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 Dr. James A. Orsini  
 Thoroughbred Education  
 & Research Foundation  
 Ms. Lucy Zungailia

**Tom & Debbie Anderson  
 Foundation**  
 Mr. & Mrs. Thomas J. Anderson

**Trajabay Charitable Fund**  
 Mr. Andrew Merz & Mrs.  
 Anne Broussard

**Trillium Fund**  
 Mr. & Mrs. Gary Murphy

**United Way Southern Chester  
 County Endowed Fund**  
 Eva L. Verplanck, Ph.D.

**Vicky L. Tribbitt Charitable Fund**  
 Ms. Vicky Tribbitt

**W. Thomas Musser Memorial  
 Charitable Fund**  
 Tri-M Group

**West Chester Downtown  
 Foundation-Up on the Roof**  
 Benecon Group  
 Brandywine Valley Heating &  
 Air Conditioning

Mr. & Mrs. Allen R. Burke  
 Ms. Valerie Dunn  
 Fulton Bank  
 Gawthrop Greenwood  
 Dr. & Mrs. Leonard Giunta  
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 MacElree Harvey  
 Ms. Emily McClure  
 Pine Street Carpenters  
 Ray Ott & Associates  
 Ms. Glen Reyburn  
 Rothwell Document Solutions  
 Thomas Comitta Associates  
 Tolsdorf Oil Lube Express  
 Zukin Realty

**West Chester Food  
 Cupboard Fund**  
 West Chester Food Cupboard

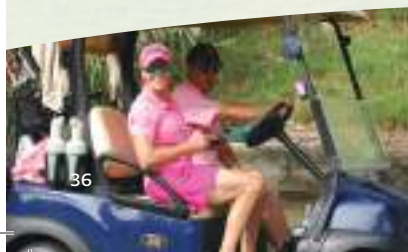
**West Goshen Lions Club  
 Charitable Fund**  
 Mr. & Mrs. John F. McKenna  
 Ms. Renee Zuckerbrot

**Whitford Charitable Foundation**  
 Advisors Mortgage Group  
 Mr. James L. Baker  
 Mr. Bryan Benner  
 Mr. & Mrs. M. Andrew Benton  
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 Mr. Todd Cottingham  
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 Kildares  
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 Steven M. Seide, CFP®, CLU  
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 Mr. Chris Swanson  
 Mr. & Mrs. Bret L. Von Urff  
 Whitford Country Club  
 Mr. Michael C. Williams

**William S. Latoff Charitable  
 Foundation**  
 Mrs. Mary Demetor Latoff  
 Mr. & Mrs. A. Joseph Rubino

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



# Investments

## 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 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.

## 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.

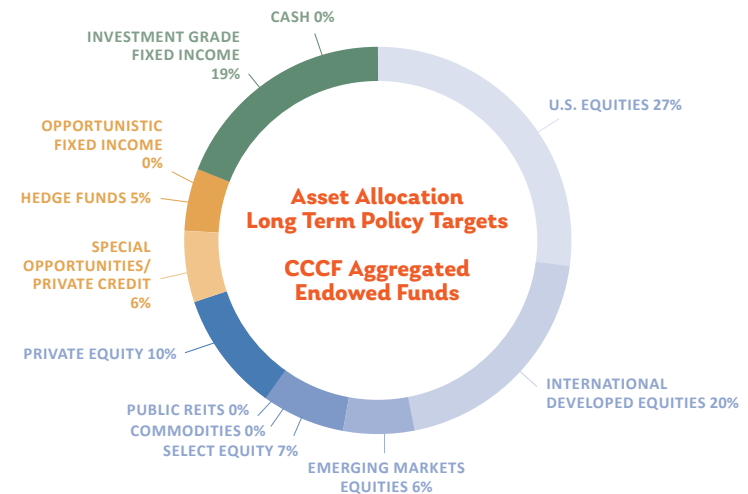
## Quasi-Endowed Funds Long-Term Target Return

- 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 partially a potential annual grant payout (of up to 20% of the previous fiscal year end balance).

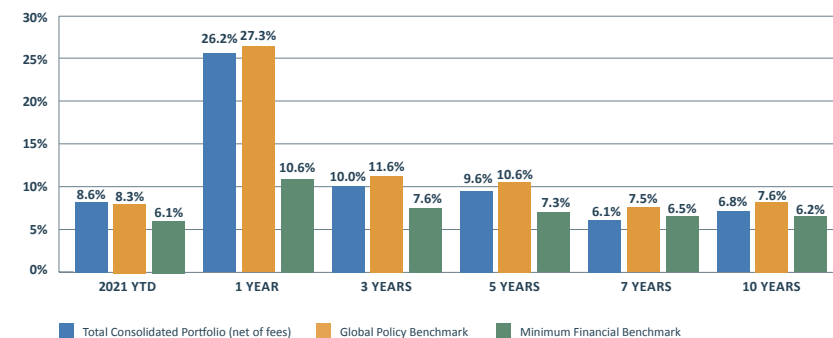


## Policy Portfolio Structure and Ranges

ASSET CLASS	BENCHMARK	ENDOWED RANGE	QUASI RANGE
GROWTH	ACWI ETF	60% – 80%	40% – 60%
DIVERSIFIERS	Bar Cap ETF	0% – 30%	0% – 20%
TOTAL FIXED INCOME	Blend	10% – 40%	20% – 60%



## Total Consolidated Annualized Returns for the Endowed HC Portfolio as of 6/30/2021



**GROW: INVESTMENT MANAGEMENT**

**Chief Investment Officer Firm  
Aggregate Invested Assets**

**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 also retains and directs 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 & 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 firms which pass an annual due diligence review undertaken by the Foundation's Investment team.
- Medallion funds are separately managed, non-aggregated funds, which receive their own investment return.
- 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.



**There are three Levels of Medallion Investment Partners for Separately Managed Accounts:**

<p><b>GOLD</b> FOUNDATION FUNDS INVESTED</p>	
<p><b>SILVER</b> SILVER PLANNED GIFT PLEDGE INVESTMENT PARTNER</p>	
<p><b>BRONZE</b> PRE-APPROVED AS MEDALLION PARTNER, NO FUNDS YET</p>	<p>To learn more, contact <a href="mailto:jason@chescof.org">jason@chescof.org</a>.</p>

**We Help You Find the Best Charitable Solutions**

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

- the client knows their own needs & desires
- the advisor understands financial & 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, to help fulfill dreams of giving to the community, now and forever.

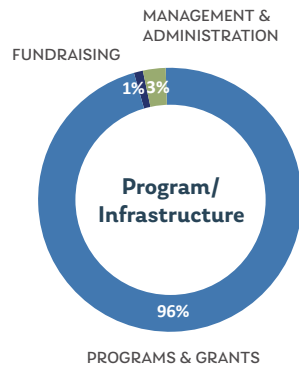
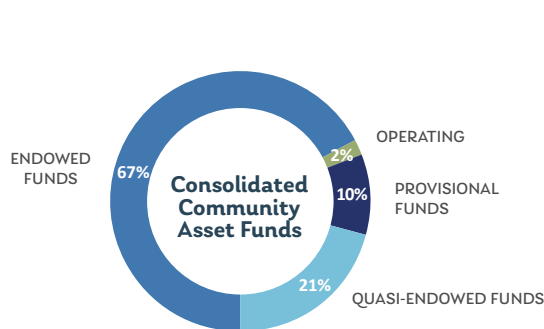


# Statement of Financial Position

as of June 30

Audited by  bbd

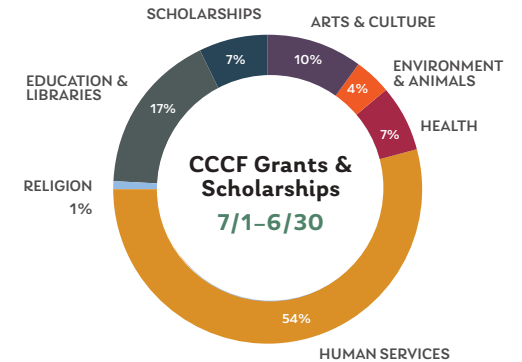
	Audited 2021	Audited 2020
<b>ASSETS</b>		
Cash	\$ 3,963,365	\$ 2,591,080
Contributions receivable	3,750,000	-
Prepaid expenses	36,417	33,788
Certificates of deposit	1,445,659	1,428,857
Investments	82,284,572	65,059,679
Property and equipment, net	284,098	298,394
<b>TOTAL ASSETS</b>	<b>\$ 91,764,111</b>	<b>\$ 69,411,798</b>
<b>LIABILITIES</b>		
Accounts payable and accrued expenses	\$ 53,958	\$ 51,230
Grants payable	700,610	162,358
Annuitiy obligations	208,429	206,037
Loan payable - Paycheck Protection Program	-	129,800
Nonprofit endowments	7,310,144	5,807,439
<b>TOTAL LIABILITIES</b>	<b>\$ 8,273,141</b>	<b>\$ 6,356,864</b>
<b>NET ASSETS</b>		
<b>Without donor restrictions</b>		
Operating	\$ 1,938,599	\$ 1,773,559
Board designated	77,802,371	61,281,375
<b>TOTAL NET ASSETS WITHOUT DONOR RESTRICTIONS</b>	<b>\$ 79,740,970</b>	<b>\$ 63,054,934</b>
<b>With donor restrictions</b>	3,750,000	-
<b>TOTAL NET ASSETS</b>	<b>\$ 83,490,970</b>	<b>\$ 63,054,934</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$ 91,764,111</b>	<b>\$ 69,411,798</b>



# In FY21, \$8.2 million was awarded:

791 grants @ \$7.7 million  
222 scholarships @ \$500,000

Most grant decisions are made by the families & individuals whose funds the Community Foundation holds in trust.



- A Haven
- Act in Faith of Greater West Chester
- Aidan's Heart Fdtn
- Alianzas de Phoenixville
- ALS Hope Fdtn
- Alzheimer's Fdtn of America
- American Assoc for Cancer Research
- American Cancer Society
- American Fdtn for Suicide Prevention, NY
- American Friends Service Committee
- American Philosophical Society
- Amigos de Jesus
- Amnion
- Andrew McDonough B+ Fdtn
- Angels Against Addiction Fdtn
- Animal House Project
- Ann's Heart
- ARC of Chester County
- Archbishop John Carroll High School
- Archmere Academy
- Area Residents Caring & Helping
- Assoc for the Colonial Theatre
- Atlantic Salmon Federation
- Avon Grove Library
- Baldwin School
- BalletX
- Barclay Friends
- Barn at Spring Brook Farm
- Barnstone Arts for Kids
- Bartram's Garden
- Bella Mente Quantum Racing Assoc
- Belmont Child Care Assoc
- Benchmark School
- Berwyn Fire Company
- Bishop Shanahan High School
- Blue White Scholarship Fdtn
- Borough of West Chester
- Bournelyf Special Camp
- Boy Scouts of America, ChesCo Council
- Boys & Girls Club of Boston
- Brandywine Ballet Company
- Brandywine Baptist Church
- Brandywine Conservancy
- Brandywine Health Fdtn
- Brandywine Red Clay Alliance
- Brandywine Valley Chorale
- Brandywine Valley SPCA
- Bridge Academy & Community Center
- Bridge of Hope
- Bridge of Hope of Lancaster & ChesCo
- Bringing Hope Home
- Brothers of the Christian Schools
- Cab Calloway Fdtn
- Camp Dreamcatcher
- Camphill Special School
- Canine Partners for Life
- Casa Guanajuato
- CeaseFirePA
- Center for Independent Documentary
- Charles A. Melton Art & Education Center
- ChesPenn Health Services
- Chester County 2020
- Chester County Art Assoc
- Chester County Christian Chorale
- Chester County Dept of Community Development
- Chester County Dept of Drug & Alcohol Services
- Chester County Food Bank
- Chester County Fund for Women & Girls
- Chester County Futures
- Chester County Hospital Fdtn
- Chester County Library
- Chester County Women's Services
- CheyneyStrong
- Child Guidance Resource Centers
- Children's Country Week Assoc
- Children's Hospital of Phila Fdtn
- Christ Community Church
- Christo Rey Philadelphia High School
- Citizen Advocacy of ChesCo
- City Gate
- Clinic, The Coatesville Area Senior Center
- Coatesville Bible Fellowship
- Coatesville Community Edu Fdtn
- Coatesville Veterans Affairs Medical Center
- Coatesville Youth Initiative
- Communities that Care of Gr Downingtown
- Community Action Agency of DelCo
- Community Bible Fellowship Church
- Community Coalition
- Community Volunteers in Medicine
- Community Warehouse Project of ChesCo
- Concord Carlisle Community Chest
- Confederation of Meningitis Orgs
- Cornell Univ
- Cornerstone For Hope
- County Corrections Gospel Mission
- Coventry Food Pantry
- Crime Victims' Center of ChesCo
- Cru
- Daemion Counseling Center
- Daniel Fdtn
- David's Drive 831



## INSPIRE: GRANTEES

Deb Mitchell Educational Scholarship Bethel Baptist	Fisher House Fdtn Forgotten Cats Fred's Footsteps	International Fund for Animal Welfare Isaac Bruce Fdtn Ivy Hill Fdtn J. Wood Platt Caddie Scholarship Trust Jenkins Aboretum Jenner's Pond Jesuit Center at Wernersville Joseph's House of Camden Justice Rescue Juvenile Diabetes Research Fdtn K9s for Warriors Kacie's Cause Kendal-Crosslands Communities Kendalls Crusade Kennett After-School After the Bell Kennett Area Community Services Kennett Area Park Authority Kennett Area Senior Center Kennett Consolidated School District Kennett Flash Kennett Library Kennett Middle School Kennett Monthly Meeting Kennett Square Lions Club Kennett Symphony of ChesCo Kensington Burial Ground Palmer Cemetary Assoc Keystone Valley Fire Department Kiwanis Club of Phoenixville Rutztown Univ Fdtn La Comunidad Hispana Ladacin Network	Lancaster Bible College Lancaster General Health Fdtn Lantern Theater Company LaSalle Academy LaSalle Univ Lasata Farm Lifeline Family Center Lighthouse Youth Center Living Beyond Breast Cancer London Grove Friends Meeting Lord's Pantry of Downingtown Lucky Dawg Animal Rescue Magee Rehabilitation Hospital Fdtn Main Line Animal Rescue Maloto Malvern Retreat House Mann Center for the Performing Arts Martin Luther King Community of Gr Kennett Area Masters School Maternal & Child Health Consortium Meals on Wheels of Chester County Midatlantic Horse Rescue Mill at Anselma MontCo Office of Children & Youth Moore College of Art & Design Mount Aviat Academy Mt. Hope Nazarene Retirement Community Mt. Pleasant High School Mushroom Festival Musicopia National Brain Tumor Society	Natural Lands Neighbor Helping Neighbor Neighborhood Hospice New York City Relief New York Yacht Club Fdtn Newport Hospital Fdtn Norristown Zoological Society North Star of ChesCo Northern California Auto Racing Nottingham County Park Open Table Orion Communities Our Lady of Angels Regional Catholic School Oxbridge Academy Fdtn Oxford Area Neighborhood Services Center Oxford Church of the Nazarene Oxford Educational Fdtn Oxford Mainstreet Oxford Senior Center PA Assistive Technology Fdtn PA Council of Deliberation Youth Assoc PA Home of the Sparrow Paoli Fire Company Paoli Hospital Fdtn Paoli Presbyterian Church Parish Hall Kitchen Parkesburg Library Partners in Outreach Penn State Brandywine Penn State Dance Marathon People For People People's Pantry at Church Road Petals Please Peter's Place Petra Community Housing Phila Chamber Music Society Phila Orchestra Assoc	Phila Ronald McDonald House Phila Zoo Philabundance Phoenixville Area Children's Learning Center Phoenixville Area Community Services Phoenixville Area Police Athletic League Phoenixville Area Senior Adult Activity Center Phoenixville Community Education Fdtn Phoenixville Public Library Phoenixville Women's Outreach - The House Pitch In For Baseball & Softball Plumpton Park Zoological Gardens Police Athletic League of Phila Pottstown Area Children's Fdtn Pottstown Cluster of Religious Communities Primitive Hall Fdtn Pro-Vision Quaker City Farmers R.J. Leonard Fdtn Radar Project Read2Dream Fdtn Redeem RESOLVE: National Infertility Assoc Retired Racehorse Project Riddle Health Care Fdtn Rowan Univ Fdtn Rubican Fdtn S. ChesCo Emergency Medical Services Sacred Heart Church Safe Harbor Saint Joseph's Univ SALT PA Salvation Army of Gr West Chester Salve Regina Univ	San Jose State Spartan Fdtn/Football Sanford School Save the Children Science Club for Girls ServeNow Serving Inspiring & Loving Others Shake It Off Special Leisure Services Fdtn St. Agnes Day Room St. Anne's Episcopal School St. Francis of Assisi School St. Luke Evangelical Lutheran Church St. Mary's Franciscan Shelter St. Paul's Baptist Church Stroud Water Research Center Support Center for Child Advocates Surfside Recovery Services Surgicorps International Surrey Services for Seniors Swarthmore College Team CMMMD Thorncroft Equestrian Center Thoroughbred Retirement Fdtn Tick Tock Early Learning Center Tom Coughlin Jay Fund Transition Dynamics Associates Trustees of U of PA Turner Syndrome Society of U.S. Unite for HER United Way of ChesCo United Way of Gr Phila & SNJ United Way of S. ChesCo Univ of Delaware Uptown Entertainment Alliance	Veterans Assoc of Easttown & Tredyffrin Township Veterinarian School at U of PA Villanova University Voca Center Volunteer English Program Wayne Art Center Wentworth, The West Chester Area Day Care Center West Chester Area Senior Center West Chester Dance Works West Chester Downtown Fdtn West Chester Food Cupboard West Chester Parks & Recreation West Chester Public Library West Chester Univ Fdtn West Goshen Lions Club Westtown Goshen Rotary Fdtn Wharton Esherrick Museum Williamson Free School of Mechanical Trades Willistown Conservation Trust Willistown Friends Meeting-Educational Fund Wilson College Wounded Warrior Project YMCA of Gr Brandywine YMCA Wilkes-Barre Young Life Capital Region Young Life Liberty Region Young Life of S. ChesCo Young Moms Youth Mentoring Partnership Zero - The End of Prostate Cancer
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Investment  
Governance & Nominating  
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Scholarship Award Panels  
IDEA Council: Inclusion, Diversity, Equity & Access  
ROC Reinventing Our Communities  
Phila Federal Reserve Bank  
Outreach Council-Estate Attorneys  
Outreach Council-CPAs

Outreach Council-Wealth Managers  
Prospect Cultivation Planning  
Cultural Alliance of ChesCo:  
Culture Builds Community  
ConnectChesCo/BizOnBoards  
Feasibility  
Strategic Plan Review  
CEO Appraisal

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

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**Community Engagement Officer**

Hugh Bleemer  
**Community Engagement Officer  
Racial Equity & Community Wealth**

Malcolm Johnstone  
**Community Engagement Officer  
Arts, Culture & Historic Preservation**



We gratefully acknowledge our team of interns from West Chester University, who help with accounting data entry, database updates, research, website updates, social media, special events, and hundreds of administrative tasks.

