Advisory Council
Fall Meeting

Community Room
October 25, 2018
Welcome

Jim Bass, Chair, CFT Board of Trustees
Monica Egert Smith
Chief Relationship Officer
CFT Fiscal Update
Where Giving Thrives

By the numbers:

• $1.13 billion in assets as of June 30, 2018

• 30% increase in new donor-advised funds, as well as overall gifts to DAF’s

• $107 million granted in FY18

• 1,000 funds, including 600+ active donor-advised funds

• Largest community foundation in Texas
Introducing CFT’S Social Impact Fund

• **Fund Inception:** 10/1/2018
• **Initial Investment:** $10 million AUM
• **Target Allocation:** 60% Equity / 40% Fixed Income
• **Estimated Management Fees:** 0.20% - 0.25%
• **Target Return:** 6-8% annualized across a full market cycle
New Faces in Collin County

Sarah Beeks Higdon, MBA, CAP®
Director of Charitable Giving, Collin County
214.750.4247

Jeri Chambers
Donor Relations Officer, Collin County
214.750.4117

New Collin County Office!

Communities Foundation of Texas
2401 Internet Blvd., Suite 101,
Hall Park G1
Frisco, TX 75034
Side by Side, We’re Building a Lasting Legacy

EMERGING LEADERS IN PHILANTHROPY at COMMUNITIES FOUNDATION of TEXAS
Side by Side, We’re Building a Lasting Legacy
10 Years Strong: North Texas Giving Day

2018 OVERALL RESULTS

NORTH TEXAS GIVING DAY 2018

$48 MILLION
RAISED FOR
2,690 NONPROFITS
THROUGH
157,403 GIFTS

160,789 TOTAL WEBSITE VISITORS

$260
AVERAGE GIFT

$15,200
raised per nonprofit

118 GIFTS
per minute

$31,900
per minute

81,333
DONORS MADE A GIFT!
THE POWER OF VOLUNTEERS

NORTH TEXAS GIVING DAY DONORS PLEDGED
436,000 HOURS WHICH IS EQUIVILENT TO
212 FULL TIME EMPLOYEES VALUED AT
$10.5 MILLION

value of a volunteer hour = $24.14
Advisory Council

PURPOSE:
Members help advance CFT’s work by fostering an understanding of the foundation as a trusted partner for philanthropic planning and giving, community knowledge and collaboration.

TERMS & MEETINGS:
The Advisory Council members are asked to serve three-year, renewable terms. The Advisory Council typically meets twice a year as a group and individually with Donor Relations staff throughout the year.
Welcome New Advisory Council Members

Jonathan Blum, Polsinelli
Kevin Bryant, Crow Holdings
Todd Carlton, BNY Mellon
Jamie Carter, Haynes & Boone, LLP
Kristi Francis, Francis & Associates CPA’s
Todd Healy, Texas Financial Partners
Peter King, Geary, Porter & Donovan, P.C.
Jennifer Lan, Haynes & Boone, LLP

Norman Lofgren, Gray, Reed & McGraw, LLP
Mark LaRoe, US Trust
Michael Meadows, Westwood Trust
Tracey Spivey, Montgomery Coscia Greilich, LLP
Rick Szelc, Neuberger Berman, LLC
Tresi Weeks, Weeks Law Firm
Genevra Williams, Mendrygal Law, PLLC
Donor Relations Team

Carolyn A. Newham, JD
Senior Director, Donor Relations & Fund Administration

Sarah Beeks Higdon, MBA, CAP
Director of Charitable Giving, Collin County

Geri Jacobs, ChFC, CLU
Director of Charitable Gift Planning

Kathryn McGill, CAP
Advisor Relations Officer

Jeri Chambers
Donor Relations Officer, Collin County
Creating Impact:
A Conversation with

Beverly Brown
and Ronnie McClure

Moderator: Kathryn McGill
Carolyn Newham
Senior Director Donor Relations
& Fund Administration
CFT Services for Individuals and Families

- Donor-Advised Funds
- Scholarship Funds
- Charitable Advising
- Legacy Planning

DONORS
Establish Fund & Recommend Grants

CFT
Invest & Grow Funds
Advise on Charitable Impact
Due Diligence on Nonprofits

NONPROFITS
Receive grants & guidance from CFT
CFT Services for Businesses

- Customized Giving Strategy Development
- Business-Advised Funds
- Employee Giving
- Employee Service Events
- Sponsorships
October 30: Diversity in Philanthropy: Understanding, Engaging and Networking the High Net Worth Donors of Color

Register:
www.cftexas.org/faces-of-giving
2019 CFT/SMU Professional Seminar

May 7, 2019: CFT/SMU Professional Seminar

Featuring Samuel A. Donaldson

Before joining the Georgia State Law faculty in 2012, Samuel A. Donaldson, professor of law, was at the University of Washington School of Law for 13 years. During his tenure at the University of Washington, he was a five-time recipient of the Philip A. Trautman Professor of the Year award from the law school’s Student Bar Association. He served for two years as an associate dean for academic administration and six years as the director of the law school’s graduate program in taxation. Donaldson teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law and professional responsibility. Donaldson is an academic fellow of the American College of Trust and Estate Counsel and a member of the Bar in Washington, Oregon, and Arizona. Among his scholarly works, Donaldson is a co-author of the popular West casebook, Federal Income Tax: A Contemporary Approach, and a co-author of the Price on Contemporary Estate Planning treatise published by Wolters Kluwer. He has served as the Harry R. Horowitz Visiting Professor of International Law at Northwestern University and a visiting assistant professor at the University of Florida Levin College of Law.

Tuesday, May 7, 2019
8:00 a.m. to 11:30 a.m.

Location: Southern Methodist University

Register: www.cftexas.org
Thank you