferguson explains, “DNB First has been one of our Gold Medallion Investment Partners for a few years now. This means that DNB First annually passes our due diligence review handling the investments of fund advisors who choose DNB First. It seems most fitting that DNB First handles the investment of this fund; something Bill Latoff would definitely want.”

**WILLIAM S. LATOFF CHARITABLE FOUNDATION, est. 2016**

**When a community icon with a huge heart and an immense fighting spirit loses against cancer, what’s to be done?**

“On one hand, I just wanted to curl up and cry. But I knew that Bill would be so disappointed if I did that,” reveals Mary Latoff. “During his fight with cancer, on the rare occasions when I did tear up, he’d look at me and say, ‘Get it together, Mary, You Can Do This.’ I needed to be strong for him. I wanted to make him proud.”

Mary was instantly charmed by Bill. She lights up, explaining, “What attracted me to Bill? It wasn’t just one thing. It was the whole package. Bill was kind, generous, outgoing and loving...and a true gentleman. Our long term friendship blossomed into enduring love.”

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On the fundraising side, the Committee obtained pledges from a group of individuals who care deeply about Bill Latoff, his accomplishments, and his legacy; people who were loyal to Bill and wanted to commemorate him. “It was amazing,” notes VP Beth Harper Briglia. “I’ve never seen a fundraising fund grow so quickly. From $0 to Six figures in just a couple of months. And more pledges coming in. The outpouring of support has been wonderfully generous, a testament to Bill Latoff’s popularity and his drive to help others.”

On the grantmaking side, the Committee intends to gather with Mary to make annual grants to causes that Bill cared about:

- Education
- Social & Human Services
- Community & Civic Engagement

Mary’s first grant was obvious to her: a significant gift to Chester County Hospital Abramson Cancer Center. “This was an easy decision, but a tough one at the same time. I wanted to present the check Dr. Dennis Berman, head of the Cancer Center. Dr. Berman’s care, concern and compassion for Bill and me was unwavering during those five months of treatment.”

“Being back in the Cancer Center and walking past the station where Bill often received his treatments was extremely difficult. Memories came flooding back. Sadly, the demand for cancer treatment has gotten greater. Yet gratefully, the Chester County Hospital and the Cancer Center enable patients to receive excellent care locally, without having to travel long distances.”

Working with Community Foundation staff, Mary is learning more about Chester County nonprofits. “I know a lot already, as I’ve been involved in this community for many years. Yet at the same time, the Community Foundation helps me discover organizations that I was not familiar with. CCCF staff accompany me on site visits to various nonprofits, enabling me to discern more fully what is important to me. I’m rolling up my sleeves and volunteering in some new places, meeting new people. It’s been fun, discovering new opportunities in my own backyard. There are some real hidden gems that do incredible work for the community.”

The grants to charitable nonprofits, combined with hands-on volunteerism, are a strong testament to Bill. The Community Foundation is honored to help commemorate Bill Latoff’s legacy, now and forever.

FOUNDED DONORS

These friends of Bill have made contributions and pledges to create the William S. Latoff Charitable Foundation. Additional gifts are welcome. We invite you to join us.

Ambassador Financial Group
Aqua Pennsylvania
Ardmore Banking Advisors
Glenda & Skip Brion
Buckley, Brion, McGuire & Morris
Chester County Economic Development Council
Chester County Industrial Development Authority
Communications Test Design Inc.
Kim & Mike DeHaven
DellaVecchia, Reilly, Smith & Boyd Funeral Home
Kathleen Demeter
Linda & Barry Devine
DNB First
Marcy & Rob Fenza
Anne & Jim Gagliano
Gawthrop Greenwood PC
Mary & Gerry Griesser
Diane & Bill Hieb
Innovative Compensation & Benefits Concepts
Mt & Curtis Joyner
Marie & Jim Koegel
Lamb McErlane, PC
Land Rover West Chester
Mary Demeter Latoff
Mark McCollum
Claudia & Chris McGill
Marion & Frank Monterosso
Phyllis & David Moser
Pancoast & Clifford
Peter R. Johnson & Company
June & Chuck Piola
Suzanne & Joe Rubino
Lolly & Jerry Sopp
Kathy & Joe Spada
Stradley Ronon Stevens & Young
Talluto’s Authentic Italian Food
Joanne & Tom Fillippo
Madeline & Jim Thornton
Chris & Rick Weber

LATOFF FUND SUGGESTED DONATION LEVELS

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<th>Level</th>
<th>Amount</th>
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<tr>
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</tr>
<tr>
<td>Suede Loafers Level</td>
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</tr>
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</table>

To contribute, send a check made payable to the Latoff Charitable Foundation, CCCF, 28 W. Market St., West Chester PA 19382 or donate securely online at www.chescocf.org search Latoff. Thank you.
Legacy Funds: What Legacy Will You Leave?

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 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. For endowed funds, we are allowed up to a 5% grant payout for perpetuity, to assure that grant funds are always available to help nonprofits.

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 Foundation’s historic 1833 headquarters.
- Operating Endowment gifts allow the Foundation to focus on its core mission, growing legacy philanthropy throughout the region.

**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.

**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.

**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 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 or Beth Harper Briggs, Vice President (610) 696-8845. Meetings are confidential.

**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.

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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 a member of our Ben Franklin Legacy Society.

Make your intentions public, inspire others, and help build a strong, vibrant philanthropic community. To join the Society, simply advise the Foundation of your intent. You can give to any existing fund, or create one of your own.

LEGACY SOCIETY MEMBERS

Sue M. Barber*
Louis J. Beccaria, Ph.D.
Henry S. Belber, II*
Elise Bodnar*
Elizabeth Boze*
Beth & Michael Briglia
Lucille & Robert Bugel
Constance Carter
Patricia C. & John Celsi, Jr.
Kimberly C. Collier*
Priscilla & Robert S. Crowder
Kimberly & Michael DeHaven
Margaret S. DeVinney*
Jane & Frank Dilley
Olga Dilido*
Eugene DiOrio
Patricia Dixon*
Russell Duane, II*
Winfred “Nicky” Ellis*
Anne & William Eison, Jr.*
Wiggie & John Featherman
Ronald Fletcher
Deborah Francis
Harold Freeman
Robin & David Frees
Francis T. Herron*
Josiah H. Hieberd*
Richard J. Hutton*
Richard A. Kurnisch, Sr.
El Kallet*
Sylvia & Carl Landis
Ilda Mae Large*
Zelinda LeBeautetier*
Jack Loker*
Bronwyn L. Martin, Ph.D., MBA,
CFP, CFP, CMC, ChFC, AEP (2)
Frederic I. Malmgren, Jr.
Matthew 25:35 Fund
Meghan Melehy & Jason Alexander
Mary Ann & Raymond Moskowicz
Joseph N. Pew
Plymouth Charitable Fund
John V. Postles, Jr.*
Karen & Robert Rigg
L. Paul Saxer
Louis Schorn Smith, CPA, CMA, MBA
Cecilia C. Schramm*
Leslie B. Schramm*
Karen A. Simmons
Jean & Richard Smolens
Barrie Stavis*
Barbara Sunday
Anne* & Gustave Teipelke
Craig Lincoln Tucker
Joanne Huntington Tunnell*
Kenneth Tunnell*
Christopher Lockwood Vaughan
Anonymous Estate (8)*
Anonymous Estate Request to
benefit Kennett High School Scholarship Fund*
Anonymous of Bryn Mawer
Anonymous of Chester Springs (4)
Anonymous of Cheyney (2)
Anonymous of Coatesville (4)
Anonymous of Devon
Anonymous of Downingtown (5)
Anonymous of Exton (2)
Anonymous of Glenmoore
Anonymous of Hilton Head, SC
Anonymous of Jenkintown (4)
Anonymous of Kennett Square (11)
Anonymous of Kimberton (2)
Anonymous of Malvern
Anonymous of Media
Anonymous of New York City, NY
Anonymous of Paoli (5)
Anonymous of Parkesburg
Anonymous of Phoenixville (8)
Anonymous of Princeton, NJ
Anonymous of Spring City
Anonymous of West Chester (26)
Anonymous of West Grove (5)
Anonymous of Wilmington
Anonymous of Wynnewood
*cum stellorum
GOLD SPONSOR
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The Merz Group
Pegasus Technologies
Phoenixville Federal Bank & Trust
The Rigg Darlington Group
Thompson, Siegel & Walmsley
Umbreit, Korengel & Associates
Wilmington Trust, an M&T Bank

SWEET CHARITY DESSERTS
Best Dessert - Professional Judges Vote:
General Warren Inne – Praline Pecan Cheesecake
Best Dessert - Popular Vote: (tie)
John Serock Catering - Chocolate Hazelnut Tortellini with Strawberry Cream Sauce
Carlino’s Specialty Foods - White Chocolate Amaretto Dacquoise
Most Creative: Milito’s Restaurant & Bar - The Funky Monkey
Cakes and Candies by Maryellen - Gâteries à la Guimauve (Marshmallow Treats!)
Delightful Desserts & Culinary Creations - Lemon Lavender Rice Pudding Parfait
Gemelli Artisanal Gelato & Dessert Café - Tiramisù Gelato Bites
New Street Catering - Chocolate Mint Fusion Shooter & Mudslide Pudding Shooter
Whitford Country Club – Strawberries & Cream Mousse Cups

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

GUEST SWEET PARTING GIFTS
Courtesy of Albert Lauber, Neuchatel Chocolates

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

THANKS TO OUR SWEET VOLUNTEERS
Victoria Gardens Auxiliary
West Chester University Abbe Society
West Chester University Friar Society & all our former Community Foundation interns who return to lend a hand
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 2017, contributions totaled $4.1 million from 2,442 donors. This is a 30% increase from 2016.

DONORS 7/1 TO 6/30
Due to space limitations, donations over $250 are included in this listing. All donations are vital to us.
“REAL GENEROSITY TOWARDS THE FUTURE LIES IN GIVING ALL TO THE PRESENT”
- Albert Camus
Portfolio Objectives
The Community Foundation is committed to prudent investment management strategies and fiscal policies that it believes will lead to the long-term growth of endowment fund principal and meet the Community Foundation’s distribution policy objectives. The Community Foundation seeks to preserve and enhance the value of the portfolio’s assets by providing long-term growth greater than the rate of inflation and fee costs, while recognizing that prudent risks must be taken.

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

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

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

Policy Portfolio Structure and Ranges

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

Chester County Community Foundation
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:

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

All get credit for the perfect charitable solution.

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

We help you find the best charitable solutions...
Individuals increasingly expect their professional advisors to assist them with strategic philanthropy as part of overall planning.

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

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

It’s a winning partnership. The Community Foundation helps advisors and their clients customize philanthropy solutions for their specific situations. Whether it is through a gift of appreciated securities or real estate, a non-cash asset, a life insurance policy, or bequest, there are many ways the Community Foundation helps professional advisors find solutions, to help fulfill dreams of giving to the community.
### CHES O T E R C O U N T Y COMMUNITY FOUNDATION

**STATEMENTS OF FINANCIAL POSITION** as of June 30  
*Audited by Umbreit Korengel & Associates*

#### USES OF FUNDS

- **Grants & Programs**: 91%
- **Management & Administration**: 7%
- **Fundraising**: 2%

#### ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash &amp; cash equivalents</td>
<td>$4,655,718</td>
<td>$2,357,326</td>
</tr>
<tr>
<td>Accounts &amp; other receivables</td>
<td>49,718</td>
<td>20,000</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>23,277</td>
<td>14,206</td>
</tr>
<tr>
<td>Certificates of deposit</td>
<td>1,133,593</td>
<td>1,118,416</td>
</tr>
<tr>
<td>Marketable securities</td>
<td>46,278,064</td>
<td>42,496,538</td>
</tr>
<tr>
<td>Note receivable</td>
<td>264,119</td>
<td>264,119</td>
</tr>
<tr>
<td><strong>Total Current Assets</strong></td>
<td>$52,404,489</td>
<td>$46,270,605</td>
</tr>
<tr>
<td>Property &amp; equipment, net</td>
<td>381,825</td>
<td>407,583</td>
</tr>
<tr>
<td>Unconditional promises to give, net</td>
<td>26,911</td>
<td>18,055</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$52,813,225</td>
<td>$46,696,243</td>
</tr>
</tbody>
</table>

#### Liabilities

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable &amp; accrued expenses</td>
<td>$67,112</td>
<td>$71,676</td>
</tr>
<tr>
<td>Annuity payable</td>
<td>200,505</td>
<td>265,644</td>
</tr>
<tr>
<td>Not-for-profit endowments</td>
<td>5,221,379</td>
<td>4,669,986</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td>$5,488,996</td>
<td>$5,007,306</td>
</tr>
</tbody>
</table>

#### Net Assets

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>$47,253,058</td>
<td>$41,650,882</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>71,171</td>
<td>38,055</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td>$47,324,229</td>
<td>$41,688,937</td>
</tr>
</tbody>
</table>

#### Total Liabilities and Net Assets

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td>$52,813,225</td>
<td>$46,696,243</td>
</tr>
</tbody>
</table>

---

"I wondered why somebody didn’t do something. Then I realized, I am somebody."

- Unknown

To obtain a copy of the audit &/or IRS 990, contact the Foundation.  
(610) 696-8211 or info@chescocf.org.
The Community Foundation Board acknowledges the dedicated service of Dave Elderkin, whose 6 years on Board coordinated Lincoln Building repairs and renovations; and steered the Hibberd estate transition. Dave’s hands-on volunteerism continues to be appreciated and admired.

The Community Foundation Board commemorates Matthew Kelly, who passed away on June 1, 2017. Matt served as a Board member for 6 years, and he expertly Chaired the Investment Committee during his tenure.

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.

Committees

The Community Foundation Board recognizes the importance of community engagement. These advisors consistently help strengthen legacy philanthropy by providing information, expertise and introductions.

Estate Planning Attorneys
Denise M. Antonelli, Esq.
Joseph A. Bellingheri, Esq.
P. Kristen Bennett, Esq.
Amy M. Biggs, Esq.
A. Duie Latta, Esq.

Wealth/Investment Advisors
Jennifer L. Byrne, CFA
Michelle Briglia, CFPT®, ChFC®, AEP®
Richard C. Clark, CFP®, ChFC®, AEP®
Michael F. Connelly, CFP®, AEP®

Accountants
Kathy Dean-Bradley, CPA
Karol A. Clark
Michael DeHaven, CPA
Charles P. McGivney, CPA
Douglas Pacitti, CPA
Louise Schorn Smith, CPA, CMA, MBA

Governance/Nominating Committee
Anthony Morris, Esq., Chair
Joanne Peskoff Bear, Esq.
Meg Freeman
William Gallagher, Esq.
Kevin Holleran, Esq.
Pamela Leland, Ph.D.
Stacey Wills McConnell, Esq.
Eva L. Verplanck, Ph.D.

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Douglas Pacitti, CPA
Louise Schorn Smith, CPA, CMA, MBA

Grants Policy Committee
Ann Spencer Hutton, Chair
Carol A. Clark
Louis J. Beccaria, Ph.D.
Meg Freeman
Ruth E. Kraml-Carl
Mary DeMetor Latoff
Michael G. Louis, Esq.
Garandina Martin
Joanne Peskoff Bear, Esq.
Eva L. Verplanck, Ph.D.

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Partner, McMichael, Heiney & Sebastian
Vice Chair
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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

EXECUTIVE COMMITTEE
The Community Foundation Board acknowledges the dedicated service of Dave Elderkin, whose 6 years on Board, ended June 30, 2017. Dave Co-Chaired the Best Practices Task Force and the Fund Policies Revision Task Force; coordinated Lincoln Building repairs and renovations; and steered the Hibberd estate transition. Dave’s hands-on volunteerism continues to be appreciated and admired.

IN MEMORIAM
The Community Foundation Board commemorates Matthew Kelly, who passed away on June 1, 2017. Matt served as a Board member for 6 years, and he expertly Chaired the Investment Committee during his tenure with the Community Foundation.
Staff

Karen A. Simmons
President/CEO

Beth Harper Briglia, CAP®
Vice President, Philanthropy Services

Robert (Bob) Ferguson
Controller

Stephanie Stevens
Community Engagement Officer

Hailey Blessing
Marketing & Communications Officer

Kevin Baffa
Administrative Assistant & Scholarship Administrator

Thomas Carr, Business Affairs
Bryce Cleveland, Business Affairs
Samantha Helias, Advancement
Taylor McCallan, Advancement
Jonathan Schumacher, Advancement
West Chester University Interns

Thanks to our interns who have gone onto new positions:
Gigi Elashram, Samantha Jeune, Jacob Naseef,
Dwayne Robinson, Jose Santiago, Shaye Stuart, Himali Vyas

CONNECTING PEOPLE WHO CARE WITH CAUSES THAT MATTER, SO THEIR PHILANTHROPY MAKES A DIFFERENCE NOW AND FOREVER.