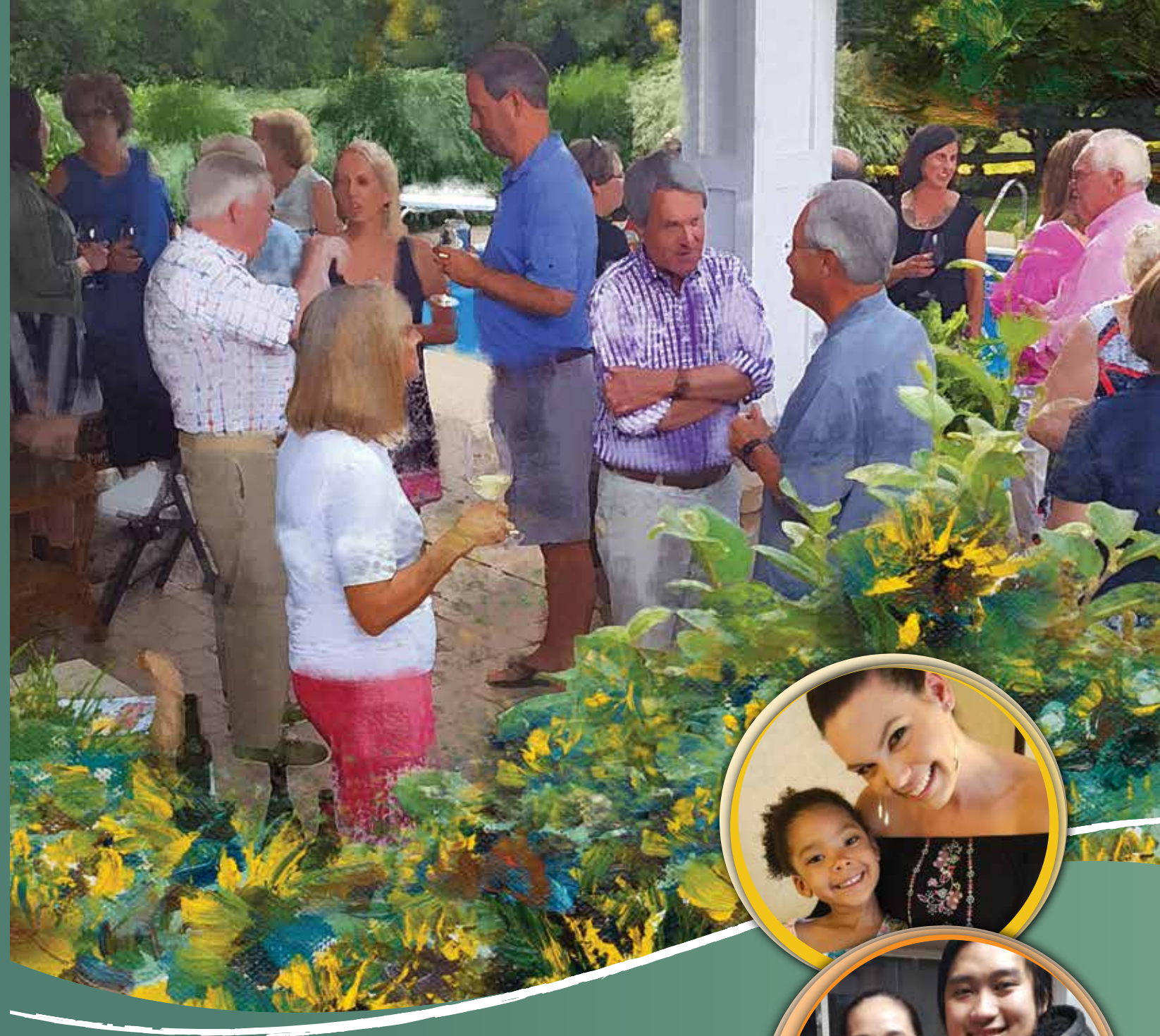


Chester County COMMUNITY FOUNDATION

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 | info@chescocf.org



Credits

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Front Cover: Board of Directors event at the Rigg home; Aliyah & Noelle; Thu & Hung-Lan & Inu

Inside Front Cover: Bailey's Farm Dairy

Page 2: Counting Kendall's donation to charity

2017 ANNUAL REPORT

Let your legacy inspire, now and forever.

Chester County
COMMUNITY FOUNDATION

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Connecting people who care with causes that matter, so 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

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.

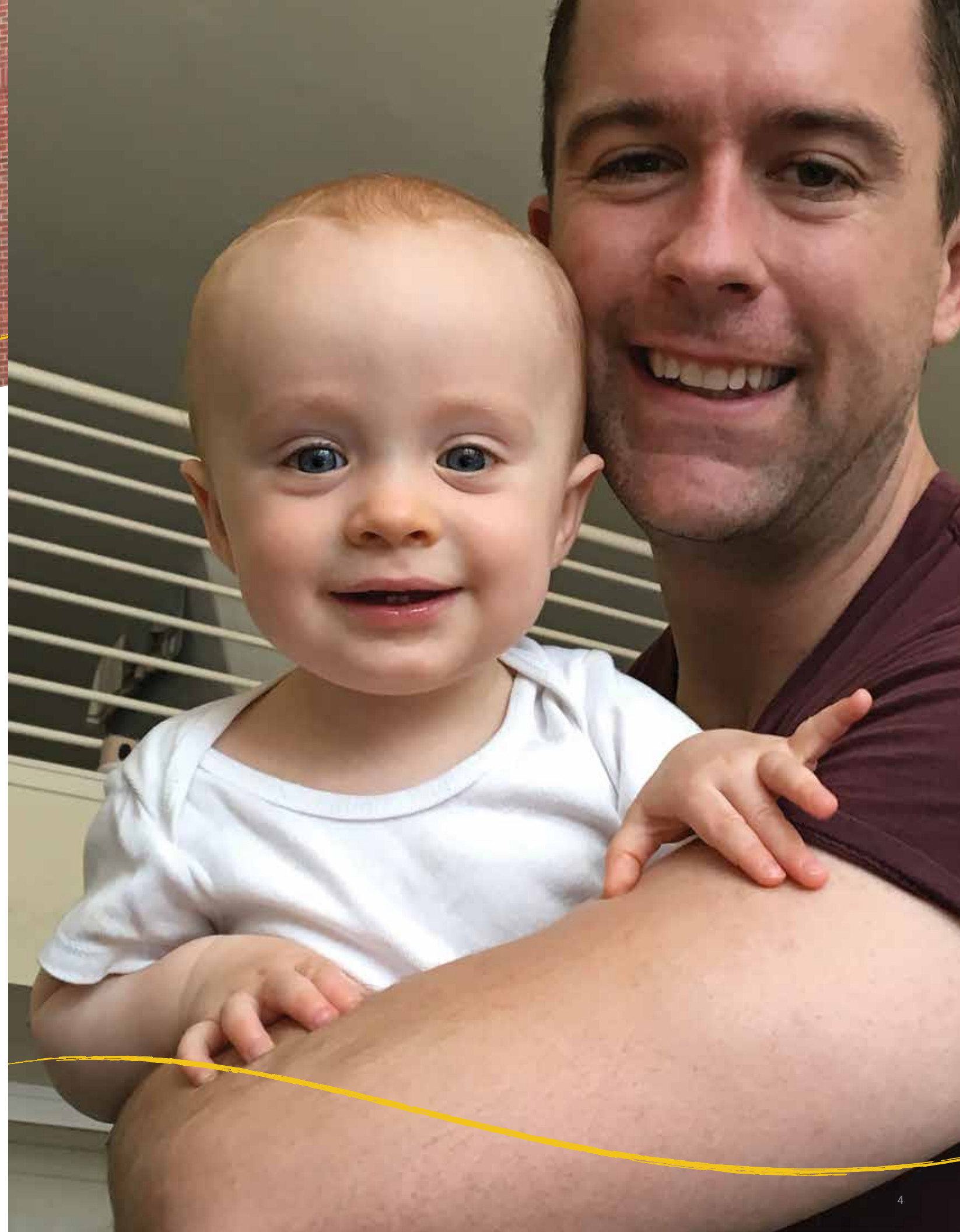
Philanthropy is a vitally important way for citizens to exemplify their priorities for a caring, civil society, and to provide programs and services that are customized locally.

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





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 FY2017, \$2.3 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 | Bee Positive Foundation | Carter CDC/Joseph & Sarah Carter Community Development Corp. | Children's Hospital of Philadelphia |
| Act in Faith of Greater West Chester | Bethel AME Church | Casa Guanajuato | Christ Community Church |
| Adult Care of Chester County | Bethesda Project | Catawba College | Christiana Care Health System |
| Aidan's Heart Foundation | Bishop Shanahan High School | Cathedral Church of Saint Paul | Citizen Advocacy of Chester County |
| Alianzas de Phoenixville | Blue White Scholarship Foundation | Charles A. Melton Art & Education Center | City Gate |
| ALS Hope Foundation | Boy Scouts of America, Chester County Council | Chemical Heritage Foundation | The Clinic |
| Alzheimer's Foundation of America | Brandywine Baptist Church | ChesPenn Health Services | Coatesville Center for Community Health |
| American Association for Cancer Research | Brandywine Conservancy | Chester County 2020 | Coatesville Community Education Foundation |
| American Cancer Society-East Central Division | Brandywine Health Foundation | Chester County Art Association | Coatesville Parents Music Club |
| Andrew L. Hicks Jr. Foundation | Brandywine Red Clay Alliance | Chester County Bar Foundation | Coatesville Youth Initiative |
| ARC of Chester County | Brandywine Valley SPCA | Chester County Food Bank | Coker College |
| Archmere Academy | Bridge Academy & Community Center | Chester County Fund for Women & Girls | Community Coalition |
| Art Partners Studio | Cabrini College | Chester County Futures | Community Volunteers in Medicine |
| Atlantic Salmon Federation | Cairn University | Chester County Hospital Foundation | Concordville Fire & Protective Association |
| Avondale Fire Company | Caln Elementary PTA | Chester County Library | Council on Foundations |
| Avondale Fire Company EMS Division | Calvary Chapel of Delaware County | Chester County Public Safety Training Foundation | County Corrections Gospel Mission |
| Barclay Friends | Calvary Fellowship Church | Chester County Women's Services | Crime Victims' Center of Chester County |
| Barn at Spring Brook Farm | Camp Dreamcatcher | Chester County's Children | CRU |
| Barnstone Arts for Kids | Camphill Special School | Children's Country Week Association | |



- | | | | |
|--|--|--|--|
| Daemion Counseling Center | Haiti Partners | Metro Lacrosse | |
| Daniel Foundation | Handi-Crafters | Michael's Way | |
| David's Drive 831 | Harvey Kaufman Memorial Scholarship Fund | Milford Middle School | |
| Daylesford Abbey | Haverford College | Mill at Anselma Preservation Educational Trust | |
| Decade to Doorways | Heifer International | Mom's House | |
| Delaware County Community College Educational Foundation | The Hickman | Mount Desert Island Hospital | |
| Delaware Riverkeeper Network | Hillsdale High School Alumni Association | Mount Desert Land & Garden Preserve | |
| Delaware Valley Science Fairs | Historic Kennett Square | Musicopia | |
| Diane Matthews Dance Studio | Honey Brook Community Library | Napa Valley College Foundation | |
| Dickinson College | Honey Brook Food Pantry | National Brain Tumor Society | |
| Diocese of Venice in Florida | Hope Springs Equestrian Therapy | Natural Lands Trust | |
| Domestic Violence Center of Chester County | House of His Creation | Neighborhood Hospice | |
| Downingtwn Area Senior Center | IHS Global | New Found Freedom Foundation | |
| Downingtwn Library | Immaculata University | New York City Relief | |
| Elizabethtown College | Interfaith Housing Assistance Corporation | New York Yacht Club Foundation | |
| Evergreen State College Foundation | Jenner's Pond | Nottingham County Park | |
| Fairview Evangelical Presbyterian Church | Jersey Surf | Open Hearth | |
| Faith in the Future Foundation | Jesuit Center at Wernersville | Open Land Conservancy | |
| Family Promise of Southern Chester County | JEVS Human Services | Otho Davis Scholarship Foundation | |
| Family Service of Chester County | Justice Rescue | Oxford Area Neighborhood Services Center | |
| Family Stations Radio | K9s For Warriors | Oxford Educational Foundation | |
| First Presbyterian Church | Kendal-Crosslands Communities | Oxford Senior Center | |
| Forgotten Cats | Kennett After-School Association-After the Bell | Paoli Fire Company | |
| Foundation at Great Valley | Kennett Area Community Services | Paoli Hospital Foundation | |
| Foundation for Learning in Tredyffrin/Easttown | Kennett Area Park Authority | Parkesburg Library | |
| Foundation for Lee County Public Schools | Kennett Area Senior Center | Parkesburg Point | |
| | Kennett Fire Company #1 | Partners in Outreach | |
| | Kennett Flash | Peacemaker Center | |
| | Kennett Food Cupboard c/o KACS | Peirce Middle School | |
| | Kennett High School | Penn State Brandywine | |
| | Kennett Library | Pennsylvania Home of the Sparrow | |
| | Kennett Symphony of Chester County | People's Pantry at Church Road | |
| | Kennett Underground Railroad Center | Petra Community Housing | |
| | Kimberton Waldorf School | Philabundance | |
| | Kutztown University Foundation | Philadelphia Ronald McDonald House | |
| | La Comunidad Hispana | Phoenixville Area Children's Learning Center | |
| | The Land Conservancy for Southern Chester County | Phoenixville Area High School | |
| | LGBT Equality Alliance | Phoenixville Area Middle School | |
| | Lifeline Family Center | Phoenixville Area School District | |
| | Lighthouse Youth Center | Phoenixville Community Education Foundation | |
| | Living Beyond Breast Cancer | Phoenixville Community Health Foundation | |
| | Living Breath Foundation | Phoenixville Jaycee Foundation | |
| | London Grove Friends Meeting | Phoenixville Women's Outreach - The House | |
| | Lord's Pantry of Downingtown | Planned Parenthood of SEPA | |
| | Lyme Disease Association of SE PA | Police Athletic League of Philadelphia | |
| | Magee Rehabilitation Hospital Foundation | | |
| | Maine Coast Heritage Trust | | |
| | Maternal & Child Health Consortium | | |

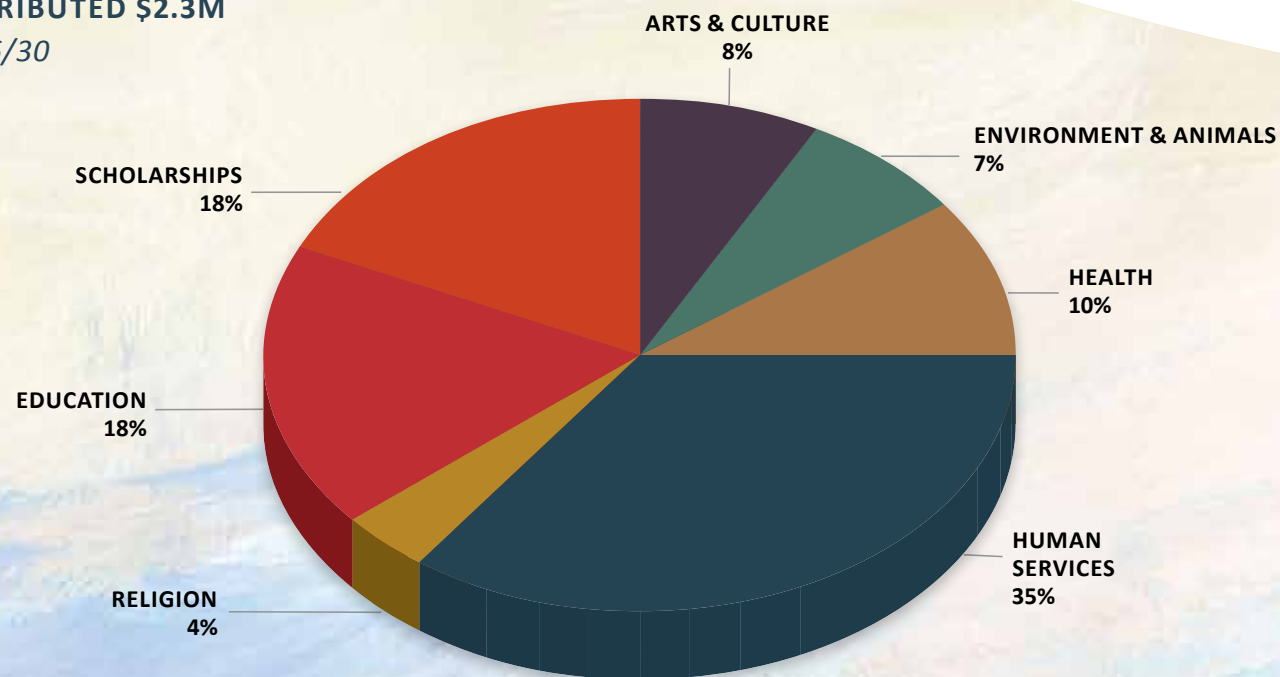


Temple University
 The New York Leadership Center
 Thomas Jefferson University
 Tick Tock Early Learning Center
 Tin Whistles Educational & Research Foundation
 Transition Dynamics Associates Inc.
 Tredyffrin & Easttown Care
 Tredyffrin Public Library
 Trustees of The University of Pennsylvania
 Unite for HER/Pink Invitational
 United Way of Chester County
 United Way of Southern Chester County
 U of PA Fels Institute of Government
 Upland Country Day School
 Uptown!Entertainment Alliance
 Villanova University
 Volunteer English Program
 West Chester Area Education Foundation
 West Chester Area Senior Center
 West Chester Branch NAACP #2292
 West Chester Dance Works
 West Chester Food Cupboard
 West Chester High School Alumni Association

West Chester Parks & Recreation
 West Chester Public Library
 West Chester University Foundation
 West Grove Fire Company
 Westtown Goshen Rotary Foundation
 Wetlands Institute
 Wharton Esherick Museum
 WHYY Channel 12 PBS TV
 Williamson Free School of Mechanical Trades
 Willistown Conservation Trust
 Willistown Friends Meeting- Educational Fund of the Trustees
 Wistar Institute
 Women's League for Minority Education
 Wounded Warrior Project
 YMCA Brandywine
 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



**CCCF GRANTS & SCHOLARSHIPS
 DISTRIBUTED \$2.3M
 7/1-6/30**



"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 earned his B.S. in accounting at the University of Dayton, Ohio in 1991. He joined Rainer & Company in 1994 and was made a shareholder in 2004. Mike serves as Chair of the firm's employee benefit plan division. In addition, he is directly responsible for servicing clients in various industries, including construction, manufacturing, real estate, transportation, hospitality, professional service firms, non-profit and government organizations. He is directly involved in developing tax planning strategies and the review of tax compliance.

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."



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



Door Opener Honorees

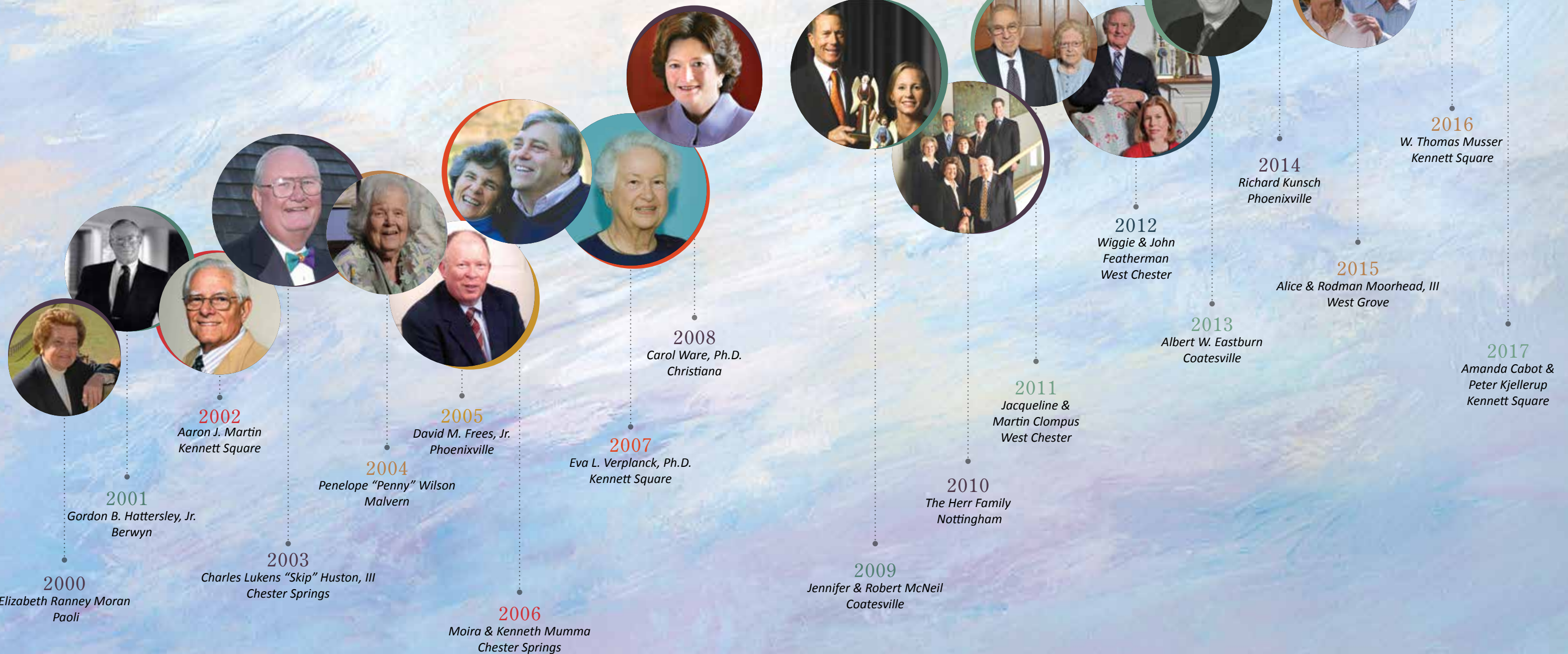
- 2004 Stephen McGann, CTFA, AEP
- 2005 L. Peter Temple, Esq.
- 2006 Michael B. Karwic, CFP, CRPC, AEP
- 2007 David M. Frees, III, Esq.
- 2008 John A. Featherman, III, Esq.
- 2009 Honorable Dr. Clifford DeBaptiste
- 2010 William J. Gallagher, Esq.
- 2011 Duke Schneider, Esq.
- 2012 Robb S. Frees, CIC
- 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

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 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.



Dr. Henry A. & Barbara M. Jordan Award

Significant, Longstanding, Comprehensive Philanthropic Achievements

AMANDA CABOT & PETER KJELLERUP

Boston-born Mandy Cabot was heading for a career in education. Denmark-born Peter Kjellerup was a gifted classical dressage trainer. When their paths converged, their worlds changed. Together, they have made our world a better place in countless ways. Their mottos:

- “Take a stand. Make a difference. Slay apathy.”
- “If you have something great to share, you share it.”

Mandy grew up in a family culture that taught “to whom much is given, much is expected.” Mandy explains, “My dad, grandfather, and great-grandfather were traditional businessmen, founding and in succession running the family business, Cabot Corporation, a specialty chemical manufacturer. In the Boston Brahmin tradition, my elders devoted their adult lives to making as much money as they could, only to turn around and give the lion’s share of it to charity before they died.” Neither Mandy nor any of her four siblings chose to go into the family business.

Mandy graduated from Harvard College with a Bachelor's degree in Anthropology, did a post-graduate year at Stanford University, and graduated from the University of Virginia with a Master's degree in Special Education. Yet she felt she was on the wrong path. Mandy took a break and went back to Massachusetts to find her footing and to sort out what she really wanted to do.

Peter Kjellerup was born in Odense, Denmark. Immersed in the country’s deep-rooted commitment to environmental sustainability, he studied agriculture at University. Yet it was the horses that really called to him. Peter traveled throughout Europe, a well-regarded dressage rider and gifted classical dressage trainer.

So how did they meet? Peter picks up the story from here: “Mandy’s mom co-founded Hamilton Farm in Massachusetts to breed and train dressage horses. She brought me in as a guest instructor. Mandy and I fell madly in love. It really was love at first sight.”

In 1983, Mandy and Peter started their equestrian business together at Five Star Farm in Unionville, importing, breeding and training competition dressage horses. Their model was to take diamonds in the rough, train them, compete them, and sell them. Their clients included members of the U.S. Equestrian team.

In addition to horses, Mandy and Peter imported hard-to-find training gear and equestrian apparel. On one of their many horse-buying trips to Denmark, Mandy glimpsed a pair of closed-back clogs in the window of a small shop in Peter's hometown: “I suddenly realized that clogs were the perfect barn shoe. Unlike riding boots, they're easy to get on and off, supportive, protective, and extraordinarily comfortable. We started stocking clogs in our tack shop. We also brought them to horse shows and sold them out of our station wagon. **We made up the name Dansko – literally translated as ‘Danish shoes’ – and incorporated in 1990.**”



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 hit by the proverbial bus, Dansko's future might be in jeopardy. "We needed to explore options to ensure the company's long-term financial and cultural future," notes Mandy. "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 mediation 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 2012, 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 COOE. 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."

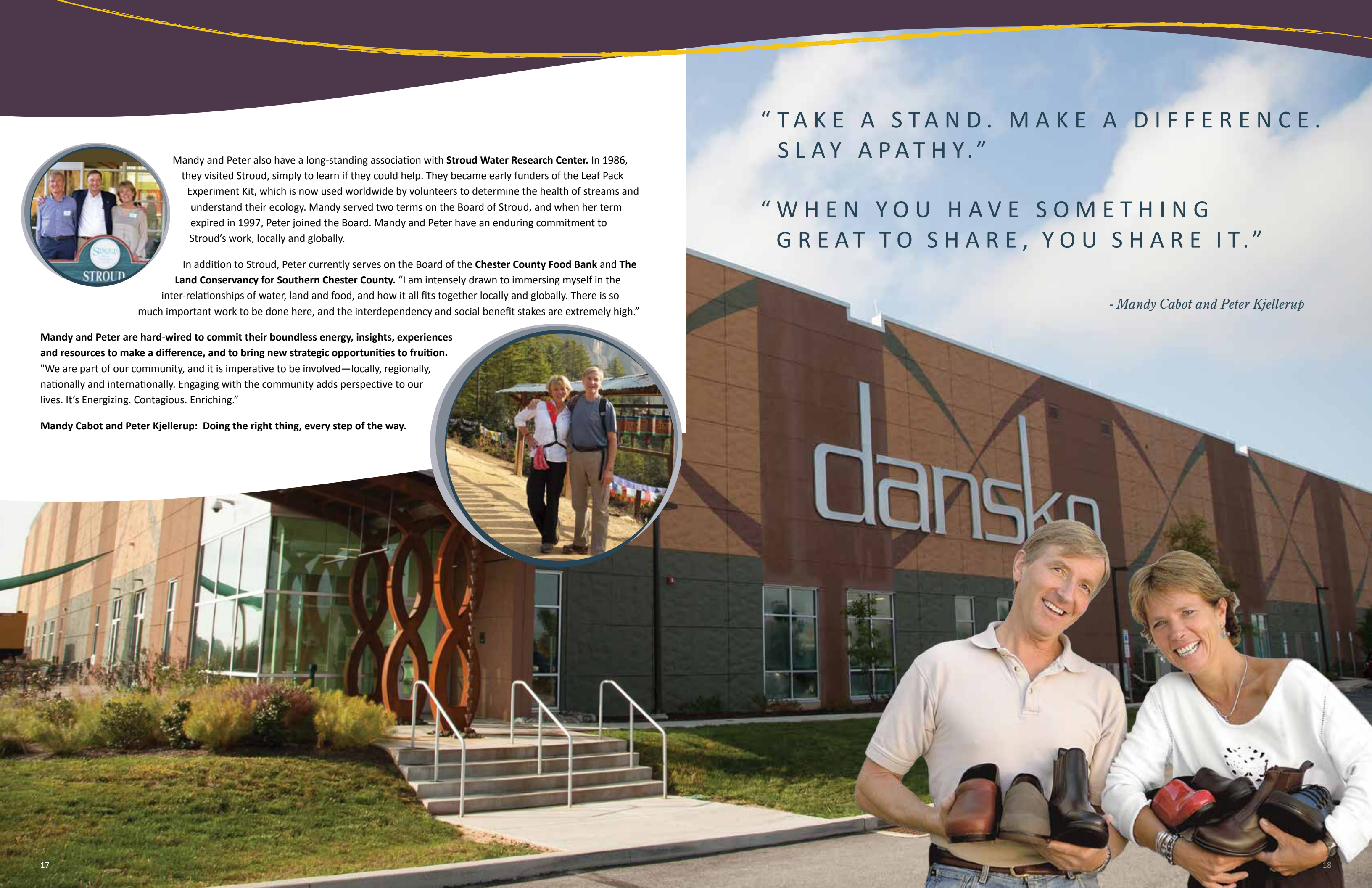
Mandy Cabot and Peter Kjellerup: Doing the right thing, every step of the way.



"TAKE A STAND. MAKE A DIFFERENCE. SLAY APATHY."

"WHEN YOU HAVE SOMETHING GREAT TO SHARE, YOU SHARE IT."

- Mandy Cabot and Peter Kjellerup



Funds



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.

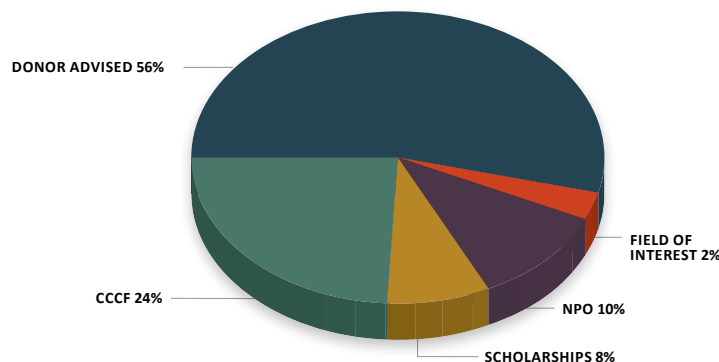
CCCF FUNDS

- 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 Delno 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 ChesCo Honoring Richard I.G. Jones, 2007
- CCCF Grantmaking Fund for ChesCo Environment, 2001
- CCCF Grantmaking Fund for ChesCo, 1998
- CCCF Hutton Grantmaking Fund for ChesCo, 2017**
- 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 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 Endowment, 2001, 2012
- CCCF Operating Fund, 1994
- CCCF Parkesburg Environmental Foundation, 1998
- CCCF Summer Fundraiser 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)
- 4Kids2C Charitable Fund, 2010
- Aaron & Jean Martin Fund, 1994
- Amy & Patrick Conrad Family Fund, 2010
- Anne & Gus Teipelke Charitable Legacy Fund, 2013
- Ann S. & Steven B. Hutton Fund, 2017**
- Anne Stroud Hannum Charitable Fund, 1998
- Barney Harahan Memorial Foundation, 2002
- Barrie Stavis Foundation, 2002
- Baxter Family Foundation, 2014
- Baylus & Deborah Francis Charitable Fund, 2002
- Beccaria Charitable Fund, 2006
- Believe, Play & Have Fun Foundation, 2015
- Bradley Hughes Foundation, 2009
- Bugel Family Foundation, 1998
- Capacity for Change Fund, 2008
- Carl & Sylvia Landis Foundation, 2012
- Caroline Manning Bolton Legacy Fund, 2002
- Chain of Love Foundation for Turner Syndrome, 2004
- Champlain Social Ministry Foundation, 1999
- Chase Your Dream Foundation, 2007
- ChesCo Fund for Teacher Support, in Memory of Taylor Patterson Crane, 2007
- Clay-Mir Charitable Foundation, 2000
- Connor T. Schmidt Foundation, 2001
- Daley Family Foundation, 2015
- Daryl E. & Martha J. Thomas Foundation, 2002
- DeBaptiste Foundation, 2010
- Di & Dallas Krapf Foundation, 1999

CCCF FAMILY OF AFFILIATED FUNDS % OF ASSETS, 2017



- Dianne & Dave Elderkin Charitable Fund, 2013
- Dick & Jane Kunsch Family Foundation, 2014
- Diederich Family Foundation, 2007
- Doe Run Charitable Fund, 2005
- Don Gregory Stout Memorial Outreach Endowed Fund, 2014
- Edward H. & Dorothy K. Dickol Foundation, 2006
- Elizabeth Bove Foundation, 2013
- Emily's Dash Foundation, 2012
- Eric Miller Memorial Charitable Fund, 2016
- Everett Frank Legacy Foundation, 2000
- Farnesi Family Foundation, 2000
- Featherman Family Foundation, 2006
- Francis J. Snyder Foundation, 2007
- Frees Family Foundation, 1998
- Ginger English Memorial Foundation, 2007
- Good Fight Foundation, 2005
- Hadley Fund, 2016
- Hailey Bear Memorial Fund, 2016
- Happy Romar Fund of Chester County, 2000
- Harry & Aggie Tyler Can-Do Foundation, 1999
- Heart in Hand Partnership Endowed Fund, 2000
- Helen & Paul Breitegam Charitable Fund, 2003
- Helen & Robert Whittaker Memorial Trailhead Park Foundation, 2011
- Hennigan Family Foundation, 2007
- Hockman Family Foundation, 2012
- Hollenbach Family Foundation, 2000
- Honorable Dr. Clifford DeBaptiste Church Foundation, 2014
- Hutton Family HeLP Fund, 2000
- I Scream for Elephants Charitable Fund, 2011
- Ilex Charitable Fund, 2012
- J. M. & Lois B. Herr Family Foundation, 1998
- Jack C. Griest Charitable Fund, 2013
- Jeffrey Robert Drobish Foundation, 2010
- Jeremy P. Wilson Foundation, 2010
- Jessie L. & Harold W. Freeman Foundation, 2011
- Jim Decker Compassion Ministry Charitable Fund, 2002
- Joan & William Walkup Family Foundation, 1999
- John & Heather Drobish Family Fund, 2010
- John Eirkson & Kathy Ryan Esq. Charitable Fund, 2009
- John H. Phillips III Memorial Fund for Horseshoe Scout Reservation, 2000
- Jordan Family Fund for Chester County, 1998

- K&M Foundation, 2003
- K9s4kids Charitable Fund, 2010
- Kathleen McBratnie Memorial Foundation, 2004
- Kelly Family Foundation, 2012
- Kennedy Marie Canzoneri Memorial Fund, 2016
- Kevin Holleran Charitable Fund, 1999
- Kim L. Ringler & Thomas A. Wurm Family Foundation, 2017**
- Koester Family Foundation, 2000
- Krapf Family Foundation, 1999
- The Lark Fund, 2012
- L.E.G. Up Charitable Foundation, 2007
- Lacy Charitable Fund, 2014
- Lamberth Family Foundation, 2016**
- Laudenslager Family Foundation, 2011
- Laura Meikle Koch Memorial Legacy Foundation, 2008
- Liddick Family Foundation, 2007
- Lockwood Family Foundation, 2007
- Loew Family Foundation, 2007
- M & M Foundation, 2001
- Manor Avenue Charitable Fund, 2014
- Margaret E. Coppedge Memorial Fund to Benefit Grimes AME Church, 2005
- Margaret S. DeVinney Foundation, 2011
- Marjorie L. & Arthur P. Miller, Jr. Charitable Fund, 1998
- Marvin & Shirley Porter Educational Foundation, 2009
- Matthew 18:20 Fund, 2012
- McGowan Family Charitable Fund, 2016**
- Mesothelioma and Asbestos Disease Society Charitable Fund, 2004
- Moretzsohn Family Foundation, 2000
- Mr. & Mrs. Robert P. Moran, Jr. Family Foundation, 2010
- Nannette & Dale Krapf Foundation, 1999
- Newlin Foundation, 2010
- Next Step Charitable Fund, 2014
- Nick Smiles on the Fine Arts Foundation, 2010
- Niles-Milner Fund for Student Travel, 2004
- Orchard Charitable Fund, 2001
- P.G. Thomas Charitable Legacy Foundation, 2009
- Patricia C. & John Celii, Jr. Foundation, 2007
- Pay It Forward Fund, 2014
- PFF Charitable Fund, 2000
- Pink House Foundation, 1998
- Put Your Money Where Your Mouth Is Foundation, 2009

Quigley Family Foundation, 2012
 RE/MAX Main Line Charitable Foundation, 2006
 Reading Family Foundation, 2014
 Rev. William J. Fischler Memorial Cursillo Foundation, 2007
 Richard & Carolyn Vermeil Foundation, 2010
 Richard & Lois Hodgson Charitable Fund, 1998
 Rigg Family Foundation, 2011
 RJ Hogga Foundation, 2014

Roberson/Rowley Foundation Honoring Bianca & Mykel, 2017

Robert & Jennifer McNeil Charitable Fund, 2002
 Robert M. Price Memorial Foundation, 2004
 Robert Olin Niles Memorial Foundation, 2010
 Robert Wiley Miller Memorial Foundation, 2000
 Romig Road Victory Run Foundation, 2008
 Ruch Family Foundation, 2011
 Samantha Lee Zajac Memorial Foundation, 2001
 Sarnacki Family Foundation, 2014
 Schwartz Family Foundation, 2001
 Shobaken Family Foundation, 1998
 Spurlino Family Foundation, 2006
 St. Ann Rose Charitable Fund, 2000
 Stamm Consultancy Charitable Fund, 2016
 Stanley's Dream Charitable Endowment Fund, 2007
 Stephen Chandler Ericson Memorial Foundation, 2011
 Sunday Foundation, 2012
 Susan Groome Harney Memorial Foundation, 2000
 T&G Charitable Fund, 2005
 Teresa V. Garofalo VMD Memorial Scholarship Fund, 2011
 Terry Muzzy Scholarship Foundation, 2007
 Teti Family Foundation, 2006
Tick Tock Early Learning Center-Capital Campaign Gift Fund, 2016
 Tom & Betty Hess Charitable Fund, 2014
 Trajabay Charitable Fund, 2005
 Tres Foundation, 2003
 Tyler Family Foundation, 2005

Valerie Lamb Smith Art Foundation, 1998
 Vaughan Family Foundation, 2000
William S. Latoff Charitable Foundation, 2016
 Woody's Woods Memorial Foundation, 2003
 Zelinda LeBoutillier Charitable Foundation, 2011

FIELD OF INTEREST FUNDS

Adolescent Awareness Foundation, 2012
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 Eliza, 2017
Giving Circle-ChesCo Bar Young Lawyers Division, 2017
 Imprints Grantmaking Endowment Fund, 2009
 International Equine Conf on Laminitis & Diseases of Foot, 2008
 Neil Joines Fund, 2013
 PCHF Community Health Leadership Academy Fund, 2014
PCHF Community Needs Assessment Fund, 2016
 PCHF Executive Leadership Institute Fund, 2014
Richard Mahan & Margaret Murray Charitable Fund, 2017
 Spot Castle Foundation, 2003
 West Chester Adapted Fitness & Wellness Fund, 2016
 West Chester Walk of Fame Foundation, 2013
 Whitford Charitable Endowed Grantmaking Fund, 2014
 Whitford Charitable Fund Merriman Golf Outing, 2016
 Whitford Charitable Fund, 2011

FISCAL AGENT-INTERIM FUNDS

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

NONPROFIT ENDOWMENT FUNDS

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



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

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



STEPHEN CHANDLER ERICSON FOUNDATION, *est. 2010*

“One life makes a difference”



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.”



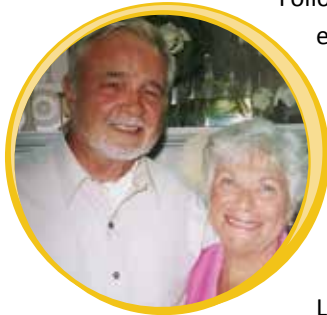
“Suddenly a bolt of lightning emerged, appearing simultaneously with a large crack of thunder. There was no storm. Only a flash. Fans were thrown from the metal bleachers, players lifted off their feet, the referee knocked over. Stephen was not only struck by the lightning—he was **surrounded** by it. 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:

“I took Stephen to Exton Mall to buy shoes for the school year. As we were leaving the mall, a young girl was entering with her father. The young girl was extremely disfigured and had several severe physical challenges. When Stephen and I reached the outside of the mall, Stephen turned to me and said, ‘Mom, did you see how beautiful her smile was...I hope people notice her beautiful smile!’ This is our Stephen.”

Following the sudden loss of their sixteen-year old son, Laura Chandler Ericson and Joseph Ericson, Jr. established a scholarship in Stephen’s name. Created in 1985, the Stephen Chandler Ericson Scholarship Fund made awards to seniors graduating from Stephen’s former school, the West Chester Christian School.



At the heart of any cause is a mission that drives it. The mission of the Stephen’s scholarship fund is to inspire young people to develop the mindset that **we are all in this life together** and that, indeed, **one life makes a difference.**

Lee Johnson Jr., Senior Captain of Stephen’s soccer team, was the first recipient of the scholarship in 1985. It has left a lifelong impact.

“My lasting impression of Stephen was the constant smile on his face. I don’t ever remember seeing him without it... I felt a responsibility and an obligation to do something with this scholarship long after college. The generosity of the Ericson family encouraged me to give back as well. For the past 10 years I have given my own scholarship out in remembrance of my father, to a senior graduate of West Chester Christian School. My wife Barbara and I have also started a foundation to help those in need.”

The Ericson Scholarship was initially awarded solely to students attending West Chester Christian School. Now the family also awards scholarships to Henderson High School seniors. In 2010, the Stephen Chandler Ericson Scholarship Fund became affiliated with the Chester County Community Foundation.

Stephen’s scholarship fund has made a substantial difference in many lives:

- 38 scholarships awarded
- 17 different colleges and universities
- 3 scholarship recipients now own businesses
- Majority of winners make Chester County their lifelong residence, impacting the local community



Since school administrators have the advantage of seeing the students daily, the Ericson family leaves the scholarship nomination and selection process up to the school. The family has outlined this criteria for potential scholarship recipients:

- Love of God
- Love of Family
- Sense of Humor
- Musical affinity, as Stephen played the saxophone
- Athletic ability, as Stephen was passionate about golf, baseball, swimming, and soccer
- Respect for others and community involvement



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

Lee Johnson, Jr – Melissa Jenkins – Charles White, Jr – Jenine Faith – Jennifer Berardi – Maxine Osborn – David Coover, Jr
Ruthann Smith – Edward Wendorf – Christopher Jenkins – KaraAnn Marinelli – Matthias Murphy – Rebecca Albright – Micah Murphy
Brian Lunger – Steve Roderer – Leon Yates – David Barfield – Mike Sheldon – Shannon Peters – Jeanne Celia – Amanda Fisher
Niki Railing – Kevin Sturgis – Tim Boston – Ben Hicks – Nathan Perrie – Heather Ollis – Stephen Fisher – Brittany Sadik
Olivi Grothaus-Blackstone – Heather Sadik

Henderson High School Scholars: 2012-2017

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



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."

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. Bill's mother welcomed everyone with incredibly warm hospitality and wonderful homemade meals over animated conversation.

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 Heib, CEO of DNB First.

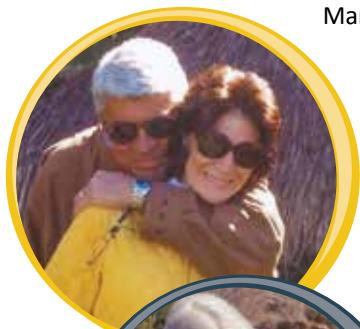
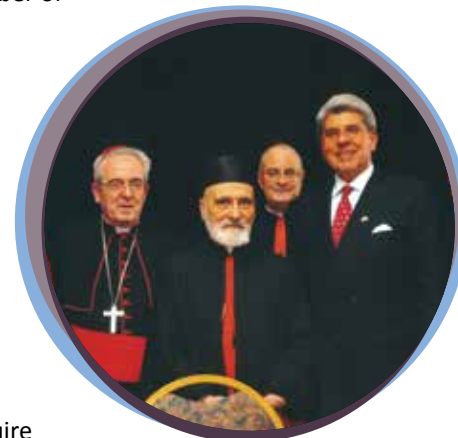
"We considered incorporating a private foundation," notes Skip Brion Esq. of Buckley Brion McGuire & Morris. "Then at one of our meetings, Mike DeHaven, a CPA, asked if we had thought about the **community foundation option.** We had heard of the community foundation, but didn't have much detail. We 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 Heib 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."



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.



"BILL WILLINGLY GAVE OF HIS TIME, HIS TALENT AND HIS TREASURE. HE WOULD ASK THAT WE ALL DO THE SAME."



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

LATOFF FUND SUGGESTED DONATION LEVELS

American Flag Pin Level	\$15,000
Tuxedo Level	10,000
Double Breasted Suit Level	5,000
Gold Cuff Links Level	2,500
Sport Coat Level	1,000
White Button-Down Shirt Level	500
Suede Loafers Level	100

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?



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 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 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.

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 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
\$140,000 = average fund size
Any gift amount can be added to existing funds.

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.

Benjamin Franklin



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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 - Tiramisú Gelato Bites
New Street Catering - Chocolate Mint Fusion Shooter & Mudslide Pudding Shooter
Whitford Country Club – Strawberries & Cream Mousse Cups

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Courtesy of Albert Lauber, Neuchatel Chocolates

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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 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.

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Teti Family Foundation

Mr. & Mrs. Louis N. Teti

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 Community Service Scholarship**

Edge Wallboard Machinery Company
 Rotary Club of Downingtown

**Tick Tock Early Learning Center
 Capital Campaign**

Anonymous

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 Ms. Marita Barber
 Mr. Jeb Barth
 Benchmark Federal Credit Union
 The Benecon Group
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 Bliss & Company
 Honorable & Mrs. David F. Bortner
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 The Brandywine Singers
 Brandywine Studio
 Brandywine Valley Heating &
 Air Conditioning
 Mr. JB Braun
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 Mr. Mike Burns
 Ms. Sandra Camarote
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 Mr. Edward Collison
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 Cozen O'Connor
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 Ms. Karen Walls
 Mr. Ryan Wentz
 Ms. Helen Wessling
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 Foundation
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 Medicine Associates
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 Ms. Dorene Winters
 Ms. Carol Zabriskie
 Zajac Group
 Zukin Realty

Valerie Lamb Smith Art Fund

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 Mr. John P. Odell

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 Endowment Fund**

Volunteer English Program in
 Chester County

**W. Thomas Musser Memorial
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Tri-M Group



**WC Henderson Class of 1953
 Scholarship Fund**

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**West Chester Downtown
 Foundation Grantmaking
 Endowment**

CCCF Grantmaking Fund for
 Chester County
 CCCF West Chester Trust & Relief
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 Mr. Joseph M. Crescenz
 Ms. Maryjane Hahn
 Mr. Kevin C. Kelly
 Ms. Judith O. Smith
 Mr. Robert G. Stone
 Vietnam Vets of America Chapter 436
 West Goshen Lions Club

**West Goshen Lions Club
 Charitable Fund**

West Goshen Lions Club
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 Mr. & Mrs. Bernard J. McGovern
 Mr. & Mrs. John F. McKenna

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 Whitford Country Club Swim Team
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 Ms. Rebecca Winiarski
 Mr. Christopher Yard
 YMCA Lionville Community

**Whitford Charitable Fund -
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 Buchanan Ingersoll & Rooney
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 Citi Business Services
 CitiBank
 Communications Test Design Inc.
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 Mr. & Mrs. David J. Evans
 Mr. Joseph Finley
 Firstrust Bank
 Fox Rothschild LLP
 Mr. & Mrs. John Gray
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 Mr. David Killen
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 Mr. Marcus Merriman
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 Mr. Timothy J. Scanlon
 Ms. Sheila Scanlon
 Transwall
 Mr. William Truchan
 Mr. Eric Tweer
 Mr. & Mrs. Thomas J. Wallace
 Ms. Gina Yoder

**William S. Latoff
 Charitable Foundation**

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 Aqua PA
 Ardmore Banking Advisors
 Mr. & Mrs. Joseph Brion
 Buckley, Brion, McGuire & Morris
 Chester County Economic
 Development Council
 Chester County Hospital Foundation

Chester County Industrial
 Development Authority
 Communications Test Design Inc.
 Mr. & Mrs. Michael A. DeHaven
 DellaVecchia, Reilly, Smith &
 Boyd Funeral Home
 Ms. Kathleen A. Demeter
 Mr. & Mrs. Barry Devine
 DNB First
 Mr. & Mrs. Robert E. Fenza
 Mr. & Mrs. Thomas A. Fillippo
 Mr. & Mrs. James Gagliano
 Gawthrop Greenwood PC
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 Benefits Concepts
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 Lamb McErlane
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**Woman's Club of Downingtown
 Charitable Fund**
 Woman's Club of Downingtown

**YMCA Kennett Area Educational
 Assistance Stipend Fund**
 Aaron & Jean Martin Fund
 Put Your Money Where Your
 Mouth Is Foundation

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

“REAL GENEROSITY TOWARDS THE FUTURE
 LIES IN GIVING ALL TO THE PRESENT”

- Albert Camus



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

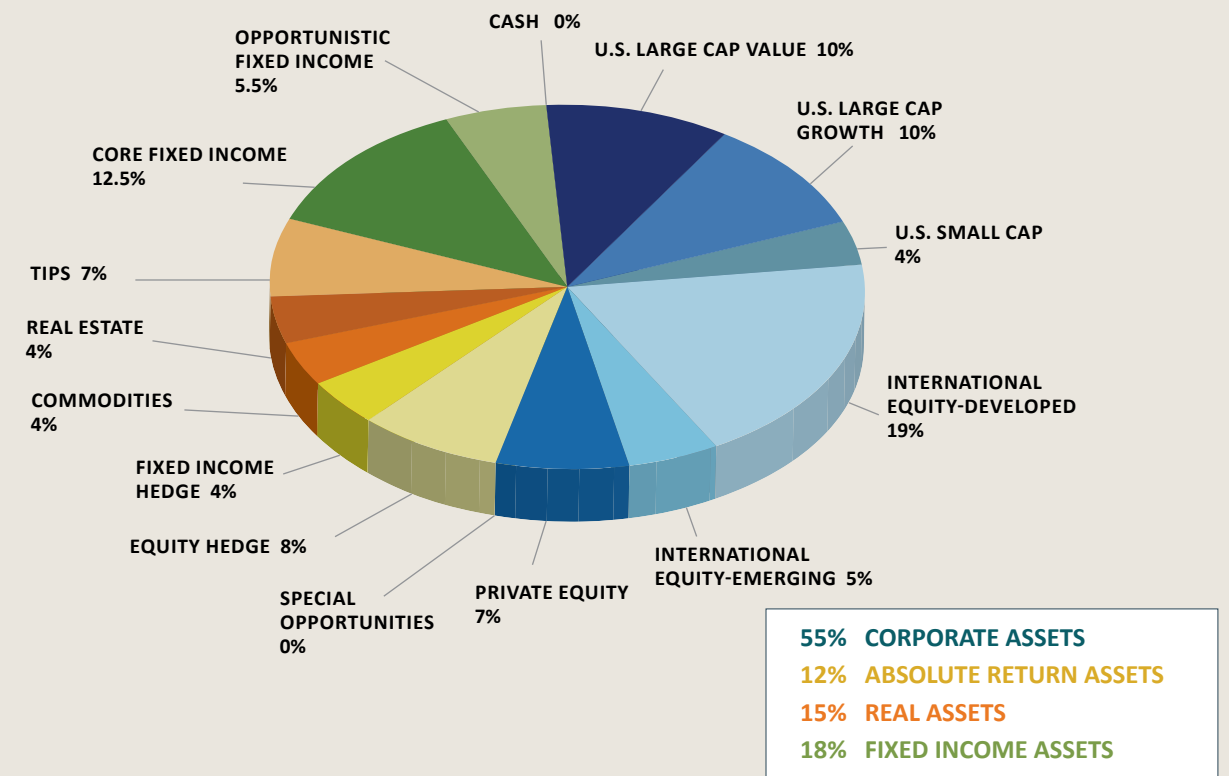
Endowed Funds Long Term Target Return: The Community Foundation desires a long term target return that provides portfolio growth, exceeds inflation, covers investment fee expenses, covers the Foundation's administrative fee, and covers the annual grant payout (of up to 5% of the previous fiscal year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

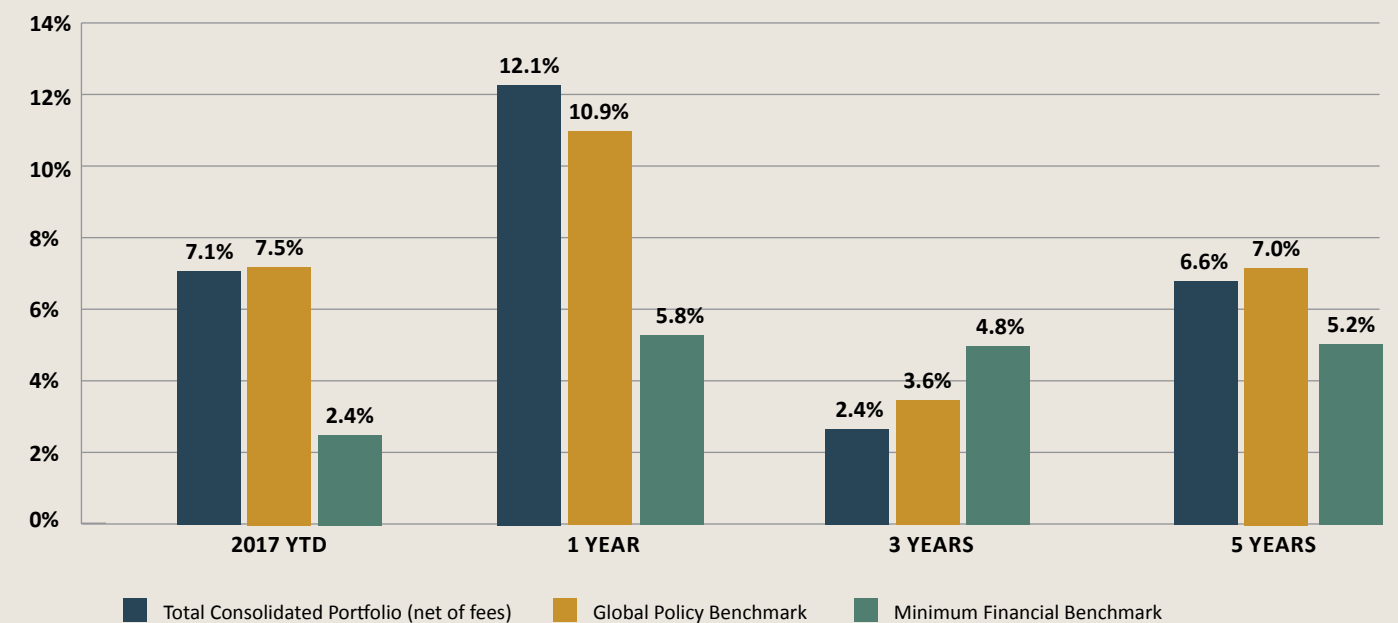
Policy Portfolio Structure and Ranges

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 CCF Aggregated Endowed Funds



Total Consolidated Annualized Returns for the Endowed Portfolio as of 6/30/2017





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>GOLD Foundation Funds Invested</p>	     
 <p>SILVER Planned Gift Pledge Investment Partner</p>	 
 <p>BRONZE 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.

Chester County
COMMUNITY FOUNDATION





“I WONDERED WHY SOMEBODY DIDN’T DO SOMETHING.
THEN I REALIZED, I AM SOMEBODY.”

- Unknown

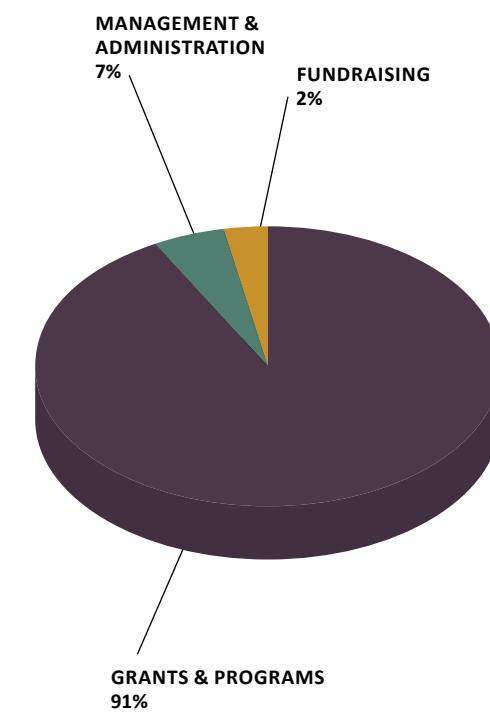
Finances

CHESTER COUNTY COMMUNITY FOUNDATION STATEMENTS OF FINANCIAL POSITION as of June 30

Audited by Umbreit Korengel & Associates

ASSETS	2017	2016
CURRENT ASSETS		
Cash & cash equivalents	\$4,655,718	\$2,357,326
Accounts & other receivables	49,718	20,000
Prepaid expenses	23,277	14,206
Certificates of deposit	1,133,593	1,118,416
Marketable securities	46,278,064	42,496,538
Note receivable	264,119	264,119
TOTAL CURRENT ASSETS	\$52,404,489	\$46,270,605
Property & equipment, net	381,825	407,583
Unconditional promises to give, net	26,911	18,055
TOTAL ASSETS	\$52,813,225	\$46,696,243
LIABILITIES		
Accounts payable & accrued expenses	\$67,112	\$71,676
Annuities payable	200,505	265,644
Not-for-profit endowments	5,221,379	4,669,986
TOTAL LIABILITIES	\$5,488,996	\$5,007,306
NET ASSETS		
Unrestricted	\$47,253,058	\$41,650,882
Temporarily restricted	71,171	38,055
TOTAL NET ASSETS	\$47,324,229	\$41,688,937
TOTAL LIABILITIES AND NET ASSETS	\$52,813,225	\$46,696,243

USES OF FUNDS



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



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Vice Chair

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Principal, Belfint Lyons & Shuman
Corporate Secretary/Treasurer

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Partner, MacElree Harvey
Immediate Past Chair

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Joanne Peskoff Bear, Esq.
Community Volunteer

Carol Clark
Community Volunteer

John Diederich, CFA
Director of Investment Strategy
Dock Street Capital

SPECIAL THANKS

The Community Foundation Board acknowledges the dedicated service of 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.



Meg Freeman
Community Volunteer

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Partner, Gawthrop Greenwood

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Community Volunteer

Ann Spencer Hutton
Community Volunteer

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Managing Director, SRS Capital Advisors

L. Peter Temple, Esq.
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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Wiggie Featherman
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Eva L. Verplanck, Ph.D.
Carol Ware, Ph.D.

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

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

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Steven A. Norcini
Patrick South, CFA
Louis N. Teti, Esq.
Philip C. Wagner, CFA

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These advisors consistently help strengthen legacy philanthropy by providing information, expertise and introductions.

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Kristine Kimmell, Esq.
Timothy Knauer, Esq.
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MBA
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Kathleen A. Wilczek, CPA

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Thanks to our interns who have gone onto new positions:
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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.**