

The background of the cover features a stylized, light blue palm tree on the right side, set against a gradient of light blue and turquoise. Below the palm tree, there is a horizontal band of turquoise representing the ocean, and a thin, light-colored band representing the beach. The overall aesthetic is clean and modern.

# On The **Horizon**

2016-2017 ANNUAL REPORT



**COMMUNITY FOUNDATION**  
for Palm Beach and Martin Counties

Your Philanthropy  
Our Community  
Better Together

A large, stylized green leaf graphic is positioned in the upper left corner of the page. It has a thick, dark green outline and a lighter green fill, with several pointed lobes extending towards the top right.

**Our Mission** Together with our donors,  
serve as the leading  
catalyst for building vibrant  
communities through  
meaningful philanthropy.

# Letter from the **PRESIDENT**



Dear Friends,

We spent the better part of this year reflecting back on our history.

We listened to you – our valued fundholders, our partners, our nonprofits, our community. And after we listened, we knew it was time to create a new three-year strategic plan.

We are always looking for ways to provide you with better services and more efficient, effective philanthropy. What do we envision for you? And what's on the horizon?

**Donor-Centric Services** – we're adding new technology and realigning team members to provide you with a better philanthropic experience. We are eliminating fund minimums and offering new fund options to better customize your philanthropy. We pledge to enhance your joy of giving, whatever that might be, so you can give anywhere, any time, and in any amount with just a few clicks of a button.

**Investing for Impact** - We strive to be the leading convener for change in our community. This type of leadership requires asking tough questions. This year we'll dig deeper to discover what community issues are high priority and how we can bring experts around the table to solve problems.

We want to continue partnering with donors and other funders and offer more **opportunities to co-invest with the Foundation** for even greater charitable impact. We will also offer more fund options for our local nonprofits and make it as easy as possible to apply for grants.

This year we salute and honor our outgoing Board chair, J.B. Murray. After serving three years as Board Chair and ten years on the Board, we now welcome Sherry Barrat to the helm of the Community Foundation. Sherry was instrumental in developing our new strategic plan, and we look forward to the next three years under Sherry's leadership.

**Thank you for your continued support. Our horizon is a bright one. Let's get to work – together!**

Bradley Hurlburt  
President & CEO

# NEW OFFERINGS & Updates

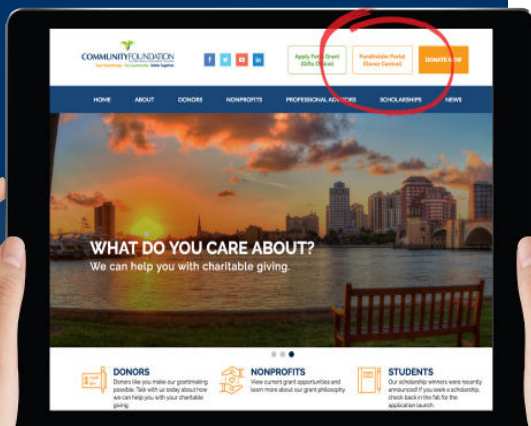
## DonorCentral

DonorCentral is an online service for fund advisors of the Community Foundation. DonorCentral enables you to view your fund balances, gifts to the fund, grants made, and grants pending online - with most information updated daily. Donor advised fund advisors can also easily recommend grants online.

Bonnie Mitchell wants to help you get DonorCentral access. You can contact her at [bmitchell@cpfbmc.org](mailto:bmitchell@cpfbmc.org) or call (561) 340-4505.



## View Your Fund Online!



## TYPES OF FUNDS

- **COMMUNITY IMPACT FUND:** for visionary donors who want their philanthropy to continue after their lifetime and want their gift to meet the needs of generations to come. Our team of experts will make annual grants to address priority community issues.
- **\*CORPORATE / COMMITTEE ADVISED FUND:** for businesses and organizations to impact the community by distributing charitable dollars through a corporate or committee structure.
- **DESIGNATED FUND:** For donors firmly committed to supporting specific charities. The donor names the charity or charities they'd like to benefit and makes grants to the charities named on an annual basis.
- **DONOR ADVISED / \*FAMILY FOUNDATION FUND:** for individuals and families to support a variety of causes throughout the United States whenever they choose. These funds are a low-cost alternative to a family foundation.
- **FIELD OF INTEREST FUND:** for donors who have a particular area of charitable interest. They name the area, and then we go to work researching and preparing a grant spending plan in that field.
- **NONPROFIT ENDOWMENT FUND:** an endowment established with the Foundation with a long-term time horizon. The nonprofit receives annual distributions for unrestricted use and a permanent source of income.
- **\*NONPROFIT INVESTMENT FUND:** a flexible fund established with the Foundation with a short or long-term investment strategy.
- **\*LEGACY FUND:** donors establish legacy funds to receive assets from a will, trust or retirement beneficiary plan and designate how their charitable contributions will benefit their favorite causes after their lifetimes.
- **SCHOLARSHIP FUND:** for donors who want to help local students achieve the dream of a college education; these funds often memorialize a loved one.

\* new fund offering

*"It would not be possible for me to provide meaningful guidance as a donor advisor without the help and counsel of Community Foundation staff and officers."*

– **Peter Bermas**, Donor Advisor



# BOARD of Directors



The Community Foundation's Board of Directors is made up of dynamic individuals and community leaders who govern the Foundation, establish policy, set priorities and make final grant decisions. All members are volunteers, except for the President and CEO.

*Pictured at J.B. Murray's farewell party.*

**Above L to R:** Tim Burke, newly elected 2018 Board Member, Susan Brockway, George Elmore, Lore Dodge, Brad Hurlburt, Sherry Barrat, J.B. Murray, Doug Stockham, Jane Mitchell, Andrew Kushner, Christina Macfarland, Kathleen Emmett Hager, Kathleen Kroll, Chris Storkerson

**Photo credit:** Tracey Benson Photography

## 2016-2017 BOARD OFFICERS

**J.B. Murray**  
*Chair*

**Sherry S. Barrat**  
*Vice-Chair*

**Douglas A. Stockham**  
*Vice-Chair*

**Steven A. Templeton, CPA**  
*Treasurer*

**Andrew Kushner**  
*Secretary*

**Deborah Dale Pucillo**  
*Immediate Past Chair*

**Bradley A. Hurlburt**  
*President & CEO*

## BOARD OF DIRECTORS

Anson M. Beard, Jr.  
Susan P. Brockway  
Lore Moran Dodge  
George T. Elmore  
Kathleen Emmett Hager  
Dennis Gallon  
Dennis S. Hudson III  
Kathleen J. Kroll  
Christina M. Macfarland  
Elizabeth "Libby" Marshall  
Peter Matwiczuk  
Jane M. Mitchell  
Lisa M. Morgan  
Virginia H. Smith  
Caroline B. Sory  
Susan S. Stautberg  
Christopher W. Storkerson  
Roy J. Zuckerberg

# PROFESSIONAL Advisors

## We work with our donor's trusted advisor.

The Community Foundation works frequently with professional advisors. These trusted professionals have helped their clients build businesses, provide for their family and grow assets. Clients often rely on these professionals for advice.

Professional advisors have their client's best interests at heart. So do we.

## We work with donors who want to make an impact

We specialize in the strategic donor who doesn't want the administrative responsibility of their own foundation. The impact-minded donor who doesn't think a check to their favorite charity is quite enough. The future-thinking donor who wants to teach the value of philanthropy to their heirs.

### We Are Different

Our mission is to help people with meaningful philanthropy. We offer straightforward, flexible solutions when "taxable moments" happen in our donors' lives or when charitable conversations arise.

### We Are Proven

Our donors and their advisors know that we have the tools to grow charitable giving on a large scale, maximizing impact in the community.

### We Are Flexible

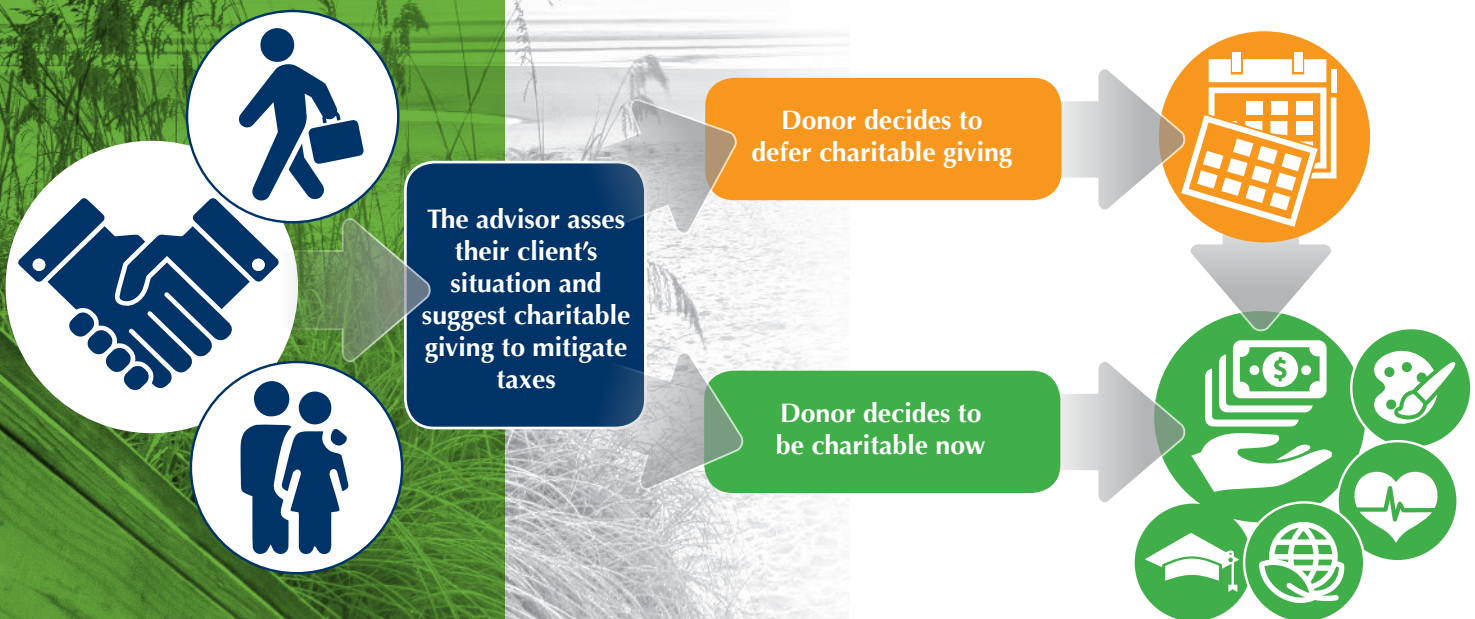
Whether donors are looking to lighten their tax burden, invest in a charity, shift financial resources during retirement or create a legacy of giving, we are here to make it simple and tailored to our donors' needs.

### We Are The Best At What We Do

Driven by our motto "better together," we have worked hard to build a reputation of trust, leadership and neutrality. We excel in our grantmaking, our stewardship and our ability to convene discussions that help make the greatest impact.

### We Are Customized

We allow our donors to invest their Community Foundation charitable fund through our Individually Managed Accounts program or through pooled investment portfolios.







## We Make Giving Simple



### DONOR ADVISED FUNDS

Flexible and convenient, allowing donors to support multiple causes, any time they choose. They are simple, powerful and a highly personal way to give.



### FAMILY FOUNDATION FUNDS

Provide multi-generational options for your family's giving without the administrative responsibility of a private foundation.



### DESIGNATED FUNDS

Benefit up to four nonprofit organizations of the donor's choice, ensuring a steady annual stream of support.



### LEGACY FUNDS

Allows donors to establish a plan for gifts after their lifetime, knowing that the causes they care about will be supported for generations.

*"I trust the Community Foundation as a knowledgeable, charitable resource for my clients with local connections and great customized services to meet their needs. "*

**– Local Professional Advisor**



Contact Sheila Kinman, CAP® for more information about our professional advisor program or Individually Managed Accounts.

(561) 340-4503  
[kinman@cfpbmc.org](mailto:kinman@cfpbmc.org)

# GRANTS

Collectively, the **Community Foundation** provided over **\$9.98 million in grants & scholarships** in its 2016-2017 fiscal year.

The majority of our annual grantmaking is directed by donors to the causes they care about. Additional grants are made possible through Community Impact Funds, which are established by philanthropists who have entrusted the Foundation to identify and address critical issues and community needs.



## FOREVER NONPROFIT ENDOWMENT CHALLENGE: \$441,100

*Funded by John D. and Catherine T. MacArthur Fund, the Martens Fund and Community Impact Fund*

Armory Art Center	\$25,000
Boca Raton Museum of Art	\$25,000
CROS Ministries	\$25,000
Cultural Council of Palm Beach County	\$25,000
Delray Beach Public Library	\$25,000
Dreyfoos School of the Arts Foundation	\$10,000
Education Foundation of Martin County	\$25,000
Education Foundation of Palm Beach County	\$25,000
Families First of the Palm Beaches	\$10,000
Gale Academy Leadership Endowment Fund	\$1,100
Habitat for Humanity, Palm Beach County	\$25,000
HomeSafe	\$25,000
Legal Aid Society of Palm Beach County	\$25,000
Palm Beach State College	\$25,000
Peggy Adams Animal Rescue League	\$10,000
Place of Hope	\$10,000
Quantum House	\$25,000
The Historical Society of Palm Beach County	\$25,000
United Way of Palm Beach County	\$25,000
Urban League of Palm Beach County	\$25,000
YWCA of Palm Beach County	\$25,000

## ALLEVIATE HUNGER: \$25,000

*Funded by the Community Impact Fund*

Palm Beach County Food Bank	\$25,000
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## 2016-2017 COMMUNITY IMPACT GRANT AWARDS: \$1,010,068

*Funded by John D. and Catherine T. MacArthur Fund, Community Impact Fund and Susan R. John W. Sullivan Fund for Martin County*

City of West Palm Beach	\$115,000
The Everglades Foundation	\$153,900
Florida Fishing Academy	\$165,000
Friends of MacArthur Beach State Park	\$83,489
The Institute for Regional Conservation	\$35,000
Friends of Mounts Botanical Garden	\$160,000
Nature Conservancy	\$50,000
Sandaway Discovery Center	\$62,679
South Florida Science Center & Aquarium	\$100,000
United Way of Palm Beach County	\$85,000

## 2016-2017 FIELD OF INTEREST GRANT AWARDS: \$123,200

The Arts Council	\$10,000
Bethesda Hospital Foundation	\$25,000
Families First of the Palm Beaches	\$2,700
Digital Vibez	\$4,000
Florida Outreach Center for the Blind	\$1,000
Martin County School District	\$7,500
Preservation Foundation of Palm Beach	\$17,000
Speak Up For Kids of Palm Beach County	\$8,500
Student Aces	\$3,500
The Scripps Research Institute	\$34,000
West Palm Beach Library Foundation	\$10,000



# GRANT Highlights

## SANDOWAY DISCOVERY CENTER \$62,679

Sandoway's Jr. Naturalist Program provides a path to success for disadvantaged students from low socio-economic and minority backgrounds from Title 1 schools and programs including Florence Fuller, Paul's Place and the Achievement Center through fun nature activities. Many of these students have never seen the ocean before.

Sandoway will expand its Junior Naturalist Program with the help of this grant to include environmental crises classes that emphasize participation, protection and preservation.

*Photo credit: Rachel S. O'hara; Gulf Stream School*



## FLORIDA FISHING ACADEMY \$165,000

Florida Fishing Academy will create a fun, interactive public messaging Mobile Lab. With this new hands-on educational program, students will explore a working model of Florida's watershed at their school. They will learn about the effects of pollution, beach erosion and how it can change the marine-life food chain. Students will get to touch and hold various marine life critters in the touch tank and will participate in an educational oil spill clean-up activity. The Mobile Lab helps students explore the importance of water quality, conservation and a healthy marine environment.



# GRANT Highlights

## COMING TOGETHER FOR A BETTER COMMUNITY

### GEHL ARCHITECTS PROJECT \$115,000



The Community Foundation is engaged in a long-term neighborhood revitalization project to improve areas in West Palm Beach. Its goals include providing safe and affordable housing, good public space and a high quality of life to our local citizens. The Foundation joined with the Knight Foundation, Quantum Foundation and the City of West Palm Beach to fund a public life survey – a comprehensive understanding of how people use public space by focusing on a “people first” design. This survey included Howard Park, Historic Northwest, Pleasant City, Coleman Park and Northwood. This year’s efforts identify ways to improve quality of life, provide good public space to everyone, improve economic development and ensure all citizens have access to public transportation. The project kicks off with a series of pilot projects throughout the City of West Palm Beach in fall 2017.

*“ Without our philanthropic partners like the Community Foundation, none of this would have happened.”*

– **Christopher Roog**, Director of Economic Development;  
City of West Palm Beach



**ACHIEVE’S MISSION:** to collectively ensure an integrated and effective system of supports from middle school through post-secondary that empowers students for career success.

### ACHIEVE PALM BEACH COUNTY \$60,000



One unique aspect of a Community Foundation is that our impact can be much greater than our grants. The Foundation was the fiscal sponsor of a community initiative to assure Palm Beach County students would do more than just graduate high school, or attend college/trade school. Called Achieve Palm Beach County, the vision is to ensure that every Palm Beach high school graduate completes a post-secondary credential within six-years of high school graduation that prepares them for a meaningful career with a sustainable wage.

Approximately 12 local funders joined with the Community Foundation to establish the first ever local college access network (LCAN) in our community. This is a national educational movement supported by the Kresge Foundation, the Helios Foundation in Florida and many others. The community’s collective approach to a nationwide problem resulted in funding from these partners. More than 135 organization’s participated in Achieve Palm Beach County’s creation, including many local colleges and universities, the school district, county partners, corporate partners and many more.

# SCHOLARSHIPS

**125** DESERVING STUDENTS  
received **\$1,324,668**  
in **SCHOLARSHIPS AWARDED**  
by the Foundation and its  
generous donors.



Scholarship recipient Joezer is headed to Nashville this year to attend Vanderbilt University. He was grateful to receive a \$10,000 scholarship from the Community Foundation.

*"I am so thankful that through God's will I was selected for the Edward T. Bedford Scholarship," says Joezer*

Scholarship winner Karen was adopted from a small Russian town about four hours east of Moscow. Being passed around to orphanages and a Russian hospital, she was grateful to find loving parents in South Florida. Here, they helped her overcome her learning disabilities and found the resources she needed to succeed today. Karen's goal is to receive her masters in special needs education at Boston College.

*"It means a great deal to me that I can help alleviate some of my parents' financial burden by winning a scholarship," says Karen*





# OUR FUNDS

## 33 New funds this year

- Peggy Adams Animal Rescue League Endowment Fund
- Paint the Future - The Armory Art Center Endowment Fund
- Boca Raton Museum of Art Forever Endowment Fund
- The Peter and Susan Brockway Fund
- Dr. William J. Bryant Family Fund
- CROS Ministries
- Cultural Council of Palm Beach County Endowment Fund
- Delray Beach Public Library Forever Endowment Fund
- Dreyfoos School of the Arts Foundation Fund
- Education Foundation of Palm Beach County
- Education Foundation of Martin County Endowment Fund
- Families First of Palm Beach County Foundation, Inc.
- Steve and Jeannie Fowle Fund
- Michael and Jane Grossman Fund
- Habitat for Humanity of Palm Beach County Building for a Lifetime
- Harry Hamilton Endowment Fund
- Harry Hamilton Foundation Fund
- HomeSafe Foster Care Recreation Fund
- Impact 100 Men Palm Beach County
- Investment in Justice Endowment Fund
- Virginia and Harvey Kimmel Family Fund
- Kinman Family Charitable Fund
- Elizabeth E. Matthews Fund
- Oristano Scholar Fund II
- Palm Beach State College Support
- James Augustine Ponce Endowment for Exhibition Development at the Richard and Pat Johnson Palm Beach County History Museum
- Quantum House Endowment Fund
- Edward Rodgers Endowment
- Salem Wade Charitable Fund
- United Way of Palm Beach County Endowment Fund
- Rear Admiral Philip A. Whitacre Scholarship Fund
- Cynthia A. Williams Fund
- YWCA of Palm Beach County Endowment Fund

## OUR FUNDS as of June 30, 2017

- 211 Palm Beach Treasure Coast Endowment Fund
- Helen Harting Abell Fund
- Sheldon B. Ackerman Fund
- The Acorn Fund
- Peggy Adams Animal Rescue League Endowment Fund
- Administrative Endowment Fund
- Administrative Fund
- Advisors for Philanthropic Impact Fund-CAP Scholarship
- Advisors for Philanthropic Impact Fund
- Albert and Marjorie Alfus Fund
- Dwight and Lyona Allison Fund for Administrative Endowment
- Lyona and Dwight L. Allison, Jr. Fund
- ALS Awareness and Education Fund
- Altobello Family Donor Advised Fund
- Inger and H. Loy Anderson Jr. Foundation Fund
- Helen M. Andrews Charitable Lead Annuity Trust
- Paint the Future - The Armory Art Center Endowment Fund
- The Arts Council of Martin County Endowment Fund
- John S. Atwater Memorial Scholarship Fund
- Matthew James Audin Memorial Scholarship Fund
- Henry and Mildred Baldwin Memorial Endowment Fund
- Bank of America Minority Student Scholarship
- Barnett-Merrill Family Fund
- Barrat Family Fund
- Laurence E. Barreca Fund
- Laurence E. Barreca Scholarship Fund
- Edward T. Bedford Foundation Scholarship Fund
- Maura and William Benjamin Scholarship Fund
- William E. Benjamin, II Unrestricted Fund
- Thomas William Bennett Memorial Scholarship Fund
- Bennett/Darwin Family Scholarship Fund
- Big Dan's Big Give Fund
- John H. Birdsall Family Fund
- Lisa Bjork Memorial Scholarship
- George W. Blabon, III Endowed Fund



- Thomas H. Blash and Martha Blash Research Fund
- Walter & Adi Blum Scholarship Fund
- Walter & Adi Blum Scholarship Fund 2
- Boca Raton Museum of Art Forever Endowment Fund
- Helen and Bob Bodington Fund
- The Bohnett Family Fund
- Boone Horticultural Scholarship Fund
- Mary R. and William C. Bowden Fund
- Boys and Girls Clubs of Palm Beach County Great Futures Fund
- Briggs-Trimble Family Charitable Fund
- The Peter and Susan Brockway Fund
- Harry and Bertha Bronstein Memorial Scholarship Fund
- Dr. William J. Bryant Family Fund
- Robert A. Butler Estate and Dr. Richard H. Butler Fund
- Mary Beth and Jack Callahan Fund
- Cardinals-Marlins Fund
- Center for Creative Education Endowment Fund
- The Chairman's Fund
- Chapin/Kiefer Family Fund
- Sally and Don Chester Family Fund
- Allen C. Clark Memorial Scholarship Fund
- Irene Gibson Clay Scholarship Fund
- Frank and Marie Cleary Memorial Scholarship Fund
- Sandra G. Cofer Charitable Remainder Unitrust
- Julian and Eunice S. Cohen Fund
- Julian and Eunice S. Cohen Scholarship Fund
- Coleman Family Fund
- Nicholas and Briggs Coleman Fund
- Bradley and Carol Collins Fund
- Bradley Collins Memorial Scholarship Fund
- Colonial Bank Scholarship Fund
- Community Garden Green Fund
- Community Impact Fund
- Community Needs Assessment Fund
- Community Scholarship Fund
- Mark W. Cook Fund
- Christopher N. Coppola Scholarship Fund
- Ingebord Crede Memorial Scholarship Fund
- The Rembert T. Cribb Family Fund
- CROS Ministries
- Cuban Scholarship Fund
- Cultural Council of Palm Beach County Endowment Fund
- Julie F. & Peter D. Cummings Fund
- Cummings Rafferty Family Fund
- Joseph DaCorte Fund
- Don Dahlberg Memorial Scholarship Fund
- James & Judy Daleen Fund
- Terry Darby Memorial Scholarship Fund
- Elaine and Dave Darwin Fund
- Dr. Sidney Davidson Nursing Scholarship Fund
- The Davis Family Fund
- Charles K. and Lena P. Davis Donor Advised Fund
- James H. Davis Memorial Scholarship Fund
- The de Peyster Family Fund
- Margo and Ashton de Peyster Fund
- Delray Beach Playhouse Ernest G. Simon Scholarship Fund
- Delray Beach Public Library Forever Endowment Fund
- Dominique Trust
- Don Donahue Fund
- The Willard D. Donnelley Endowment Fund
- Dreyfoos Fund
- Dreyfoos School of the Arts Foundation Fund
- The DuBois Fund
- Rebecca Walter Dunn Fund
- The Durkin Family Fund
- Early Childhood Education Fund
- Early Learning Coalition of Palm Beach County Fund
- Dr. William and Nancy Earnhart Fund
- Easter Seals Palm Beach, Martin and St. Lucie Fund
- Ellen Beth Eddleman Memorial Scholarship Fund
- Education Foundation of Martin County Endowment Fund
- Education Foundation of Palm Beach County
- George and Wilma Elmore Fund
- The Emmett Fund
- The Environmental Fund
- Ernest Frank Scholarship Fund Created in Memory of Arlene Fulton Hammond
- Families First of Palm Beach County Foundation, Inc.
- Ruth Lewis Farkas Fund
- H. David Faust Memorial Scholarship Fund
- Festival Legacy Circle Fund
- The Nettie Spiro Finkle Scholarship Fund
- First Bank and Trust of Indiantown Directors Memorial Scholarship Fund
- Marjorie S. Fisher Fund
- Mary D. Fisher Fund
- Flah Family Foundation for Childhood Trauma
- Flicker/Freudenberg Scholarship Fund
- Florida Council on Economic Education Fund
- Steve and Jeannie Fowle Fund
- Kathryn Fox Fund
- Frisbie Family Fund
- Funston Family Fund
- Gala Giving Circle
- Galadriel Peace Fund
- Galadriel Peace Fund II
- Gale Academic Leadership Endowment Fund
- Katherine and Richard Garlington Fund
- Fran Gay Memorial Scholarship Fund
- John Giba Youth Leadership Fund
- Thomas A. Giesey Charitable Remainder Unitrust
- The Gingras Family Fund
- Gionfriddo Health Education Fund
- Giuffrida Family Fund
- Patrick J. and Jody H. Gleason Environmental Fund
- Scott R. Goering Legacy Fund
- Mary Jane Grant Fund
- Richard and Helen Grant Fund
- Grassy Waters Conservancy Fund
- The Gratitude Fund
- The Great Give
- Michael and Jane Grossman Fund
- The Gubelmann Family Foundation Scholarship Fund
- Gurto Family Fund
- Jeffrey Gutin Fund
- Gene J. Guttman CGA Fund
- Jane and Gene Guttman Fund
- Habitat for Humanity of Palm Beach County Building for a Lifetime
- Harry Hamilton Endowment Fund
- Harry Hamilton Foundation Fund

*Funds list continued on page 12*

# OUR FUNDS

*Funds list continued from page 11*

- Robert D. Handley Memorial Scholarship Fund
- Hardrives of Delray, Inc. Fund
- Harrington Scholarship Fund for Martin County
- J. Ira and Nicki Harris Fund
- Rita Dee Hassenfeld Fund
- Andrew Hatfield Scholarship Fund
- Kathy Heming Scholarship Fund
- Heather and Patrick Henry Scholarship Fund
- T.M. Henry Family Fund
- The Heston Fund
- Historical Society of Martin County
- J. Peter Hoffman Memorial Scholarship Fund
- HomeSafe Foster Care Recreation Fund
- Hope for the Future Fund
- Phyllis Hopman Arts and Culture Fund
- Phyllis Hopman Memorial Endowment Fund
- Ray Howland Scholarship Fund
- The Lisa L. Huertas Family Fund
- The Hurlburt Family Fund
- Frank P. Husvar Memorial Scholarship Fund
- Impact 100 Men Palm Beach County
- Impact 100 Palm Beach County
- Impact The Palm Beaches
- Investment in Justice Endowment Fund
- The Jackson Family Foundation Fund
- Robert and Deborah Jacobson Scholarship Fund (under the auspices of the Robert and Deborah Jacobson Charitable Trust)
- The Freddie Stebbins and James Julius Jefferson Family Fund
- R. Bruce Jones Memorial Scholarship Fund established by the Sugar Cane Growers Cooperative of Florida
- Jupiter Inlet Lighthouse Endowment Fund
- K2 KIDS
- Alfred and Elizabeth Kay Memorial Fund
- Thomas F. Kearney Memorial Scholarship Fund
- Virginia and Harvey Kimmel Family Fund
- Kinman Family Charitable Fund
- The Kirkwood Fund
- Dixie Kirsch Family Foundation Fund
- H. Kirsch Family Foundation Fund
- Ilse Klassen Fund
- Danny Knichel Memorial Scholarship Fund
- Sunny and Bonnie Knickerbocker Fund
- John S. and James L. Knight Foundation Fund
- Abby Gelles Knott Fund
- Robert P. Koch Memorial Scholarship Fund
- William F. Koch, Jr. Fund
- Ryan Kollmer Memorial Scholarship Fund
- Kraus-Jeveli Family Fund
- Laura E. and Wilbur J. Kupfrian Family Foundation Fund
- Devon Kurlander Memorial Fund
- Judy Lake Memorial Fund
- Landon Fund
- LCAN Fiscal Sponsorship
- George and Arlene F. Lepeska Scholarship Fund
- Richard G. Lepeska Fund
- Stefanie Liberti Memorial Scholarship Fund
- Marcelle Hull Littell
- Loblolly Scholarship Fund
- Loggerhead Marinelife Center Endowment Fund
- Lorenzini Family Fund
- Lottie French Lewis Fund
- Inez Peppers Lovett and Charlie Ellington Scholarship Fund
- LSP Educational Scholarship Fund
- Paul L. MacAnaney Memorial Scholarship Fund
- John D. and Catherine T. MacArthur Foundation Fund
- John D. and Catherine T. MacArthur Fund
- The Macfarland Philanthropic Fund
- MacGuire Family Fund
- Honorable Eva W. Mack, First Black Mayor of West Palm Beach Scholarship Fund
- Daniel J. Mahoney, Jr. Fund
- Mickey Mandelblatt Memorial Scholarship Fund
- Mariner Sands Chapel Fund
- C. Charles Marran Charitable Fund
- John and Nancy Marshall Everglades Education Fund
- Marie Graber Martens Fund
- Philip Maslowe Orphanage/Educational Fund
- Elizabeth E. Matthews Fund
- Michael Flagler Matthews Sports Education Fund
- William Morrison Matthews Fund
- Jordan Camino Evert McCracken Memorial Fund
- Michelle McGann Fund
- Thomas Ladue McGinty Memorial Environmental Fund
- Allan J. McIntosh Fund
- Esther Sheehy McShurley Scholarship Fund
- Alma Lu Meerdink Fund
- Nicholas Megrath Scholarship Fund
- Adele Wells Meyer Memorial Scholarship Fund
- Sydelle F. and Arthur I. Meyer Scholarship Fund
- Courtlandt and Gina Miller Scholarship Fund
- Joyce Lanier Milner Fund
- Matthew "Bump" Mitchell/Sun-Sentinel Scholarship Fund
- Helen Powers Monahan Fund
- Helen Powers Monahan Scholarship Fund
- Stella Monchick-West Hospice Educational Fund
- Mordes Family Foundation Fund
- The Morgan Family Fund
- Morris Family Fund
- Morse Hill Foundation Palm Beach Donor Advised Fund
- Jennifer Morton Fund
- Mosaic Fund
- Harding Mott, Sr./US Sugar Corp. Training for Excellence Fund
- Norman and Sarah Murphy Fund
- The Murray Family Fund
- John T. Murray, M.D. Children's Health Fund
- Jon M. Napierkowski Memorial Scholarship Fund
- Mabry M. Noxon Scholarship Fund
- Perry-Belle and Phillip D. O'Connell Pioneer Fund
- Phillip D. O'Connell, Sr. Memorial Scholarship Fund
- Jacqueline O'Gorman Fund





- Olivia Foundation Fund
- Oristano Scholar Fund
- Oristano Scholar Fund II
- Nan Ourisman Fund
- Denise Lynne Padgett Scholarship Fund
- Palm Beach Chamber of Commerce Business Scholarship Fund
- Palm Beach Kennel Club Scholarship Fund
- Palm Beach Newspapers Scholarship Fund
- Palm Beach State College Support
- Palm Beach Zoo Wildlife Conservation Endowment
- The Paradise Fund
- Parmet Fund
- PBC Society of Plastic & Reconstructive Surgeons, Inc. Scholarship Fund
- Stephen Madry Peck, Jr. Memorial Scholarship Fund
- Anna Marie Peterson Fund
- The Peterson Family Fund
- Mary and Robert Pew Public Education Fund
- James Augustine Ponce Endowment for Exhibition Development at the Richard and Pat Johnson Palm Beach County History Museum
- Betty S. Price Fund
- The Nick Price Fund
- Quantum House Endowment Fund
- The Reuter Scholarship Fund
- Ritter Family Fund
- Dr. Ray Robinson Endowment Fund
- The Rodgers Family Foundation Fund
- Edward Rodgers Endowment
- Gwen Baker Rodgers Memorial Fund
- Marion Rossiter-Smith Fund
- Colonel Karl V. Price Lake Worth Community High School Air Force Jr. ROTC Scholarship Fund
- Sadler-Hull Family Donor Advised Fund
- Safety Net Fund
- St. Mary's Extended Education Fund
- Salem Wade Charitable Fund
- Lawrence A. Sanders Fund to Promote Literacy
- Lawrence A. Sanders Scholarship Fund for Creative Writing
- Sandoway Discovery Center Endowment Fund
- Kim Love Sartory Scholarship Fund
- Theodore Satter Memorial Scholarship Fund
- Leah G. Schad Memorial Scholarship Fund
- Charles and Catherine Schmidt Fund
- Schramm-Brown Fund
- Kyle Fredrik Schuemann Scholarship Fund
- Claire B. Schultz Memorial Scholarship Fund
- David C. Scott Fund for ALS Research Fund
- David C. Scott Fund
- Jo Ann and Edward Sears Endowed Fund
- Jo Ann and Edward Sears Fund
- Sharma Family Fund
- Pundit Mulchand and Janki Devi Sharma Scholarship Fund
- Peter Jay Sharp Foundation Scholarship Fund for Conservation/Environment Studies
- Tara Sheridan Scholarship Fund
- Joan and David Sherman Fund
- Joan and David Sherman Fund 2
- Allan E. and Carol T. Shore Fund
- Myrna Abelman Siegel Scholarship Fund
- Mary B. Silk Memorial Fund
- Silver Family Fund
- Bickley F. and Russell G. Simpson Fund
- Dan Smith Dairy Scholarship Fund
- James R. and Gladys R. Smith Fund
- Eliot and Ruth Snider Fund
- Edward W. Snowdon and Lee Hill Snowdon Fund
- Beverly Sommer Scholarship Fund
- The Sorrel Ross Bollet Endowment Fund
- Lance Corporal Ryan J. Sorensen, USMC Liberty Scholarship Fund
- Squire, Sanders & Dempsey L.L.P. Administrative Endowment Fund
- Squire, Sanders & Dempsey L.L.P. Stautberg Family Fund
- Bailey Stein Fund
- James Stern Family Foundation Fund
- Robert Glen Stern Scholarship Fund
- Charles T. and Patricia Carry Stewart Fund
- Ann E. Stewart Memorial Scholarship Fund
- Stiller Family Foundation Fund
- Douglas Stockham Fund
- The Loy Anderson Miles Stone Foundation
- Richard and Lesley Stone Family Fund
- The Hans and Mary Stratmann Fund
- Susan R. & John W. Sullivan Fund for Martin County
- Sunburst Foundation Community Scholarship Fund
- Jack Taylor Fund for Abused and Neglected Children
- Arthur C. Tilley Memorial Scholarship Fund
- Toppel Family Fund
- Trimble Scholarship for Martin County Fund
- Ted Trimble Scholarship Fund for Vocational Training
- Sue Twyford Memorial Fund
- United Way of Palm Beach County Endowment Fund
- Alexander and Mildred Valuzis Fund
- Wendy and Royall Victor III Fund for Environment and Landmark Preservation
- VSA Florida - Palm Beach County Fund
- The Walden Fund
- Herbert Weber Fund
- Roberta and Stephen R. Weiner Scholarship Fund
- Fred P. and Sophia D. Weissman Unrestricted Fund
- The Weitz Company Scholarship Fund
- Rear Admiral Philip A. Whitacre Scholarship Fund
- White Hat Charitable Fund
- Cynthia A. Williams Fund
- Friends of the Gerald A. Williams, Esq. Law Academy
- Cliff Williams Youth Recreation Fund
- Williamson Pioneer Fund
- Ralph O. Wood Memorial Scholarship Fund
- Dave Yanis Scholarship Fund
- Robert Yates Charitable Fund
- Young Singers of the Palm Beaches Endowment Fund
- Youth Music Fund for Conserving Classical Music Education inspired by Alice Pyle Walker Maxey
- YWCA of Palm Beach County Endowment Fund
- Joseph Zimmerman Charitable Foundation Fund
- R. J. Zuckerberg Palm Beach Fund

# The **LEGACY SOCIETY**

## Legacy Society & Planned Giving

**The Legacy Society honors individuals and families who have made a lasting commitment to our community by making provisions in their estate plans to provide a legacy gift to the Community Foundation.**

Leaving a legacy can include bequests, retirement assets, charitable gift annuities, charitable remainder trusts, gifts of life insurance, or any other type of charitable planned gift.

You can establish a Designated Fund that benefits a specific nonprofit or a Field of Interest Fund that supports an area of interest or a Legacy Fund that documents how your assets should be distributed in perpetuity after your lifetime.

We also recognize those who at their passing leave their fund balance to the Community Foundation for our community based grantmaking.

Being a member of the Legacy Society gives donors the opportunity to belong to a select group of like-minded people who are committed to support the needs of our communities.



*Anson Beard and Lore M. Dodge*



*Susan Dahlberg Brocker, LaRue Dahlberg*

## LEGACY SOCIETY MEMBERS

Mr.\* and Mrs. Sheldon B. Ackerman  
Mr. Francis Xavier F. Altobello Jr.\*  
Estate of Mildred Baldwin  
Mr. and Mrs. Thomas Barrat  
Estate of Laurence E. Barreca  
Mr. Anson M. Beard, Jr.  
Mr. and Mrs. William E. Benjamin\*  
Mrs. Barbara Bishop Chapin  
Mr.\* and Mrs. Stig Bjork  
Ms. Danielle Blangy Cameron  
Mr. and Mrs. Thomas Blash\*  
Mr. and Mrs. Robert Bodington\*  
Mr. and Mrs. William H. Bohnett  
Estate of Sorrel Ross Bollet  
Estate of Milton J. Boone  
Mrs. Bradley Collins  
Estate of Mr. and Mrs. Harry Bronstein  
Dr. and Mrs. William J. Bryant  
Michael S. Buckner Esq.  
Estate of Robert A. Butler  
Estate of John A. Callahan  
Mrs. Robert Chapin  
Estate of Gwendolyn M. Cohen  
Mr. Julian Cohen\*  
Mrs. Bradley Collins  
Ms. Robin R. Cutler  
Mrs. Joseph DaCorte  
Mr.\* and Mrs. LaRue H. Dahlberg  
Mr. and Mrs. James R. Daleen



*Kathryn Fox, Sheila Kinman, Michelle Gurto*



Mr. and Mrs. David Darwin  
 Mr. and Mrs. James C. Davis  
 Estate of James H. Davis  
 Mr. John B. Dodge  
 Ms. Lore Moran Dodge  
 Dominique Trust  
 Ms. Margaret C. Donnelley  
 Mr. Alexander W. Dreyfoos Jr.  
 Ms. Carol DuBois  
 Mrs. Elizabeth H. Dudley  
 Dr.\* and Mrs. William Earnhart  
 Dr. and Mrs.\* Robert W. Eddleman  
 Ms. Mary D. Fisher  
 Ms. Kathryn Fox  
 Estate of Ernest Frank  
 Ms. Diane M. Freaney CPA  
 Mr. and Mrs. Barry H. Goldman  
 Mrs. Mary Jane Grant  
 Mr. and Mrs. Richard H. Grant Jr.\*  
 Mr. and Mrs. Michael Grossman  
 Ms. Barbara Groves\*  
 Mr. and Mrs. Kenneth L. Groves  
 Ms. Michele L. Gurto CPA  
 Mr. and Mrs. Gene J. Guttman\*  
 Mrs. Robert Handley\*  
 Dr. and Mrs. Vernon A. Harrington\*  
 Mr. and Mrs. Thornton M. Henry  
 Mr. and Mrs. Patrick Henry  
 Mrs. Eugene E. Heston  
 Estate of J. Peter Hoffman  
 Mr. and Mrs. Robert Hull  
 Estate of Marcelle Hull Littell Trust  
 Mr. and Mrs. Bradley A. Hurlburt  
 Mrs. Martha K. Husvar\*  
 Mr. Charles Kappert  
 Alfred and Elizabeth Kay\*  
 Mr. and Mrs. Harvey Kimmel  
 Mr. and Ms. Eric Kinman  
 Mr. and Mrs. James Kirkwood\*  
 Estate of Ilse Klassen  
 Mr. William F. Koch Jr.\*  
 Mr. and Mrs. William Kollmer  
 Dr. Marta R. Koltay Trust  
 Mr. Russell Kraus and Ms. Elaine Jeveli  
 Dr. and Mrs. Wilbur J. Kupfrian\*  
 Mrs. J. Hicks Lanier\*

Estate of Richard G. Lepeska  
 Estate of Lottie French Lewis  
 Brenda M. Magee, Ed.D.  
 Mr. Daniel J. Mahoney, Jr.\*  
 Ms. Maria Mamlouk  
 Mr. C. Charles Marran\*  
 Ms. Elizabeth 'Libby' Marshall MLA - LLC  
 Col\* and Mrs. John Marshall  
 Estate of Marie Graber Martens  
 Mr. Neil M. McCarthy and  
 Ms. Elizabeth W. Monaco  
 Ms. Connie McEvoy  
 Estate of John T. Ladue McGinty  
 Estate of Esther C. McShurley  
 Estate of Alma Lu Meerdink  
 Arthur I.\* and Sydelle F. Meyer  
 Mr. Ted J. Miller  
 Estate of Mabry M. Noxon  
 Mrs. Phillip D. O'Connell, Sr \*  
 Mr. and Mrs. Victor Oristano  
 Mr. Donald M. Paterson\*  
 Dr. Dorothy Adams Peck  
 Mr. and Mrs. Edwin Pedersen\*  
 Mrs. Anna Marie Peterson\*

Ms. Betty S. Price  
 The Honorable Edward Rodgers  
 Mr. Leon M. Rubin  
 Mr.\* and Mrs. Frederick Runkel  
 Ms. Lisa D. Russo  
 Mrs. Catherine Schmidt  
 Mrs. George F. Schrafft  
 Estate of Claire B. Schultz  
 Mrs. Joan Sherman\*  
 Mr. Allan E. Shore\*  
 Mr. and Mrs. James R. Smith\*  
 Mr. and Mrs. Eliot I. Snider  
 Mr. Edward W. Snowdon\*  
 Mrs. Bailey B. Sory  
 Mr. Harold Stern  
 Mrs. Charles T. Stewart  
 Mrs. Florence Trefry  
 Estate of Alexander and Mildred Valuzis  
 Estate of Herbert Weber  
 Frederick P. Weissman Trust\*  
 Ms. Cynthia A. Williams  
 Joseph Zimmerman Foundation II, Inc.

\* Deceased

## A Legacy Story

Lottie French Lewis turned her passions into an everlasting legacy thanks to a recommendation from her attorney Dan Hanley and the Community Foundation. Mrs. Lewis was passionate about supporting causes related to prevention and early detection of cancer, Alzheimer's disease research and providing quality education for all ambitious students.



Lottie French Lewis passed away in 2009, but her legacy lives on. By establishing a donor advised fund at the Community Foundation, her wishes of supporting the community in a way that lasts forever are coming true. Lottie outlined her plans ahead of time and her fund was structured with the flexibility to adapt and stay at the forefront of future advances. Thanks to the Lottie French Lewis Fund, her life's passions and charitable intent are supported in a manner that will impact our community long into the future.



# FINANCIAL Overview

The Community Foundation holds itself to **high standards of financial management and transparency** and **operates efficiently** for the interest of our community.

The Audit Committee, together with the Foundation's management and staff ensures rigorous financial controls and high administrative standards.

The Foundation's audited financial statements for 2016-2017 are presented below. We worked closely with our independent auditors, Holyfield & Thomas, LLC, to provide an accurate representation of the Foundation's stability as an organization.

## STATEMENT OF FINANCIAL POSITION as of June 30

ASSETS	2017	2016
Cash and Cash Equivalents	4,068,125	5,254,183
Contributions and Bequest Receivable	-0	16,456
Prepaid Expenses and Other Assets	212,318	261,867
Investments	148,882,868	139,635,937
Land, Building and Equipment, Net	7,734,256	7,947,392
<b>Total Assets</b>	<b>160,897,567</b>	<b>153,105,835</b>

## LIABILITIES & NET ASSETS

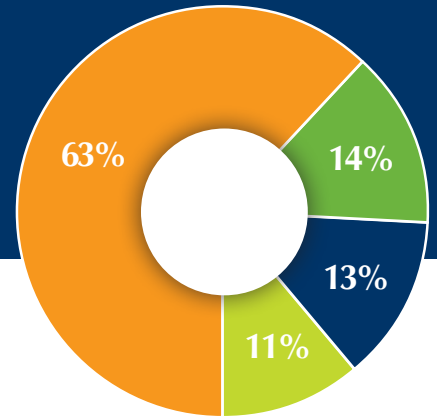
Accounts Payable and Accrued Expenses	290,867	378,975
Agency Payable	2,115,363	1,019,322
Grants and Scholarships Payable	5,191,996	6,299,339
Bond Issue Payable	6,310,613	6,805,250
<b>Total Liabilities</b>	<b>13,908,839</b>	<b>14,502,886</b>
<b>Net Assets</b>	<b>146,988,728</b>	<b>138,602,949</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>160,897,567</b>	<b>153,105,835</b>

## STATEMENT OF ACTIVITY as of June 30

Revenues	2017	2016
Contributions, Grants and Pledges	6,334,951	9,248,171
Investment Income and Other Changes	13,711,667	(4,514,434)
Rental and Other Income	222,247	242,942
Other Gain (Loss)	352,965	99,498
<b>Total Revenues</b>	<b>20,621,830</b>	<b>5,076,177</b>

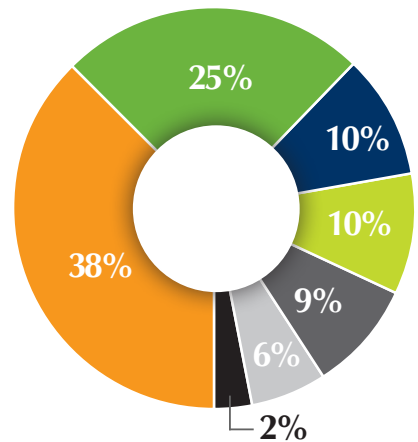
## Expenses

Grants, Net of Cancellations and Returns	8,859,681	8,601,677
Programs and Support Services	3,376,370	3,201,396
<b>Total Grants, Programs &amp; Support Services</b>	<b>12,236,051</b>	<b>11,803,073</b>
<b>Change in Net Assets</b>	<b>8,385,779</b>	<b>(6,726,896)</b>
<b>Net Assets at Beginning of Year</b>	<b>138,602,949</b>	<b>145,329,845</b>
<b>Net Assets at End of Year</b>	<b>146,988,728</b>	<b>138,602,949</b>



## GRANTS BY FUND TYPES

Restricted . . . . .	\$5,762,328
Scholarship . . . . .	\$1,324,668
Unrestricted . . . . .	\$1,168,268
Supporting Org. . . . .	\$1,023,974



## ASSETS BY FUND TYPES

Donor Advised . . . . .	\$55,394,485
Field of Interest . . . . .	\$36,263,814
Special Purpose . . . . .	\$14,098,014
Scholarship . . . . .	\$14,026,859
Unrestricted . . . . .	\$13,839,790
Supporting	
Organization . . . . .	\$9,431,451
Designated . . . . .	\$3,934,314

## Investing into the Future of Local Nonprofits

The Community Foundation for Palm Beach and Martin Counties is laser-focused on its goal to endow the future of its local nonprofits. In two years, its matching challenges add up to an incredible \$691,000 invested into the future of local nonprofits.

This fiscal year, the Community Foundation invested a total of \$441,000 into nonprofit endowments. \$400,000 was awarded to 16 nonprofit organization winners of the Forever Nonprofit Endowment Challenge. These 16 501(c)(3) organizations will receive \$25,000 each in matching funds to establish a permanent endowment with the Community Foundation. The funds for this initiative come from the John D. and Catherine T. MacArthur Fund and the Marie Graber Martens Fund.

This challenge grant is built on the success of last year's challenge from the Foundation, the Forever Arts and Culture Endowment Challenge. Last year's challenge, exclusively for arts and culture organizations, awarded ten nonprofits with matching grants of \$25,000 each to establish a permanent endowed fund at the Community Foundation for a total investment of \$250,000.

**The Forever Nonprofit Endowment Challenge helped these organizations establish new endowment funds at the Community Foundation:**

- Armory Art Center
- Boca Raton Museum of Art
- CROS Ministries
- Cultural Council of Palm Beach County
- Delray Beach Public Library
- Education Foundation of Martin County
- Education Foundation of Palm Beach County
- Habitat for Humanity, Palm Beach County
- HomeSafe
- Legal Aid Society of Palm Beach County, Inc.
- Palm Beach State College
- Quantum House
- The Historical Society of Palm Beach County
- United Way of Palm Beach County
- Urban League of Palm Beach County, Inc.
- YWCA of Palm Beach County



*“Building endowment for the community is our expertise,”*

*says Brad Hurlburt*

*“These endowments provides these organizations with future stability and a foundation from which to grow – one not contingent on the success of current or future fundraising efforts. It’s an investment into our community.”*

# INVESTMENT Overview

## INVESTMENT MANAGEMENT

The Investment Committee establishes investment policy and monitors individual investment managers and their performance on a quarterly basis. Beginning July 1, 2017, the Investment Committee is now assisted by Morgan Stanley, an independent consulting firm.



### Investment Committee

Anson Beard, Jr. – Chair  
Roy Zuckerberg  
J. Ira Harris  
William M. Matthews  
Peter Matwiczuk  
Eliot Snider  
Douglas Stockham  
Christopher Storkerson

### Finance Committee

Steven Templeton - Chair  
Anson Beard, Jr.  
George Elmore  
Andrew Kushner  
Jane Mitchell  
Lisa Morgan

### Audit Committee

Christopher Storkerson - Chair  
George Elmore  
Christina Macfarland  
Peter Matwiczuk  
Andrew Kushner

### INTRODUCING VICTOR LIVINGSTONE FROM

## Morgan Stanley



The Foundation welcomes Victor Livingstone with Morgan Stanley, our new Investment Manager effective July 1, 2017.

Victor is a managing director and senior institutional consultant with Morgan Stanley's Private Wealth management division. He is based in Morgan Stanley's Boston Complex and leads a team of four investment professionals.

Victor and his team provide institutional consulting and advisory services to a wide range of clients including nonprofit organizations, endowments, foundations

and families. The team oversees investment assets in excess of \$3 billion including traditional equity, fixed income and alternative investments.

Led by Victor Livingstone, the Morgan Stanley will operate within the Investment Policy Statement and asset guidelines established by the Investment Committee.

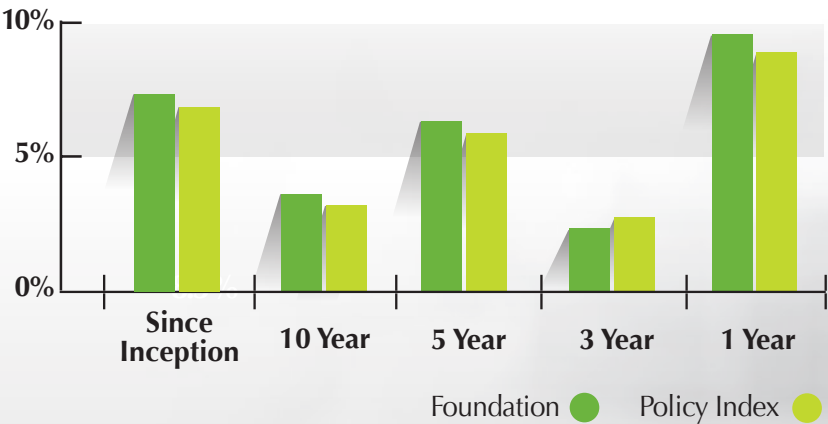




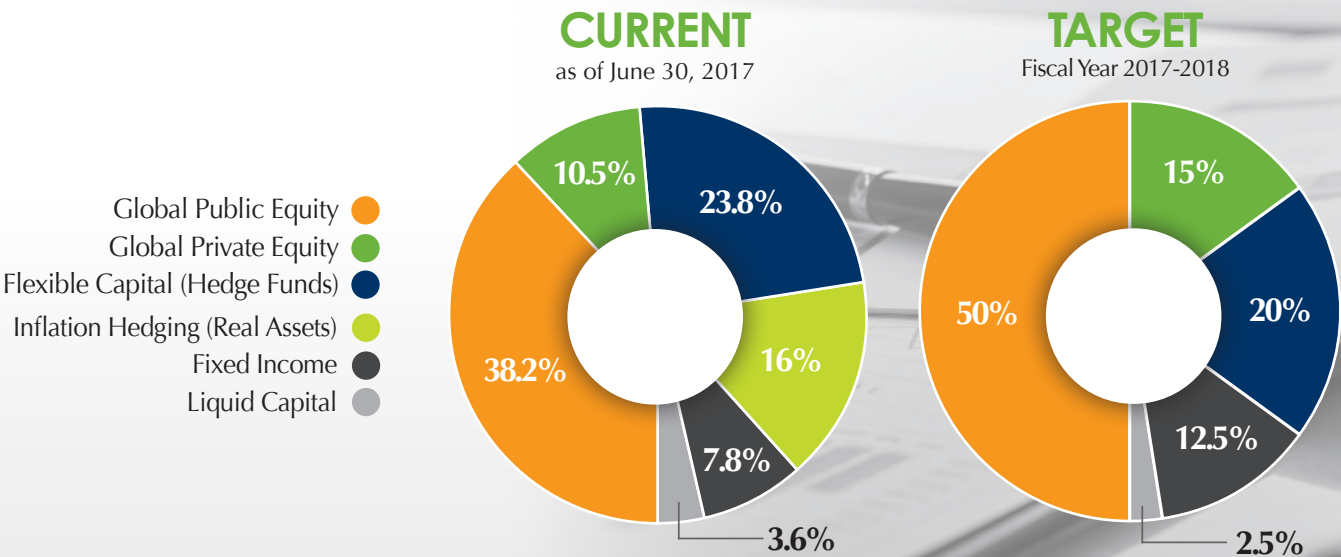
# INVESTMENT PERFORMANCE

as of June 30, 2017

	Foundation	Policy Index
Since Inception	7.1%	6.7%
10 Year	3.0%	2.8%
5 Year	6.2%	5.9%
3 Year	2.1%	2.3%
1 Year	9.8%	8.9%



# ASSET ALLOCATION



# SPECIAL Events



**Above:** Elizabeth Matthews, Charles James, Christina Macfarland **Left:** Jack Lighton, Cheryl Houghtelin, Mark Perry, Tony Brown



Judy Keller, John Keller, Brad Hurlburt, Mebbly Brown

**Photo credit:**  
Tracey Benson Photography



## DONOR EDUCATION AT MANATEE LAGOON

Donors and fundholders packed the house at the beautiful FPL Manatee Lagoon and heard from some of our environmental grantees talk about the impact of Community Foundation grants. Speakers included representatives from Florida Oceanographic Society, John D. MacArthur Beach State Park, Loggerhead Marinelifelife Center and Florida Fishing Academy. This event was generously sponsored by Board member Andrew Kushner.





# FOUNDER'S A W A R D

## FOUNDER'S AWARD LUNCHEON



*Alberto Ibarguen*

The fourth annual Founder's Award Luncheon kicked off on May 24th at the Kravis Center's Cohen Pavilion.

Keynote speaker Ibarguen is president and CEO of the Knight Foundation. The Knight Foundation is a national foundation with strong local roots. It invests in journalism, the arts, technology and in the success of cities where brothers John S. and James L. Knight once published newspapers – including our very own Palm Beach County. He discussed the importance of community engagement and detailed some of the projects Knight is working on in Palm Beach County and across the nation, including use of artificial intelligence and efforts to innovate and foster change.



**PNC BANK**

Premier Sponsor



*Cressman Bronson, Stephanie Pew, John Pew, Bradley Hurlburt, Will Matthews, Julie Cummings, J.B. Murray*



*Margaret May Damen, Alexander Dreyfoos*



*Nancy Maio, Jeremy Johnson, Bill Meyer, Sunni Johnson*

**Photo credit:** LILA Photo



## WOMEN AND PHILANTHROPY

On November 15th, more than 150 women gathered at the Flager Museum at the inaugural Women and Philanthropy: A Powerful Force in the World with special keynote speaker Melanie Sabelhaus.

Melanie spoke about the importance of women in philanthropy and society. Her inspiring presentation detailed the journey and history of charitable women and the excitement of work yet to be done.

Women and Philanthropy was generously hosted by Board member Susan Stautberg.

**Left:** Akereya Wilson, Angela Clarke, Susan Stautberg, Melanie Sabelhaus, Sherry Barrat, Geneva Boynton, Marian Stubbs

**Photo credit:** Nicholas Mele



# SPECIAL Events



Community Foundation Gala

## Keeping it Local

### GALA

We hosted our 'Keeping It Local' Gala at The Breakers on February 10. Guests enjoyed dinner, dancing and a silent auction of a piece by world-renown environmental artist Chris Leidy, grandson of Lilly Pulitzer Rousseau. In total, the gala raised more than \$400,000 for the Community Foundation's charitable leadership work.

Grand honorary chairs for the Community Foundation Gala were Lore M. Dodge and David G. Ober. Honorary chairs included Christina Macfarland, Frances Peter and Caroline Rafferty. Co-chairs were Kathleen Emmett Hager, Karyn G. Lamb, Missy Savage and Carrie Murray.

*Above:* Kathleen Emmett Hager, Karyn Lamb, Carrie Murray, Missy Savage  
*Top Right:* Debbie and Anson Beard, *Middle Right:* Todd and Frances Peter,  
*Bottom Right:* Nicholas and Caroline Rafferty

Photo credit: LILA Photo







# What Do You Care About?

## Hans and Mary cared about women and children.

Hans and Mary Stratmann cared about our local women and children, especially families struggling with homelessness. They left a bequest in their will to help women get the help they need. They trusted the Community Foundation. And we make sure their passions live on.



An excellent way to support Community Foundation for Palm Beach and Martin Counties' mission is to leave us a bequest in your will or living trust. Making a gift by bequest like the Stratmanns allows you to continue to use the property you will leave to charity during your life and enables you to leave a lasting legacy.

A bequest is generally a revocable gift, which means it can be changed or modified at any time. Donors can choose to designate that a bequest be used for a general or specific purpose so you have the peace of mind knowing that your gift will be used as intended. Bequests are exempt from federal estate taxes. If you have a taxable estate, the estate tax charitable deduction may offset or eliminate estate taxes.

*The Stratmann Fund supports nonprofit organizations like Burckle Place, the only supportive housing program in Palm Beach County designed exclusively for single, homeless women.*



# MEET Your Team

## ADMINISTRATIVE / FINANCE



**Bradley Hurlburt**



**Gloria Ortega Rex**  
CPA, MBA



**Alba Modes**



**Sandra Mari**

**Bradley Hurlburt**  
President & CEO  
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**Gloria Ortega Rex CPA, MBA**  
Executive Vice President & CFO  
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**Alba Modes**  
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**Sandra Mari**  
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## COMMUNITY INVESTMENT



**Renee Constantino,**  
MPA



**Daryl Houston**



**Stephanie Mejias**

**Sandra Reid\***  
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**Renee Constantino, MPA**  
Vice President for Community Investment  
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**Daryl Houston**  
Community Investment Officer  
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**Stephanie Mejias**  
Grants and Scholarship Administrator  
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## DEVELOPMENT & DONOR SERVICES



**Sheila Kinman, CAP®**



**Kati Erickson**



**C. Bonnie Mitchell**



**Anne Allieri**

**Sheila Kinman, CAP®**  
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**Kati Erickson**  
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**C. Bonnie Mitchell**  
Donor Services Officer  
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**Anne Allieri**  
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## MARKETING & COMMUNICATIONS



**Corrie Keller**

**Corrie Keller**  
Senior Director of Marketing  
& Communications  
ckeller@cfpbmc.org • 561.340.4510

*\*not pictured*



Excellence. Accountability. Impact.™





# Nine Reasons to Partner With Us:

**JOY OF GIVING** – donors can give anywhere, any time, in any amount!

**WORLD-CLASS SERVICE** – it is our pleasure to assist you in making your philanthropy more rewarding, any way we can.

## **FLEXIBLE & CUSTOMIZED**

**GIVING** – our team of professionals can help you achieve anything you wish, anywhere in the world with your philanthropy.

**COMMUNITY EXPERTISE** – from affordable housing to education, from the arts to the environment, our team has the local expertise to make your charitable gifts more impactful.

**INVESTMENT PERFORMANCE** – a number of investment options provide you with greater asset class diversification; you may also continue to use your own investment manager.

**LEGACY PLANNING** – as our partner, you may specify the charities you wish to direct your philanthropy to in the future, for many generations.

**STEWARDSHIP** – as a public entity led by the leaders of our community, your philanthropic intent will be protected.

**TAX BENEFITS** – partnering with us allows you the greatest tax benefits provided, significantly higher than charitable gifts to a private foundation. The Community Foundation is also an attractive alternative to having a private foundation.

**CHARITABLE** – we offer opportunities for donors to co-invest on initiatives with the Foundation. Ask us how!

*"The great use of a life is to spend it for  
something that outlives it."*

– William James



Your Philanthropy  
Our Community  
Better Together

**office** 561.659.6800 **fax** 561.832.6542  
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West Palm Beach, FL 33401  
**web** [yourcommunityfoundation.org](http://yourcommunityfoundation.org)  
**facebook** /cfpbmc **twitter** @cfpbmc



Excellence. Accountability. Impact.™