Timeline & Milestones

1994 (pictured left) Founders photo taken at the Lukens home office in Coatesville. Mercer W. Jones, Michael Rawl, Dr. Henry A. Jordan, Elizabeth Ranney Moran, RW Van Sant, Lee Foote, Louis J. Beccaria Ph.D., Carol Ware Ph.D., John A. Featherman III Esq., James P. Dunigan.

\$659K

– Buy & Move to

West Chester

Lincoln Building,

Jordan Award -

Created

⊢ 3 Affiliate Funds Created

2004 (pictured right) 10th Anniversary Founders photo taken at Brushwood Stable Gala in Malvern. John A. Featherman III Esq., Louis J. Beccaria Ph.D., Carol Ware Ph.D., Charles Lukens Huston III, Elizabeth Ranney Moran, Dr. Henry A. Jordan.





National Standards Accreditation

\$57M

Anniversary

-Strategic Plan

-25th

- Esq. & CPA Momentum

\$176K

– Founded

– Terracina Office Coatesville

– Aaron Martin, 1st Donor Advised Fund Created

\$8M

- Women & Girls Affiliate Fund obtained its own 501c3

Endowment
Campaign #1

- CEO Transition Rawl to Simmons



Futures Affiliate
 Fund obtained its
 own 501c3

– Behind the Scenes Tours Start

- Strategic Plan Refocus

\$17M

– 1st Charitable Gift Annuity

- Business Affairs = YPTC

10th Anniversary Gala

\$22M

Sustainability -Task Force

Sweet Charity Start

IT Upgrade Increases Efficiency

\$22M

CC2020 Affiliate Fund obtained its own 501c3

Imprints Launched

_ Endowment Campaign #2

\$22M

Lincoln Building
 Renovations

- Trustee Institute Launch

National Standards
 Accreditation

– Strategic Plan Refine; Enhance Marketing

\$29M

– Fund Policy/Focus on Core

Long Term Sustainability

– Business Affairs Hires Full Time Controller

Diversify Esq.

Investment

Partners

- Pilot Medallion

\$43M

– Family Philanthropy

Nonprofit Legacy
 Services

Imprints toThe PLAN

Planned Gift Growth

主芸

Giving Circles

5-5-











2006







2012



2014







Dr. Henry A. Jordan

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