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FINANCIAL SUMMARY
A LETTER FROM OUR CHAIRMAN

In 1982, ten area residents acted on a philanthropic vision to make a positive difference in our community. As the world continues to change, so has the Truman Heartland Community Foundation (THCF). Today, our mission calls for us to connect money and resources in new ways to make a profound, lasting impact - empowering lives for the better. We call it EMPower, evolving how money works to make a difference.

There’s no secret that money makes a difference when it is strategically invested in our community. THCF continues to be a leader in philanthropic giving, providing an effective and easy way for donors to meet their charitable giving goals. In 2016, we received $5.7 million in contributions from donors. We now have more than 600 funds as part of THCF, a number that increased by 34 funds in 2016.

A key driver of our non-profit community’s financial future is the Heartland Legacy Society, a special group of individuals who have chosen to leave a lasting legacy by including THCF in their estate plans. In 2016, we added 14 new members to the Heartland Legacy Society, bringing total membership to 137.

The healthy growth in assets and new contributions allowed us to distribute a total of $3.35 million in grants and scholarships in 2016. Included in this was $234,582 in scholarships given to local high school seniors, undergraduates and technical students, a 19% increase over the previous year. Another $294,034 was awarded to 51 organizations through community grants.

After grants were made, the total assets invested in the Foundation at the end of 2016 stood at $38.250 million, an increase of 10% over the previous year. The portfolio return for 2016 was 7.2%.

Just as money makes a difference, so does the work we’re doing to increase engagement, introduce new generations to charitable giving and bring community members together to discuss, identify and develop strategies to address critical needs.

Nearly 20 years ago, we launched the THCF Youth Advisory Council (YAC). Membership has grown to 180 high school students from 13 schools in Eastern Jackson County. In 2016, YAC members collected more than 50,000 in food items for area residents in need. They also held a successful fundraiser and saw firsthand the impact of their work by distributing $2,600 grants to five local charities.

The Community for All Ages Coalition released a research report in conjunction with a local university that identifies the needs of those aged 65 and older and how our community can help them live healthier, more active lives. With the more than 60 members of the Coalition, we are also spearheading programs to provide transportation and other services to our growing aging population.

Of course, the work we do would not be possible without active community involvement. On behalf of THCF, I would like to express my sincere thanks to the Board of Directors, Advisory Board members and volunteers who work with our dedicated staff to empower lives for the better. Their gifts of time and expertise and the continued charitable support of our donors are the power behind what we do each and every year.

It has been my honor to serve as the Chairman of the Board, and I look forward to what we can accomplish together as we continue to evolve how money works to make a difference.

David Jeter, 2016 Chairman of the Board
2017 ADVISORY BOARDS

BLUE SPRINGS/GRAIN VALLEY

CHAIRMAN
Tina Parsley Hughes

VICE-CHAIRMAN
Rebecca Knepper

SECRETARY
Dyan Herdzina

Michael Banks
Jerry Carey
Bryan Gash
John Hardy
Harvey House
Marty Napier
Sara Stiles
Nicole Underwood
Ellen Ward

INDEPENDENCE/SUGAR CREEK

CHAIRMAN
Adam Kliethermes

VICE-CHAIRMAN
Dennis Taylor

SECRETARY
Susan Wray

Dwight Barnhard
Bridget Casey
Michele Crumbaugh
Doug Horn
Clarence Lawrence
Dave Mayta
John McEvoy
Debbie O’Renick
Mark O’Renick
Billie Preston
Tracy Rogers
Stan Salva
Natalie Sevy
Tom Woodward

LEE’S SUMMIT/LAKE WINNEBAGO

CHAIRMAN
Kathy Hughey

VICE-CHAIRMAN
Beto Lopez

SECRETARY
Pam Stepp

Paula Belser
Carey Casey
Karen Dexter
Gary Fruits
Deanna Gilbert
Fred Grogan
Julia Hampton
Kathryn Harvel
Todd Haynes
Mike Kelly
Rosalie Newkirk
Machelle Riffe
Amanda Robinson
Mary Stilley
Steve Summers
Kim Berwald Viar
Bob White
Sharon Williams

RAYTOWN

CHAIRMAN
George Koepp

VICE-CHAIRMAN
Steve Shelton

SECRETARY
Rev. Orin Cummings

Martha Cockerell
Tom Cole
Melissa Curry
Pat Ertz
Christie Hammond
Loretha Hayden
Terry Landers
Danielle Nixon
Stacey Payne
Allan Thompson
Mike Watkins

TRUMAN HEARTLAND COMMUNITY FOUNDATION STAFF (PICTURED LEFT TO RIGHT)

Shannon Sundberg, MFA, Director of Advancement

Elizabeth McClure, Director of Programs & Donor Services

Phillip J. Hanson, MPA, President & CEO

Rachael Cassidy Watkins, MFA, Assistant Director of Programs & Donor Services

Lynn Oltmanns, Administrative Assistant

Cheryl Klotz, Office Manager

Beverly Powell, CPA, Chief Financial Officer
Introducing new generations to charitable giving is a key building block for the future. The Youth Advisory Council (YAC) gives 180 high school students in Eastern Jackson County hands-on experience in fundraising, volunteering and grant making. From promoting and selling tickets to Strike in the Night, the annual YAC fundraiser, to collecting food donations for social service organizations, students learn how rewarding community service can be. Through the process of grant review and distribution of funds from the YAC endowment, they also see the real impact of their work on lives and communities.

LEADERSHIP TEAM

BLUE SPRINGS HIGH SCHOOL
Rebecca Dorman
Ling Rudicil
BLUE SPRINGS SOUTH HIGH SCHOOL
Kadie Clark
Tori Davenport
Caleb O’Donnell
FORT OSAGE HIGH SCHOOL
Jordyn Krause
Kaitlin Evans
GRAIN VALLEY HIGH SCHOOL
Sophia Barra
Evan Creswell
LEE’S SUMMIT HIGH SCHOOL
J.T. Cornelius
Brayden King
LEE’S SUMMIT NORTH HIGH SCHOOL
Isabel Baughn
Quentin Brown
Emily Gerber
LEE’S SUMMIT WEST HIGH SCHOOL
Liz Endecott
Alex Marko
Katie Richardson
RAYTOWN HIGH SCHOOL
Hanine Alhaydar
Hope Romero
RAYTOWN SOUTH HIGH SCHOOL
Chris Brocker
Holly Sullivan
SUMMIT CHRISTIAN ACADEMY
Kayla Kernsvaal
TRUMAN HIGH SCHOOL
Maddox Dockins
Rachel Millard
Jessica Rivera
VAN HORN HIGH SCHOOL
Vanessa Ramirez
WILLIAM CHRISMAN HIGH SCHOOL
Jose Mendoza
Jennifer Soendker
## YAC 2016 YEAR IN REVIEW

INSPIRING YOUNG PEOPLE TO PAY IT FORWARD

<table>
<thead>
<tr>
<th>24 GRANT PROPOSALS REVIEWED AND 24 ON-SITE VISITS</th>
<th>FILL THOSE TRUCKS COLLECTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>($112,600) WORTH OF REQUESTS</td>
<td>50,000 WORTH OF DONATED FOOD ITEMS FOR RAYTOWN EMERGENCY ASSISTANCE PROGRAM, LEE’S SUMMIT SOCIAL SERVICES AND COMMUNITY SERVICES LEAGUE</td>
</tr>
</tbody>
</table>

### ORGANIZATIONS REVIEWED:

- Blue Springs Family YMCA
- Child Abuse Prevention Association
- Coldwater of Lee’s Summit
- Coterie Theater
- Family Conservancy
- Gillis Center
- HOPE Dental
- Hope House
- Jackson County Court Appointed Special Advocates
- Jackson County Health Department
- Junior Achievement
- Kauffman Center for the Performing Arts
- KCUMB - Score 1 for Health
- Marian Hope Center for Children’s Therapy
- Marillac
- Play to Learn Preschool
- Powerhouse Theatre
- Rachel House
- Rainbow Center
- ReDiscover
- St. Luke’s East - Athletic Heart Clinic
- Stone Church - Neighborhood Dinner
- Summit Church - Summer Lunch
- Truman Library

### GRANTS AWARDED:

- $2,600

### COMMUNITY SERVICE:

- 973 HOURS

### SCHOLARSHIPS AWARDED:

- ELIZABETH HILL MCCLURE SCHOLARSHIP AWARDED TO
  - MARIAH GILBERTSON

- HENRI E. GOETTEL YOUTH IN PHILANTHROPY AWAREDEO TO
  - KADREONA SHANE
2016 ACHIEVEMENTS FOR OUR COMMUNITY

OLDER ADULT MOBILITY/TRANSPORTATION WORK UNDERWAY
- Convening local city leaders to plan for transportation for older adults when they are no longer able or do not wish to drive (a big challenge in our car-centric suburban area).
- Partnering with the Mid-America Regional Council (MARC) and the Kansas City Area Transportation Authority (KCATA) to bring services like the taxi voucher program to our Eastern Jackson County community.
- Representing the community by serving on the Mobility Advisory Committee which makes recommendations on federal grant requests for transportation services for older adults and people with disabilities.

CIVIC ENGAGEMENT
- Research study on Civic Engagement was completed by the UMKC Consortium for Aging in Community (report available at thcf.org).
  - Implementing a plan in 2017 to enable Boomers to Get Connected with Volunteer Opportunities
- Several major employers provided “Explore Your Future” workshop for their employees planning for retirement
- Assisted MARC with bringing the Age Mastery Program to our region
- With a growing number of retirees who are healthy and living longer than previous generations, we believe we have a “Longevity Bonus” that our community needs to tap into.

PARTNERING WITH MARC’S KANSAS CITY COMMUNITY FOR ALL AGES INITIATIVE
- Actively serve on the Advisory Board and chair their Civic Engagement Committee.
- Connecting local cities to MARC’s Community for All Ages Recognition program with Raytown, Independence, Blue Springs and Lee’s Summit participating.
- Supporting efforts to bring Age Mastery Program of the National Council on Aging to our community.
- Providing Civic Engagement laboratory by sharing our learning from our Civic Engagement research with the metro region.
Our more than 60 member Community for All Ages Coalition continued its commitment to ensuring our Eastern Jackson County Community is collaboratively and proactively working together so that we are prepared for the challenges and opportunities created by a doubling of the age 65+ population in our community in the next 15 years. In just 3 years (2020) one in five in our community will be over age 65 as 500 Boomers each month reach the age of 65 in our Eastern Jackson County area.

**EASTERN JACKSON COUNTY DEMOGRAPHICS**
TRUE EXAMPLES OF GIVING GOOD THAT GROWS FOREVER

The Heartland Legacy Society is made up of 130+ members who, through thoughtful planning, have made provisions in their estates to benefit charity. Many of our friends have made plans for future gifts to be added to their family funds, while others are establishing their family funds with their estate gifts and leaving a legacy of philanthropy.

On behalf of future generations, we thank our friends for their vision and forethought by establishing future gifts to their funds to benefit the causes closest to their hearts.

YEAR 1

$100,000 LEGACY GIFT

YEAR 25

$186,000 IN CUMULATIVE GRANTS AND SERVICES*

$190,000 FUND BALANCE

YEAR 50

$360,000 FUND BALANCE

$541,000 IN CUMULATIVE GRANTS AND SERVICES*

*ASSUMES 5% ANNUAL PAYOUT AND 8% RATE OF RETURN
Becoming a Legacy Society Member this year is simple. Contact your Community Foundation staff today and share your plans to include your fund (or establish your fund) through a beneficiary designation, will, trust, life insurance policy, charitable gift annuity or other planned gift. You will be invited to join the Heartland Legacy Society.

*Matured gifts  **Denotes new members to our Legacy Society in 2016

HEARTLAND LEGACY SOCIETY MEMBERS

Anonymous - 26 members
Eldon and Bonnie Anderson
L. Joseph Arth
Carol S. Baker
Charles and Sally Baldwin
Paul and Gail Barham
Dorothy D. Bay*
Jerry and Doreen Benton
Joe and Janice Blackburn
Larry and Susan Blick
James D. Browning*
Ron and Caryl Bruch
Donna G. Bullock*
Gene and Joanne Cable
Carol Carpenter
Beverly A. Cathcard*
Earl Kenneth Cavanah*
Kenneth and Cindy Cavanah**
Wayne and Stephanie Chipman
Roberta Coker
Phyllis D. Combest
Byron Constance
Larry and Wanda Cook
J.D. and Jeanne Cooper
Missy Curry
Norman, Mary Anne and Chris Davidson Foundation
Marvin and Dixie Droge
John and Jeanie Ferguson
Ron and Karen Finke
Carol Floyd**
Chuck and Colleen Foudree
Helen French
Noel and Carolyn Fulkerson
William Gann
David and Jeanne Geiman
David and Henri Goettel
Dr. Fred and Marge Hahn
Harold and Mary Ellen Hall
Doug and Beth Hammer
Ed Hammond Family
Bill and Wilma Henks
William Richard (Rick) and Linda Henks
Helen Hilliard*
Roy and Emma Jean Tuck Holt
Bryan and Tina Hughes**
Margaret Hurt*
V. Carl Jelley, MD*
Dr. Edward and Connie John
Clifford and Diane Jones
Jerry and Sharon Kasten
Maureen Kennedy
George and Ronna Koepp**
Rick and Pam Kreher
Janet D. Lacey-Hodges
Don and Ruth Landis
George and Rita Langton
Tom and Myrna Mardis**
Forest and Marjorie Martin*
Gale Martin
LaDonna Masters**
Richard R. and Esther G. McCall
Gary and Liz McClure**
Harry and Donna McDaniel
Carol McGraw
Zita McGraw
Homer McWilliams*
The Schneider/Mehrhoff Memorial Fund
Marie Mickelson
Lorene Mitchell*
Marcella Morgan*
John and Judy Ness
Edith M. Nikel*
Wendell and Myrna Olson
Russell and Mabel Pepper
Marjorie Pollard*
Donald A. and Barbara J. Potts
Dick Puhr*
Jeffrey and Marita Ray
Richard Rhodes**
Gary and Glenda Riekhof
J. Brian Russell
Linda Jane Salts**
Harold H., Norma J., and James Allan (Jimmy) Schmidt*
Katherine J. Schrader
Barbara Schuster
Elizabeth A. Scott Charitable Remainder Trust
Clifford M. and Mary Beth Seger
Alvin and Ella Marie Sehrt
Roger T. Sermon*
Dr. Steven Silverstein
Terry and Betty Snapp
Jim and Mary Stilley
Paul Stone, Jr.
Clarence and Betty Stowell
Dan and Shannon Sundberg**
Jane Taylor
Frank Theno
Paul and Marilyn Thomson
Gary Toms
Garland and Pauline Tripp
Montie and Marjorie Tripp
Fern Truschke-Stuart
Todd and Nicole Underwood
Charles and Elizabeth Unger
Michael and Mary Jo Watkins**
Elizabeth C. Weekley-Sutton*
Lysle and Carolyn Weeks**
Brenda West
Thomas L. Winslow*
Debra S. Wood
Scott and Linda Wright
David and Shirley Wurth

Becoming a Legacy Society Member this year is simple. Contact your Community Foundation staff today and share your plans to include your fund (or establish your fund) through a beneficiary designation, will, trust, life insurance policy, charitable gift annuity or other planned gift. You will be invited to join the Heartland Legacy Society.

*Matured gifts  **Denotes new members to our Legacy Society in 2016
Each year, recipients of community grants are recognized at a special luncheon during National Community Foundation Week in November. This past year, 53 grants were awarded totaling $294,034.

2016 COMMUNITY GRANTS ARE AWARDED ON BEHALF OF THE FOLLOWING CHARITABLE FUNDS AT TRUMAN HEARTLAND COMMUNITY FOUNDATION:

Dorothy D. Bay Endowment **
HMF Beaudoin Family Foundation
Big Piney Church Endowment
J.D. Browning Endowment **
Beverly A. Cathcard Charitable Endowment **
Duvall Family Foundation for Children
Samuel W. Edmunds Charitable Fund
Family Literacy Center Endowment
Linda and Mike Gerding Family Fund
Doug and Helen Hatridge Family Foundation
Heartland Arts Alliance Endowment
Margaret Hurt Endowment**
Independence Regional Health Center Community Services Endowment
Jelley Family Foundation Endowment for Children’s Education **
Cliff and Diane Jones Foundation
Junior Service League of Independence
KC Metro Men’s Chorus Fund
L.D. Koirtyohann Family Fund
Dave and Connie Mayta Charitable Fund
Marcella Morgan Oncology Fund**
Homer McWilliams Oncology Fund **
Marjorie Pollard Hospice Endowment **
Prevost Family Foundation
THCF Health Endowment
THCF Unrestricted Endowment
Montie and Marjorie Tripp Family Foundation
Youth Advisory Council Endowment

**Legacy Society Endowments
## Generous Giving
For the Most Good

<table>
<thead>
<tr>
<th>Grants Requested</th>
<th>Total Dollar Amount of Grant Requests:</th>
</tr>
</thead>
<tbody>
<tr>
<td>112 Grant Requests</td>
<td>$915,079</td>
</tr>
</tbody>
</table>

### Health & Welfare
- 26 Awards Totaling: $127,776
- Total Dollars Made Available by Legacy Gifts: $181,589

### Arts & Culture
- 5 Awards Totaling: $21,300
- Total Dollars Made Available by Possible by Current Donor Advised Fund Holders: $38,890

### Education
- 19 Awards Totaling: $137,508

### Community Betterment
- 3 Awards Totaling: $7,450

### Total
- 53 Total Number of Grant Rewards
- $294,034 Total Dollar Amount of Grant Rewards
ANGEL FLIGHT CENTRAL
Give Hope Wings - $5,600
Partial funding provided by the Junior Service League of Independence.

ARTS & AGEING KC
Seven Stages, Seven Stories - $3,500
Partial funding provided by the HMF Beaudoin Family Foundation.

BLUE SPRINGS DOWNTOWN ALIVE!
Little Free Libraries at the Elementary Schools - $2,800

BLUE SPRINGS FAMILY YMCA
Challenger swim lessons - $3,000
Partial funding provided by the Junior Service League of Independence.

CANCER ACTION
Nutritional Supplement Program - $4,500
Partial funding provided by the KC Metro Men’s Chorus.

CHILD ABUSE PREVENTION ASSOCIATION (CAPA)
Family Support Services - $5,000
Partial funding provided by the Duvall Family Foundation for Children and the KC Metro Men’s Chorus.

COLDWATER OF LEE’S SUMMIT
Coldwater No Hungry Kids! Preschool Backpacks - $4,400

COMMUNITY SERVICES LEAGUE
Financial Opportunity Center - $11,000
Partial funding provided by the HMF Beaudoin Family Foundation and the Doug and Helen Hatridge Family Foundation.

DEVELOPING POTENTIAL
Increase Access to Services - $3,000

DRUMM FARM CENTER FOR CHILDREN
Drumm Educational Support Program - $20,000

FRIENDS OF RICE-TREMONTI HOME ASSOCIATION
Interior repairs - $4,000
Partial funding provided by the Dave and Connie Mayta Charitable Fund and the Prevost Family Foundation.

GILLIS CENTER
The Gillis Elementary Classroom Human Energy Project - $1,000

HARRY S. TRUMAN LIBRARY INSTITUTE
Total Truman Access - White House Decision Center - $2,500
Partial funding provided by the Samuel W. Edmunds Charitable Fund.

HARVESTERS
Harvesters’ Senior Feeding Initiative in Suburban Jackson County - $5,000
Partial funding provided by the Montie and Marjorie Tripp Family Foundation and the Samuel W. Edmunds Charitable Fund.
HEARTLAND OUTREACH PROVIDERS
Mobile Dentistry for Eastern Jackson County - $5,000
Partial funding provided by the KC Metro Men’s Chorus and the Youth Advisory Council.

HILLCREST TRANSITIONAL HOUSING – EJC
Transitional Housing for the Homeless - Demonstration Kitchen - $10,000

HOPE HOUSE
Children’s Therapy Project - $6,000
Partial funding provided by the Dave and Connie Mayta Charitable Fund.

JACKSON COUNTY COURT APPOINTED SPECIAL ADVOCATES (CASA)
Transition Program for Older Foster Youth - $5,000
Partial funding provided by the Duvall Family Foundation for Children.

JACKSON COUNTY HEALTH DEPARTMENT
Baby & Me - Tobacco Free - $2,932.66
Partial funding provided by the Youth Advisory Council.

JEWSH FAMILY SERVICES
Help@Home Membership Subsidies - $3,300
Partial funding provided by the KC Metro Men’s Chorus and the Cliff and Diane Jones Foundation.

JUNIOR ACHIEVEMENT OF MIDDLE AMERICA
Start With the End in Mind (SWEM) - $22,358

JUNIOR ACHIEVEMENT OF MIDDLE AMERICA
Bringing Business Back to the Classroom - $5,000
Partial funding provided by the Samuel W. Edmunds Charitable Fund.

KANSAS CITY HOSPICE
Medical Equipment to serve patients in Suburban Jackson County - $5,000

KANSAS CITY SYMPHONY
2017 KinderKonzerts - $5,000
Partial funding provided by the HMF Beaudoin Family Foundation.

KANSAS CITY UNIVERSITY OF MEDICINE & BIOSCIENCES
Score 1 for Health - $10,000
Partial funding provided by the Junior Service League of Independence and the Prevost Family Foundation.

KAUFFMAN CENTER FOR THE PERFORMING ARTS
Open Doors Transportation Fund - $2,300
Partial funding provided by the Cliff and Diane Jones Foundation.

LEE’S SUMMIT SYMPHONY ORCHESTRA
Community Outreach Program - $7,000

LEE’S SUMMIT UNDERWATER RECOVERY
Underwater Rescue and Recovery Regulator Replacement - $8,750

MARIAN HOPE CENTER FOR CHILDREN’S THERAPY
Marian Hope Service Resources - $8,000
Partial funding provided by the KC Metro Men’s Chorus, the HMF Beaudoin Family Foundation, the L.D. Koirtyohann Family Fund and the Youth Advisory Council.

MARILLAC
Expressive Therapies for Marillac Blue Springs Day Treatment School - $1,150
“I want my children and grandchildren to be committed to this community. Through our family foundation, I ensure that my future generations will carry on our charitable legacy in this community.”
<table>
<thead>
<tr>
<th><strong>METROPOLITAN COMMUNITY COLLEGES FOUNDATION</strong></th>
<th>RAYTOWN EMERGENCY ASSISTANCE PROGRAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016 MCC Longview Literary Festival - $1,500</td>
<td>Birds &amp; Baskets 2016 - $2,463</td>
</tr>
<tr>
<td>METROPOLITAN ORGANIZATION TO COUNTER SEXUAL ASSAULT</td>
<td>Partial funding provided by the Junior Service League of Independence.</td>
</tr>
<tr>
<td>Project Aware: Child Sexual Abuse Prevention and Education - $4,000</td>
<td></td>
</tr>
<tr>
<td>Funding provided by the Junior Service League of Independence.</td>
<td></td>
</tr>
<tr>
<td><strong>MISSOURI COLLEGE ADVISING CORPS</strong></td>
<td>REDISCOVER</td>
</tr>
<tr>
<td>Connecting the Dots: Summer Support to Help Suburban Jackson County Students’ Goals of College Become a Reality. - $15,000</td>
<td>Health Care Home for Kids - $5,000</td>
</tr>
<tr>
<td></td>
<td>Partial funding provided by the KC Metro Men’s Chorus and the Samuel W. Edmunds Charitable Fund.</td>
</tr>
<tr>
<td><strong>MUSIC-ARTS INSTITUTE</strong></td>
<td><strong>SHEPHERD’S CENTER OF RAYTOWN</strong></td>
</tr>
<tr>
<td>The Young MAIsterSingers - $3,500</td>
<td>Treasury Operations Support - $3,000</td>
</tr>
<tr>
<td>Partial funding provided by the Samuel W. Edmunds Charitable Fund.</td>
<td></td>
</tr>
<tr>
<td><strong>MUSIC-ARTS INSTITUTE</strong></td>
<td><strong>SOUTHEAST ENTERPRISES</strong></td>
</tr>
<tr>
<td>Music/Arts Institute Scholarship Program - $10,000</td>
<td>2016 - 2017 Holiday Light Recycling Drive - $3,600</td>
</tr>
<tr>
<td><strong>NORTHWEST COMMUNITIES DEVELOPMENT CORPORATION</strong></td>
<td>Partial funding provided by the KC Metro Men’s Chorus and the Linda and Mike Gerding Family Fund.</td>
</tr>
<tr>
<td>Transportation - $3,000</td>
<td></td>
</tr>
<tr>
<td>Partial funding provided by the KC Metro Men’s Chorus.</td>
<td></td>
</tr>
<tr>
<td><strong>PLAY TO LEARN MINISTRIES</strong></td>
<td></td>
</tr>
<tr>
<td>Play to Learn Preschool - Roots and Wings Program - $3,800</td>
<td></td>
</tr>
<tr>
<td>Partial funding provided by the KC Metro Men’s Chorus and the Cliff and Diane Jones Foundation.</td>
<td></td>
</tr>
<tr>
<td><strong>POWERHOUSE THEATRE FOUNDATION</strong></td>
<td><strong>THE FAMILY CONSERVANCY</strong></td>
</tr>
<tr>
<td>Enchanted Forest - $3,000</td>
<td>Student Assistance Program - $5,000</td>
</tr>
<tr>
<td>Partial funding provided by the Dave and Connie Mayta Charitable fund.</td>
<td>Partial funding provided by the KC Metro Men’s Chorus, the HMF Beaudoin Family Foundation and the Youth Advisory Council.</td>
</tr>
<tr>
<td><strong>POWELL GARDENS</strong></td>
<td><strong>THE SUMMIT CHURCH (LEE’S SUMMIT UNITED METHODIST CHURCH)</strong></td>
</tr>
<tr>
<td>Good To Grow - $10,000</td>
<td>The Summit Lunch Program - $5,000</td>
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<td></td>
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</tr>
<tr>
<td><strong>POWERHOUSE THEATRE FOUNDATION</strong></td>
<td><strong>TNC COMMUNITY</strong></td>
</tr>
<tr>
<td>Enchanted Forest - $3,000</td>
<td>Community Integration - $2,500</td>
</tr>
<tr>
<td>Partial funding provided by the Dave and Connie Mayta Charitable fund.</td>
<td></td>
</tr>
<tr>
<td><strong>RACHEL HOUSE</strong></td>
<td><strong>UNIVERSITY OF MISSOURI - JACKSON COUNTY EXTENSION</strong></td>
</tr>
<tr>
<td>Client Service Paperless Project - $1,280</td>
<td>Independence Robotics 4-H Afterschool - $13,000</td>
</tr>
<tr>
<td>Partial funding provided by the KC Metro Men’s Chorus.</td>
<td></td>
</tr>
<tr>
<td><strong>RAINBOW CENTER FOR COMMUNICATIVE DISORDERS</strong></td>
<td><strong>UPLIFT INDEPENDENCE</strong></td>
</tr>
<tr>
<td>How Does Our Garden Grow - $5,000</td>
<td>Neighborhood Dinner - $1,500</td>
</tr>
<tr>
<td>Partial funding provided by the Youth Advisory Council.</td>
<td>Funding provided by the Junior Service League of Independence.</td>
</tr>
<tr>
<td><strong>RAYTOWN ARTS COUNCIL</strong></td>
<td></td>
</tr>
<tr>
<td>Raytown Community Band Instrument and Equipment Improvement Project - $2,850</td>
<td></td>
</tr>
<tr>
<td>Partial funding provided by the Linda and Mike Gerding Family Fund.</td>
<td></td>
</tr>
</tbody>
</table>
THCF sets the standard for philanthropy by connecting donors to causes important to them that, in turn, serve unfulfilled needs in our communities. The following more than 600 funds were created to help many accomplish their goals, granting $3,350,339 in 2016.

**LEADING THE WAY FOR CHARITABLE GIVING IN OUR COMMUNITIES**

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**DESIGNATED FUNDS**

<table>
<thead>
<tr>
<th>Arabia Museum Foundation Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td>Association of Fundraising Professionals Mid-America Chapter Operating Fund</td>
</tr>
<tr>
<td>Bates County Historical Society Acorn Endowment Fund</td>
</tr>
<tr>
<td>Bingham-Waggoner Historical Society Fund</td>
</tr>
<tr>
<td>Blue Springs City Theatre Foundation Fund</td>
</tr>
<tr>
<td>Blue Springs Historical Society, Inc. Fund</td>
</tr>
<tr>
<td>Blue Springs South Athletics Fund</td>
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<tr>
<td>Boys and Girls Clubs Fund</td>
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<tr>
<td>Donna G. Bullock Family Fund</td>
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<tr>
<td>Tom Cairns Endowment Fund</td>
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<tr>
<td>Cancer Action Fund</td>
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<td>Cass County Historical Society</td>
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<tr>
<td>Cass County Genealogical Society Endowment</td>
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<tr>
<td>Cass County Historical Society Quasi-Endowment</td>
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<td>Irene Pippit Trust Fund</td>
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<td>Beverly A. Cathcard Donor-Advised Endowment</td>
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<td>Earl Kenneth Cavanah Donor Advised Endowment Fund</td>
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<td>Center for North American Herpetology (CNAH)</td>
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<tr>
<td>The Suzanne L. and Joseph T. Collins Fund</td>
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<tr>
<td>Operating Reserve Fund</td>
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<tr>
<td>Center For Conflict Resolution</td>
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<tr>
<td>Center for Conflict Resolution Endowment</td>
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<tr>
<td>Center for Conflict Resolution Short Term Investment Fund</td>
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<tr>
<td>Center Place Educational Foundation General Fund</td>
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<td>Child Abuse Prevention Association General Endowment Fund</td>
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<td>Citizens for the Archives Fund</td>
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City of Blue Springs
  Vesper Hall General Fund
  Vesper Hall Nutrition & Homebound Fund
City of Independence
  Animal Shelter Replacement Fund
  Fire Safety Equipment Fund
  Friends of Truman Depot Endowment
  Friends of Parks & Recreation
  George Owens Nature Park
  Palmer Center Senior Services Enhancement Fund
  Palmer Senior Center Endowment
  McCoy Park All Inclusive Play Project Fund
  Pioneer Woman Statue Endowment
  Police Equipment Enhancement & Improvement Fund
  Sermon Memorial Room Endowment
  Sermon/Old Spring Project Endowment
  Sister City Fund
  Truman Memorial Building Restoration Fund
  Truman Memorial Walking Trail Fund
  Waggoner Memorial Endowment Fund
  George H. Collings Memorial Endowment for Palmer Center
Community of the Good Shepherd (dba Alternative Opportunities, Inc.)
  Adolf Heine Memorial Fund
  Community of the Good Shepherd Operating Reserve Fund
  Community of the Good Shepherd Fund
Community Services League
  Emergency Assistance Fund
  Endowment Fund
  Michelle A. Schumacher Memorial Fund
  Non-Endowment Fund
Comprehensive Mental Health Services
  Client Services Fund
  Foundation, Inc. Fund
Cultural Arts Coalition of Eastern Jackson County
  Operating Reserve
  Operating Money Market Fund
Developing Potential Endowment Fund
Orna D. Dorsch Religious Ministries Endowment Fund
Drumm Farm Center for Children - Educational Enrichment Endowment
Eastern Jackson County Youth Court Fund
Family Conservancy Fund
First Baptist Church of Independence
  Endowment Fund
  Myrtle Mingle Music Fund
  Non-Endowed Fund
First Presbyterian Church of Lee’s Summit
  Ebenezer Fund
  Endowment Fund
  Information Technology Fund
  Reserve Fund
Gift of Life
  Non-Endowed Fund
  Quasi Endowed Fund
Graceland University Fund
Grain Valley School District Foundation
  A Plus Fund
  Athletics Fund
  Classroom Technology Fund
  General Fund
  Instrumental Music Fund
  Library Resources Fund
  Outdoor Classroom Fund
  Robotics Program Fund
Harrisonville Parks and Recreation Foundation
HealthEd Connect Fund
Heart of America Chorus
  Endowment Fund
  The KC Chapter of SPEBSQSA, Inc. Fund
Heart of America Council, BSA/Blue Elk Endowment Fund
Heritage Philharmonic Endowment Fund
Hillcrest Ministries of Eastern Jackson County
  Endowment Fund
  Hillcrest Ministries Fund
Historical Society of Lee’s Summit
Hope House
  Anonymous Endowment Fund
  Endowment Fund
  M. E. Hurt Endowment Fund
  Shaunda L. Thomas Foundation
Independence Youth Court Fund
Interactive African Missions Fund
Jackson County 4-H Foundation
  Money Mkt #2 Fund
  Fixed Income Fund
  Equities Fund
Jackson County Columbian Home Association
Jackson County Free Health Clinic Fund
Jackson County Historical Society
   Archives Fund
   Bess Hatten Raymond Fund
   Endowment Fund
   Operating Non-Endowment
   Roger T. Sermon Endowment
JobOne Investment Fund
Junior Service League of Independence
   Administrative Savings Fund
   Community Trust Savings Fund
   Frances Hink Endowment Fund
   Marjorie N. Martin Endowment Fund
   Memorial Fund
Kansas City Chorale Fund
Kansas City Fire Museum Fund
Kansas City Hospice
   Endowment Fund
   Kansas City Hospice Fund
K & M Karcher-Lumsden Charitable Fund
KC Metro Mens Chorus
Lee’s Summit CARES Endowment Fund
Lee’s Summit Christian Church
Lee’s Summit Optimist Foundation Fund
Lee’s Summit Parks & Recreation
   Angel Fund
   Gamber Center Fund
   Lee’s Summit Parks & Recreation Fund
Lee’s Summit Social Services Fund
Lee’s Summit Symphony Orchestra
   Endowment Fund
   Non-Endowment Fund
Lee’s Summit Underwater Rescue & Recovery Fund
Dr. Curtis and Mrs. Ann Long Fund for the Bates County Fair
Mid America Library Alliance (MALA) Long-term Investment Fund
Meals on Wheels
   Operating Reserve Fund
   Endowment Fund
Mental Health Association of the Heartland Fund
Messiah Lutheran Church
   Endowment Fund
   Ruth Riggs Memorial Scholarship Fund
Sabol Fund
Trust Fund
Metropolitan Community Colleges’ Indep. Development Fund
Mid-Continent Public Library
   Midwest Genealogy Center Capital Fund
   Midwest Genealogy Center Program Fund
   Summer Reading Endowment Fund
   General Fund
   Story Center Fund
   James A. Leathers Scholarship - Library Supplement Fund
Midwest Hemophilia Association Fund
Missouri Baptist Children’s Home Children and Family Ministries Endowment Fund
Mitchell Foundation
MO Park & Recreation Association
   Beaver Estate Fund
   Education Fund
   Lyle B. Beaver Leadership Development Institute Endowment Fund
   Maintenance Fund
   Operating Reserve Fund
Mother’s Refuge
   Endowment Fund
   Operating Reserve Fund
National Kidney Foundation of Kansas and Missouri Fund
Nutra-Net Endowment Fund
Oak Grove School District Education Foundation
Park University Endowment Fund
Cathy Paulson Hope House Memorial Fund
PAWS Neuter/Spay Endowment Fund
   John F. Tweedie Memorial & Virginia Koso Trust
Power House Theatre Foundation Fund
Puppetry Arts Institute
   Capacity Building Fund
   Endowment Fund
   Museum Fund
Rainbow Center
   Endowment Fund
   Rainbow Center Fund
Raymore Baseball Softball Improvement Fund
Raymore Parks and Recreation Fund
Raymore-Peculiar Public School Foundation Fund
Raytown Community Foundation
   350 Highway Corridor Plan
   Raytown Tree Fund
Raytown Educational Foundation
   Raytown Educational Foundation Fund
   Short Term Repository Fund
Raytown Emergency Assistance Program (R.E.A.P.) Fund
Raytown Historical Society Foundation Endowment
Saint Paul United Methodist Church
  Amerine Memorial Endowment Fund
  E. Jones Memorial Endowment Fund
  Hurt Memorial Endowment Fund
  Lubben Memorial Endowment Fund
  Mader Memorial Endowment Fund
  Richardson Memorial Endowment Fund
Santa Fe Trail Neighborhood CDC
  Non-Endowed Fund
  Short-term Investment Fund
Edna M. Scahill Endowment Fund
School of Economics
  Blue Springs School of Economics Fund
  Money Market Fund
Roger T. Sermon - Youth Art Show Fund
Society for Study of Amphibians and Reptiles
  Bailey Endowment Fund
  Conant Endowment Fund
  Contribution Reserve
  Dean Metter Memorial Award Endow Fund
  General Operating Reserve Fund
  Gordon Endowment Fund
  Hutchison Endowment Fund
  Life Member Fund
  Liner Endowment Fund
  Margarita Metallinou Endowment
  Minton Endowment
  Roger Conant Grants (GIH) Res Endow Fund
  Seibert Award Endowment Fund
  Special Publication Reserve Fund
The Spirit of Independence Community Band Fund
Sugar Creek - Friends of the Parks Fund
Summit Christian Academy
Sustainable Hope International
Harry S. Truman Library Institute Fund
THCF Civic Leadership Fund
THCF Operating Endowment Fund
Truman Heritage Habitat for Humanity
  Friends of Truman Heritage Habitat for Humanity
  Operating Reserve Fund
  Endowment Fund
Tabitha’s Closet Fund
William M. and Martha L. Thomas Fund
Jeffrey Tognascioli Memorial Fund
Truman Medical Center-Lakewood NICU Fund
Vaile Victorian Society
  Endowment Fund
  Reserve Fund
# Field of Interest Funds

If your interests lie in education, faith, health or the arts, you can support service-providing causes like these through THCF.

<table>
<thead>
<tr>
<th>Fund Name</th>
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</thead>
<tbody>
<tr>
<td>Blue Springs Jaycees Breaking New Ground Fund</td>
<td>Lee's Summit Missouri Municipal Building Authority, Inc.</td>
</tr>
<tr>
<td>Blue Springs Parents Club</td>
<td>Legacy Foundation Fund</td>
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<tr>
<td>James D. Browning Endowment Fund</td>
<td>Lions Eye Fund</td>
</tr>
<tr>
<td>Bryant School and Neighborhood Playground Fund</td>
<td>Gary Martinette Award</td>
</tr>
<tr>
<td>Dr. Michael J. Bubalo Memorial Fund</td>
<td>Mayor's Prayer Breakfast Fund</td>
</tr>
<tr>
<td>Charitable Reinvestment Foundation Fund</td>
<td>Missouri Table &amp; Chair Charitable Fund</td>
</tr>
<tr>
<td>Clean Air Don A. Potts Award Fund</td>
<td>Open Arms Foundation Fund</td>
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<tr>
<td>Discover ED Foundation Fund</td>
<td>Professional Development Network Fund</td>
</tr>
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<td>Noel &amp; Carolyn Fulkerson Student Benefit Fund</td>
<td>Progress Independence Fund</td>
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<tr>
<td>Grandma's Alzheimer Fund</td>
<td>Dick Puhr Fund for Athletes</td>
</tr>
<tr>
<td>Darrell Hein Memorial Eagle Scout Project</td>
<td>Revolving Rehabilitation Loan Fund</td>
</tr>
<tr>
<td>Ian’s Fund for Testicular Cancer Awareness</td>
<td>Rolfe Bridge Education Fund</td>
</tr>
<tr>
<td>Independence Rotary Carnival Fund</td>
<td>Third World Sewing Partnership Fund</td>
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<tr>
<td>Melvin Jones Eye Fund</td>
<td>United Nations Peace Memorial Fund</td>
</tr>
<tr>
<td>Kansas City Theater Foundation</td>
<td>Uplift Independence</td>
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<tr>
<td>KCMPRDA Fund</td>
<td>Veterans Way Memorial Fund</td>
</tr>
<tr>
<td>Lee's Summit Kiwanis Club Fund</td>
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</table>

# Endowment Funds

If you leave an unrestricted or field of interest gift to THCF, your dollars will serve areas of greatest need in your name for years to come.

<table>
<thead>
<tr>
<th>Fund Name</th>
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</thead>
<tbody>
<tr>
<td>Dorothy D. Bay Donor Advised Fund</td>
<td>Marcella Morgan Oncology Fund</td>
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<tr>
<td>Big Piney Fund for Social Ministry</td>
<td>Marjorie Pollard Hospice Fund</td>
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<tr>
<td>Beverly A. Cathcard Charitable Endowment Fund</td>
<td>Truman Heartland Community Foundation</td>
</tr>
<tr>
<td>Family Literacy Endowment Fund</td>
<td>THCF CEO Discretionary Grantmaking Fund</td>
</tr>
<tr>
<td>Heartland Arts Alliance Fund</td>
<td>THCF Community Grantmaking Fund</td>
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<tr>
<td>Margaret E. Hurt Endowment Fund</td>
<td>THCF Endowment Fund</td>
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<tr>
<td>IRHC Community Service Fund</td>
<td>THCF Health-related Project Fund</td>
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<td>Jelley Family Foundation Fund</td>
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<tr>
<td>Homer McWilliams Oncology Fund</td>
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</tbody>
</table>
“By partnering with THCF, I am able to see our giving grow monthly on our fund statements. I love being able to look at our giving journey onscreen and be proud of the progress we have made.” - Sandy Greco
**DONOR ADVISED FUNDS**

Like your own personal foundation, a donor advised fund lets you establish a plan for your individual favorite charities or causes.

Aslakson Family Foundation  
Carol S. Baker Charitable Fund  
HMF Beaudoin Family Foundation  
Beem Snapp Family Foundation  
C. Glenn & Ada M. Betts Family Fund  
T. Eugene Bileski Foundation  
Larry and Susan Blick Family Fund  
Brighter Tomorrows Fund  
Broome Family Fund  
C. Robert Buckley Family Fund  
Butler Family Foundation Fund  
Gene and Joanne Cable Donor-Advised Fund  
Cargo For Kids  
Cavanah Family Fund  
Centerpoint Medical Staff Community Grants Fund  
Marcella Clark Charitable Fund  
Roberta Coker Charitable Fund  
Byron Constance Fund  
Larry and Wanda Cook Family Charitable Fund  
Brad and Sandy Cox Family Foundation Fund  
Karen Cox Family Fund  
Cunningham/Weeks Advisory Fund  
Catherine J. A. Curtis Family Fund  
D and S VP Charitable Fund  
Gayle Frances Davidson Memorial Fund  
Richard Digby Memorial Fund  
Tony DiPardo Foundation of Music  
Donahue Family Foundation Fund  
Sam and Vera Doutt Charitable Fund  
Duvall Family Foundation for Children  
Samuel W. Edmunds Charitable Fund  
Elias Family Charitable Fund  
Bill and Jill Esry Family Foundation Fund  
Farrington Family Fund  
Ferguson Family Foundation  
John and Jeanie Ferguson Foundation  
Finke Family Foundation Fund  
Wendy Fitzgerel-Blue Foundation Fund  
Forrester Family Fund  
The Foudree Family Donor-Advised Fund  
Kenneth L. and Eleanor R. Frasier Charitable Fund  
Frederick Foundation Fund  
Helen L. French Family Fund  
Noel and Carolyn Fulkerson Foundation Fund  
David and Jeanne Geiman Fund  
Linda and Mike Gerdinger Family Fund  
Greco Family Foundation Fund  
Fred and Marge Hahn Family Fund  
Harold and Mary Ellen Hall Donor Advised Fund  
Hammer Family Fund  
Hampton Family Fund  
Nancy and Phil Hanson Family Foundation Fund  
The Robert E. & Debra A. Harmon Fund  
Douglas G. and Helen Ann Hatridge Family Foundation Fund  
Dr. Herman Hausheer Family Fund  
Heggestad Family Fund  
Gloria L. Helmer Charitable Fund  
Henks Financial Group Charitable Fund  
Rick & Linda Henks Donor Advised Fund  
Robert and Mary Hepting Foundation  
Higgins Family Fund  
Alan and Connie Hill Charitable Fund  
Mike & Joy Hobick/CARSTAR Foundation  
Myrtle Hoffman & CS Monnier Memorial Fund  
Roy David Holt and Emma Jean Tuck Holt Charitable Fund  
Ken and Melanie Horrell Charitable Fund  
Hurt Family Endowment Fund  
I Love My Independence Fund  
I Love My Valley Fund  
Independence Young Matrons Endowment Fund  
David and Lydia Jeter Family Fund  
Clifford and Diane Jones Foundation  
K & M Karcher-Lumsden Charitable Remainder Trust Donor Advised Fund  
Michael T. and Jacci Kelly Family Foundation  
Maureen A. Kennedy Giving Fund  
Kimak Family Fund  
King Family Fund  
L.D. Koirtyohann Family Fund  
Richard and Pamela Kreher Family Fund  
Janet D. Lacey-Hodges Charitable Fund  
Randolph & Karen Lantz Family Foundation  
Longberg Family Donor Advised Fund
Lucky Penny Charitable Fund
Magady Family Education Fund
Michael Martin Family Fund
David and Connie Mayta Charitable Fund
McCandless/Taylor Fund
McClure Family Fund
Mike and Jan McGraw Family Foundation Fund
Bruce and Tracey Mershon Family Foundation Fund
Michael and Linda Meyers Family Foundation
Frank and Marie Mickelson Fund
Millay Family Foundation
Mitzvah Fund
Melanie Moentmann Charitable Fund
Ray Morton Foundation
John & Judith Ness Fund
Evan Noll Memorial Fund
Office Products Alliance Charitable Fund
Pogson Family Foundation Fund
Dr. Donald and Barbara Potts Fund
Prevost Family Foundation
Pryde Family Foundation Fund
Quibell Family Foundation Acorn Fund
Joan and Max Raveill Charitable Fund
William H. & Marcile K. Reich Family Fund
Rohs Family Foundation
Rooker Family Giving Fund
Rotary Club of Independence
  Community Grants Fund
  William D. Palmer Endowment Fund
Rotary Club of East Independence
  Community Grants Fund
  Special Grants Fund
Ed & Sue Russell Family Foundation Fund
J. Brian Russell Donor Advised Fund
Richard Edward Sanderson Foundation
Harold H., Norma J. & James Allan (Jimmy) Schmidt Charitable Fund
Schondelmeyer-Williams Fund
Kenneth and Susan Scott Family Foundation
Sharing for Shannon Memorial
Charles and Brenda Shields Family Foundation
Smith Family Fund
Dennis D. and Deborah K. Smith Family Foundation Fund
Jim and Mary Stilley Family Charitable Trust
Norman and Darleen Swails Fund
Dennis and Jane Taylor Fund
Mitchell & Betsy Taylor Family Fund
Tim and Yvette Taylor Fund
Cathy Tharp Family Fund
Frank Theno Charitable Foundation
Thompson Family Charitable Foundation
Paul and Marilyn Thomson Family Fund
Garland and Pauline Tripp Foundation
Montie and Marjorie Tripp Family Foundation Fund
Billy Truschke Memorial Fund
Todd & Nicole Underwood Family Ministry
Charles & Elizabeth Unger Family Foundation
Unilever Charitable Fund
Daniel E. and Alice D. Waite Family Foundation Fund
Brenda Rapp West Foundation
Bob and Candy White Foundation
Frank P. and Bernelle White Memorial Donor-Advised Fund
Widick and Appleberry Family Fund
John and Sharon Williams Family Fund
Debra Sue Wood Charitable Foundation Fund
Wright Family Donor Advised Fund
Jason and Angela Wright Fund
Dave & Shirley Wurth Family Foundation
Lenora “Lennie” Wyre Charitable Fund
**DEFERRED ENDOWMENT FUNDS**

usually created with an estate gift, deferred funds allow you to leave a legacy of giving to your charitable interests beyond your lifetime.

<table>
<thead>
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<th>Fund Name</th>
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<tr>
<td>All Creatures Fund</td>
<td>George &amp; Rita Langton Foundation</td>
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<tr>
<td>Anderson Family Foundation Fund</td>
<td>Leland “Tom” and Myrna Mardis Foundation</td>
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<tr>
<td>L. Joseph Arth Donor Advised Fund</td>
<td>Leland Thomas Mardis and Myrna Lee Mardis Gift Annuity</td>
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<tr>
<td>Jerry and Doreen Benton Family Foundation</td>
<td>Donna Masters Charitable Fund</td>
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<tr>
<td>Joe and Janice Blackburn Family Charitable Fund</td>
<td>Richard and Esther McCall Donor Advised Fund</td>
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<td>Carol J. Carpenter Bequest</td>
<td>Richard R. and Esther G. McCall Charitable Remainder Trust</td>
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<tr>
<td>James W. and Stephanie D. Chipman Charitable Fund</td>
<td>Zita McGraw Charitable Endowment Fund</td>
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<tr>
<td>Phyllis D. Combest Charitable Remainder Trust</td>
<td>Russell and Mabel Pepper Family Foundation Fund</td>
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<td>J.D. and Jeanne Cooper Foundation</td>
<td>Potts-Martin Fund</td>
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<tr>
<td>Mahlon Dale and Rose Anne Crown Charitable Gift Annuity</td>
<td>Jeff and Marita Ray Foundation</td>
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<tr>
<td>Missy Curry Foundation</td>
<td>Richard Rhodes Fund for the Lexington Community</td>
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<tr>
<td>Marvin and Dixie Droegle Charitable Fund</td>
<td>Gary and Glenda Riekhof Family Foundation</td>
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<tr>
<td>Raymond C. and Judy Ebert Donor Advised Fund</td>
<td>Donald S. Ross Charitable Gift Annuity Fund</td>
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<tr>
<td>Carol Floyd Foundation</td>
<td>Schneider/Mehrhoff Memorial Fund</td>
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<td>Robert R. Franke Donor Advised Fund</td>
<td>Phil and Maxine Schoggen Charitable Gift Annuity</td>
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<td>Helen French Charitable Gift Annuity Funds</td>
<td>Barbara A. Schuster Fund</td>
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<td>Elizabeth Scott Charitable Remainder Trust</td>
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<tr>
<td>Ed and Sharon Hammond Family Charitable Fund</td>
<td>Joseph T. Sefcik Charitable Gift Annuity</td>
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<tr>
<td>Betty L. Harryman Charitable Gift Annuity</td>
<td>Clifford M. and Mary Beth Seger Charitable Gift Annuity</td>
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<td>William R. Hartong &amp; E. Elaine Hartong Charitable Remainder Trust</td>
<td>Alvin and Ella Marie Sehrt Fund</td>
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<tr>
<td>Rosalie M. Headley Charitable Remainder Trust</td>
<td>Clarence and Betty Stowell Gift Annuity Fund</td>
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<td>William &amp; Wilma Henks Family Foundation Fund</td>
<td>Dan and Shannon Sundberg Family Foundation Fund</td>
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<tr>
<td>Jack B. Hoke Charitable Remainder Unitrust</td>
<td>Dennis and Jane Taylor Gift Annuity</td>
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<td>Robert A. Hoke Charitable Remainder Unitrust</td>
<td>Gary R. Toms History &amp; Genealogy Education Fund</td>
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<td>Ruby N. Hoke Charitable Remainder Unitrust</td>
<td>Gary R. Toms History Scholarship Fund</td>
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<td>Wanda Ruth Hoke Charitable Remainder Unitrust</td>
<td>Gary and Nita Tripp Foundation</td>
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<td>Dr. Edward and Connie John Donor Advised Fund</td>
<td>Elizabeth E. “Pat” Wasmuth Charitable Gift Annuity</td>
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<td>Jerry and Sharon Kasten Family Foundation Fund</td>
<td>Watkins Family Foundation</td>
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<tr>
<td>Koepp Family Fund</td>
<td>Thomas L. Winslow Endowment</td>
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<tr>
<td>Donald E. Landis Charitable Remainder Unitrust</td>
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</tr>
</tbody>
</table>
“Everyone has an obligation to give back, whether that be through providing wisdom, volunteering or with your finances. You have to assess where your talent is and give back in that area.” - Chris Payne
SCHOLARSHIPS

$234,582
AWARDED IN SCHOLARSHIPS IN 2016

FUNDS THAT MAKE CHILDHOOD DREAMS REALITY

A SCHOLARSHIP IS AN EASY AND EFFECTIVE WAY TO GIVE BACK TO THE COMMUNITY, HONOR THE MEMORY OF A LOVED ONE OR ENGAGE YOUR CORPORATION IN GIVING.
$234,582 AWARDED IN SCHOLARSHIPS IN 2016

SCHOLARSHIPS
APPLICATIONS RECEIVED FROM
312 STUDENTS

SCHOLARSHIP AWARDS
184 STUDENTS RECEIVED

SCHOLARSHIP FUNDS
80 SCHOLARSHIP FUNDS

REVIEWERS
161 REVIEWERS

MORE THAN $3.1 MILLION AWARDED IN 33 YEARS.
SCHOLARSHIP FUNDS

Corporal Benjamin Ashley Memorial Scholarship
Association for Industrial Development Scholarship
Pat Barnhard Memorial Scholarship
John S. Barrett Memorial Scholarship
Josh Borgmeyer Memorial Scholarship
Brian Borgstadt Memorial Scholarship
John F. Bowser Radiology Scholarship
Steven D. Brown Scholarship
Ron Bruch and Caryl Goodyear Bruch National Teaching Institute Scholarship
Gene and Joanne Cable Scholarship
Centerpoint Medical Staff Scholarship
Centerpoint Medical Center Auxiliary Scholarship Fund
Mel Colley LEAD Scholarship Fund
Opal Barker Day and Phyllis Day Combest Memorial Education Fund
Council of Clubs of Greater Kansas City Scholarship
David A. Cromwell Memorial Scholarship Fund
Senator Ronnie DePasco Scholarship
Glenda K. Dowler Memorial Scholarship
Drexel Public School District Foundation
W.D. Gordon Memorial Scholarship
James H. Phillips Scholarship
Kay and Morris Dunning Nursing Scholarship
Fort Osage Resources Champion Education Scholarship (FORCE)

Dr. Gale T. Bartow Scholarship
Mary Beggs Science Education Scholarship Fund
Arthur Butler Scholarship Vilas “Lee” Compton Memorial Scholarship
Daughters of the American Revolution Scholarship
Louann Dickmeyer Educational Scholarship
Harley & Doris M. Eby Reed Scholarship
Dr. Mark Enderle Scholarship
Dr. Larry Ewing Scholarship
Michael Brandon Fisher Memorial Scholarship
FOSD Employee Scholarship
FOSD Leadership Fund
J. Richard Franklin Scholarship
Ft. Osage Resources Champion Education Fund
Jimmy Golden Memorial Softball Scholarship
Gragg Memorial Scholarship
Dr. Victor D. Gragg Scholarship
Dr. Paul James Scholarship
Robert Keeton Scholarship Fund

A. Joan Lovelace Future Educator Scholarship
Carol Marcks Elementary Education Scholarship
Judy Lee McDaniel-Yazel Scholarship
Melanie Meyer Memorial Scholarship
Dustin Payne Scholarship
Mona Richardson Scholarship
Gus Spencer Scholarship Fund
Connie Truelove Scholarship
John Waldman Memorial Scholarship
Dr. Ben Whited Scholarship
Friends of the Blue Springs Ballet Dance Scholarship Fund
Sara Garrett Memorial Brandon
Gieselman Memorial 4-H/FFA Scholarship Fund
Grain Valley Education Foundation
Top 10% of the Graduating Class
Missouri Scholars Academy Scholarship
Athletic Letter-of-Intent Scholarship
MSHSAA Sportsmanship Award Scholarship
GV Eagle Booster Club Scholarships
Ed McRell Memorial Scholarship
Rachel House Hudson Memorial Scholarship
Brian D. Ostrander Memorial Scholarship
Jerry Mueller Memorial Scholarship
David and Patty Hackett Scholarship
Sni Valley Academy Scholarship Fund
Jean Gillig Scholarship
Greater Kansas City Friends of Family Consumer Science Scholarship
Rachel House Hudson Memorial Scholarship
Independence Young Matrons Scholarship
Chuck & Jeneen Jones Scholarship Fund
Harry & Connie Katowitz Memorial Scholarship
Frank Kobe Scholarship Fund
Thomas Locke Memorial Scholarship sponsored by Eastern Jackson County Bar Association
Julie Elizabeth Marshall Memorial Scholarship Fund
Forrest and Marjorie Martin Scholarship
Elizabeth Hill McClure Scholarship
McMillin Family Foundation Education Scholarship
Medical Alliance-Metropolitan Medical Society of Greater Kansas City Scholarship
Mid-Continent Public Library James A. Leathers Scholarship Fund
Stella and William Moran Memorial Scholarship Fund
Edward and Helen Newlin Scholarship
Georgia B. Northway Hemophilia Scholarship
Oak Grove School District Education Foundation
  Clyde E. Williams Scholarship
  Hershel & Mae Cline Scholarship
  Charles & Alma Pallette Memorial Scholarship
  Krystle Rose Logston Scholarship
  Tripp Family Scholarship
Wendell J. and Myrna J. Olson Student Assistance Scholarship
Sam and Lindsey Porter Scholarship
Raytown Educational Foundation Aspire Scholarship for Raytown Schools
Raytown Rotary Club Scholarship
Eugene J. Rolfe Engineering Scholarship
Kathy Rolfe Bridge Scholarship
Harold H., Norma J. & James Allan (Jimmy) Schmidt Scholarship
Seger Family Nursing Scholarship
Blair Michaela Shanahan Lane Memorial Scholarship Fund
  Brianna Leigh Shelton Scholarship
  Sixth Bomb Group Memorial Scholarship
  Laura G. Stark Memorial Fund
  Jason Stone Creativity Scholarship Award
  Sugar Creek Business and Civic Club Fund
  Bill Summa Scholarship
  THCF Henri E. Goettel Youth in Philanthropy Award
  Toni Thornton AAUW Re-entry Scholarship
  Tile Contractors’ Association of America, Inc. Scholarship Fund
Bess Wallace Truman Scholarship sponsored by Independence Junior Service League
Harry S. Truman Memorial Scholarship
Elizabeth C. Weekley Scholarship
William Chrisman Class of ’53 Scholarship
Phillip Zaroor Entrepreneurial Scholarship
TOAST TO OUR TOWNS GALA

THE MISSOURI MAVERICKS
Heartland Corporate Citizen of the Year

TERRY & BETTY SNAPP
Heartland Humanitarians of the Year

COMMUNITY SERVICE LEAGUE
Heartland Service Award

OUTSTANDING CITIZENS OF THE YEAR

DAVE SMITH
Blue Springs

DARRYL JONES
Grain Valley

DONNA PITTMAN
Independence

RICHARD WILLIAMS
Lake Winnebago

NICK & JENNIFER SWEARNGIN
Lee’s Summit

CHRIS & STACEY PAYNE
Raytown

ROBERT “BOB” BUCKLEY
Sugar Creek

Special thanks to Heartland Citizen Reception Sponsor, CommunityAmerica Credit Union and host Dr. Steven Silverstein.
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- Children’s Mercy Hospitals and Clinics
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- Brad and Lorna Constance
- Corporate Copy Print
- CPros, Inc.
- Datamax KC
- Drumm Farm Center for Children
- Foto’s Office System
- Chuck and Colleen Foudree
- Sue Frank Insurance Agency, Inc.
- Kenneth and Eleanor Frasier
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- Harry S. Truman Library Institute
- Henks Financial Group
- Jackson County
- John and Nancy Kimak
- Lathrop and Gage – Ruth Brackney
- Lead Bank
- Lighthouse Legal
- Lytle Construction
- Martin Tax and Financial Services
- David and Connie Mayta
- Meyer Music
- MCC-Longview
- Machelle Riffe Real Estate
- Steve and Carol Sturm
- Steven C. Krueger Legal Services, LLC
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- Cathy Tharp
- Viracor-IBT
- Wells Fargo Advisors – Mark Foudree
- Brenda West
- Bob and Candy White
- Winbury Group

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- Beth and David Williams

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- Paul and Sandra Moentmann
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- Brenda West

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- Jerry P. Benton
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- Cliff and Diane Jones
- Dr. Bryan Hughes and Tina Parsley Hughes
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- Chief Jim Lynch
- Missouri Mavericks
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- Bryan and Deanna Gash
- Mike and Linda Gerding
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- Robert and Mary Hepting
- Bud and Betty Hertzog
- Harvey and Lois House
- Eric Hughey
- David and Lydia Jeter
- Rebecca Knepper
- Barbara Koirtyohann
- Steven C. Krueger Legal Services, LLC
- Diane Krizek
- Dennis Taylor and Dr. Bridget McCandless
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- R. Dyan Herdzina
- Clay and Vickie Martin
- Bob and Beverly Powell
- Jim and Machelle Riffe
- Dr. Ralph K. and Brenda Ruckman
- Carla Simpson
- Pam Stepp
- Dan and Shannon Sundberg
- Rick Viar and Kim Berwald Viar
- Dr. Cameron Lindsey and Allen West
## 2016 Financial Summary

### Assets

<table>
<thead>
<tr>
<th>Category</th>
<th>Dec. 31, 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cash</strong></td>
<td></td>
</tr>
<tr>
<td>Checking/Sweep Account</td>
<td>266,845</td>
</tr>
<tr>
<td>Petty Cash</td>
<td>1,000</td>
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<tr>
<td><strong>Total Cash</strong></td>
<td><strong>267,845</strong></td>
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<tr>
<td><strong>Investments, at Fair Market Value</strong></td>
<td></td>
</tr>
<tr>
<td>CD-Money Market Portfolio</td>
<td>2,796,520</td>
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<tr>
<td>American Funds Portfolio</td>
<td>1,509,897</td>
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<tr>
<td>Fixed Income Investment Portfolio</td>
<td>7,745,817</td>
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<tr>
<td>Equity Investment Portfolio</td>
<td>14,351,506</td>
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<tr>
<td>Charitable Remainder Trust Portfolio</td>
<td>2,903,947</td>
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<tr>
<td>Investments - Segregated</td>
<td>6,451,665</td>
</tr>
<tr>
<td><strong>Total Investments</strong></td>
<td><strong>35,759,352</strong></td>
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<tr>
<td><strong>Other Assets</strong></td>
<td></td>
</tr>
<tr>
<td>Prepaid Expense</td>
<td>9,503</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>2,392</td>
</tr>
<tr>
<td>Charitable Lead Trust - Beneficial Interest</td>
<td>11,330</td>
</tr>
<tr>
<td>Real Estate</td>
<td>167,709</td>
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<tr>
<td>Insurance Policies</td>
<td>1,978,050</td>
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<tr>
<td>Improvements, Furniture &amp; Equipment</td>
<td>54,183</td>
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<tr>
<td><strong>Total Other Assets</strong></td>
<td><strong>2,223,167</strong></td>
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<tr>
<td><strong>Total Assets</strong></td>
<td><strong>38,250,364</strong></td>
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### Liabilities and Fund Balances

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<tr>
<th>Category</th>
<th></th>
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<tbody>
<tr>
<td>Accounts Payable</td>
<td>38,286</td>
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<tr>
<td>PTO Bank Liability</td>
<td>26,280</td>
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<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>64,566</strong></td>
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### Fund Balances

<table>
<thead>
<tr>
<th>Category</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>1,867,858</td>
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<tr>
<td>Donor Advised</td>
<td>10,517,254</td>
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<tr>
<td>Charitable Gift Annuity</td>
<td>323,140</td>
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<tr>
<td>Designated</td>
<td>11,426,385</td>
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<tr>
<td>Field of Interest</td>
<td>4,841,321</td>
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<tr>
<td>Scholarships</td>
<td>5,973,521</td>
</tr>
<tr>
<td>Charitable Remainder Trusts</td>
<td>2,902,813</td>
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<tr>
<td>Life Estate Reserved</td>
<td>120,008</td>
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<tr>
<td>Administration</td>
<td>213,498</td>
</tr>
<tr>
<td><strong>Total Fund Balance</strong></td>
<td><strong>38,185,798</strong></td>
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</table>

### Revenue and Support

### Contributions

<table>
<thead>
<tr>
<th>Category</th>
<th></th>
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<tbody>
<tr>
<td>Donor Advised Funds</td>
<td>3,264,438</td>
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<tr>
<td>Gift Annuity</td>
<td>50,000</td>
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<td>Designated Funds</td>
<td>550,511</td>
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<td>Field of Interest Funds</td>
<td>772,166</td>
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<tr>
<td>Scholarship Funds</td>
<td>734,596</td>
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<td>Administration</td>
<td>330,181</td>
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<td><strong>Total Contributions</strong></td>
<td><strong>5,701,872</strong></td>
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### Other Revenue (Investment Returns)

<table>
<thead>
<tr>
<th>Category</th>
<th>Dec. 31, 2016</th>
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<tbody>
<tr>
<td><strong>Money Market Portfolio</strong></td>
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<tr>
<td>Money Market Pool Interest Income</td>
<td>43,895</td>
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<tr>
<td><strong>Total Money Market Portfolio</strong></td>
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<tr>
<td><strong>Fixed Income Securities Portfolio</strong></td>
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<tr>
<td>Interest Income</td>
<td>241,876</td>
</tr>
<tr>
<td>Capital Gain/(Losses) - Realized</td>
<td>(298,844)</td>
</tr>
<tr>
<td>Capital Gain/(Losses) - Unrealized</td>
<td>224,408</td>
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<tr>
<td><strong>Total Fixed Income Securities Portfolio</strong></td>
<td><strong>167,440</strong></td>
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<tr>
<td><strong>Equity Securities Portfolio</strong></td>
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</tr>
<tr>
<td>Dividend Income</td>
<td>462,129</td>
</tr>
<tr>
<td>Capital Gain/(Losses) - Realized</td>
<td>357,856</td>
</tr>
<tr>
<td>Capital Gain/(Losses) - Unrealized</td>
<td>410,556</td>
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<tr>
<td><strong>Total Equity Securities Portfolio</strong></td>
<td><strong>1,230,541</strong></td>
</tr>
<tr>
<td><strong>American Funds Portfolio</strong></td>
<td></td>
</tr>
<tr>
<td>Dividend Income</td>
<td>62,613</td>
</tr>
<tr>
<td>Capital Gain/(Losses) - Realized</td>
<td>33,877</td>
</tr>
<tr>
<td>Capital Gain/(Losses) - Unrealized</td>
<td>23,982</td>
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<tr>
<td><strong>Total American Funds Portfolio</strong></td>
<td><strong>120,472</strong></td>
</tr>
<tr>
<td><strong>Charitable Remainder Trust Portfolio</strong></td>
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<tr>
<td>Interest and Dividend Income</td>
<td>87,645</td>
</tr>
<tr>
<td>Capital Gain/(Losses) - Realized</td>
<td>(22,890)</td>
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<tr>
<td>Capital Gain/(Losses) - Unrealized</td>
<td>192,474</td>
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<tr>
<td><strong>Total CRT Portfolio</strong></td>
<td><strong>257,229</strong></td>
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<tr>
<td><strong>Segregated Funds Portfolios</strong></td>
<td></td>
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<tr>
<td>Interest and Dividend Income</td>
<td>169,882</td>
</tr>
<tr>
<td>Capital Gain/(Losses) - Realized</td>
<td>(83,079)</td>
</tr>
<tr>
<td>Capital Gain/(Losses) - Unrealized</td>
<td>326,620</td>
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<tr>
<td><strong>Total Segregated Portfolio</strong></td>
<td><strong>413,423</strong></td>
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<tr>
<td><strong>Other Investment Earnings</strong></td>
<td></td>
</tr>
<tr>
<td>Capital Gain/(Loss) - Stock Gifts</td>
<td>(6,249)</td>
</tr>
<tr>
<td>Change in Life Insurance Values</td>
<td>97,945</td>
</tr>
<tr>
<td><strong>Total Other Investment</strong></td>
<td><strong>91,696</strong></td>
</tr>
<tr>
<td><strong>Total Other Revenue</strong></td>
<td><strong>2,324,696</strong></td>
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</tbody>
</table>

### Grants and Expenses

### Grants

<table>
<thead>
<tr>
<th>Category</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted Funds</td>
<td>100,848</td>
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<tr>
<td>Donor Advised Funds</td>
<td>1,195,489</td>
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<tr>
<td>Designated Funds</td>
<td>1,251,857</td>
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<tr>
<td>Field of Interest Funds</td>
<td>578,392</td>
</tr>
<tr>
<td>Scholarships Funds</td>
<td>223,753</td>
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<tr>
<td><strong>Total Grants</strong></td>
<td><strong>3,350,339</strong></td>
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</tbody>
</table>

### Administration Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Directly Assignable Fund Expenses</td>
<td>296,086</td>
</tr>
<tr>
<td>Administrative Expenses</td>
<td>887,409</td>
</tr>
<tr>
<td><strong>Total Administration Expenses</strong></td>
<td><strong>1,183,495</strong></td>
</tr>
</tbody>
</table>

### Total Grants and Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Grants and Expenses</strong></td>
<td><strong>4,533,834</strong></td>
</tr>
<tr>
<td><strong>Revenue Less Grants and Expenses</strong></td>
<td><strong>3,492,734</strong></td>
</tr>
<tr>
<td><strong>Fund Balance, beginning of period</strong></td>
<td><strong>34,693,064</strong></td>
</tr>
<tr>
<td><strong>Fund Balance, end of period</strong></td>
<td><strong>38,185,798</strong></td>
</tr>
</tbody>
</table>
2016 AT A GLANCE

$5.7 MILLION IN CONTRIBUTIONS

$3.3 MILLION IN GRANTS AND SCHOLARSHIPS

$38.2 MILLION IN ASSETS

600 CHARITABLE FUNDS

$43.3 MILLION IN CUMULATIVE GRANTS AND SCHOLARSHIPS SINCE 1982

1982
FOUNDED

2000
$3.7 MILLION

2005
$13.6 MILLION

2010
$23 MILLION

2016
$43.3 MILLION

CUMULATIVE GRANTS AND SCHOLARSHIPS AWARDED