

# EMPOWER

Evolving How Money Works to Make a Difference

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Excellence, Accountability, Impact.™

## A LETTER FROM OUR CHAIRMAN →

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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 BOARD OF DIRECTORS →



**CLIFF JONES**  
**CHAIRMAN**

Edward Jones



**DAVID WILLIAMS**  
**VICE-CHAIRMAN**

Centerpoint Medical  
Center



**BARBARA  
KOIRTYOHANN**  
**SECRETARY**

Hallmark (ret)



**MELANIE  
MOENTMANN**  
**TREASURER**

DST, Inc.



**DAVID JETER**  
**IMMEDIATE PAST  
CHAIRMAN**

Jeter, Rains & Byrn,  
L.C. (ret)



**DAVID BOWER**  
Populous



**CINDY CAVANAH**  
Cable Dahmer  
Chevrolet (ret)



**TOM DUVALL**  
truckmovers.com



**JUDY FORRESTER**  
Dana Forrester  
Watercolors



**ELEANOR FRASIER**  
Community  
Volunteer



**LINDA GERDING**  
Community  
Volunteer



**PATRICIA HATLEY**  
Blue Springs School  
District (ret)



**HELEN HATRIDGE**  
Community  
Volunteer



**KATHY HUGHEY**  
Community  
Volunteer



**ADAM  
KLIETHERMES**  
Edward Jones



**GEORGE KOEPF**  
Edward Jones



**TRACEY MERSHON**  
Mershon &  
McDonald



**KIRK NOOKS**  
Metropolitan  
Community College  
Longview



**TINA PARSLEY  
HUGHES**  
Lighthouse Legal



**STEVE POTTER**  
Mid-Continent  
Public Library



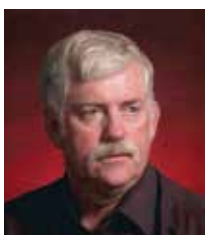
**STAN SALVA**  
Public Office (ret)



**KAREN SCHULER**  
GEHA



**GLORIA SOLIS**  
Saint Luke's East  
Hospital



**MONTIE TRIPP**  
Garney  
Construction (ret)



**JEFF WALTERS**  
Blue Ridge Bank  
and Trust



**LYNETTE WHEELER**  
Truman Medical  
Center Lakewood



**CANDY WHITE**  
Community  
Volunteer



**JONATHAN ZERR**  
Kappe & Willerth,  
LLC

## 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 Cassiday Watkins, MFA, Assistant Director of Programs & Donor Services

Lynn Oltmanns, Administrative Assistant

Cheryl Klotz, Office Manager

Beverly Powell, CPA, Chief Financial Officer





# GROWING FUTURE PHILANTHROPISTS

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 Bocker  
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

## 24 GRANT

PROPOSALS REVIEWED AND 24 ON-SITE VISITS

## (\$112,600)

WORTH OF REQUESTS

### 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



FILL THOSE TRUCKS COLLECTED

## 50,000

WORTH OF DONATED FOOD ITEMS FOR RAYTOWN  
EMERGENCY ASSISTANCE PROGRAM, LEE'S SUMMIT SOCIAL  
SERVICES AND COMMUNITY SERVICES LEAGUE



## 973 HOURS

COMMUNITY  
SERVICE

## \$2,600 TOTAL

GRANTS AWARDED



ELIZABETH HILL MCCLURE SCHOLARSHIP AWARDED TO

## MARIAH GILBERTSON



HENRI E. GOETTEL YOUTH IN PHILANTHROPY AWARDED 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](http://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

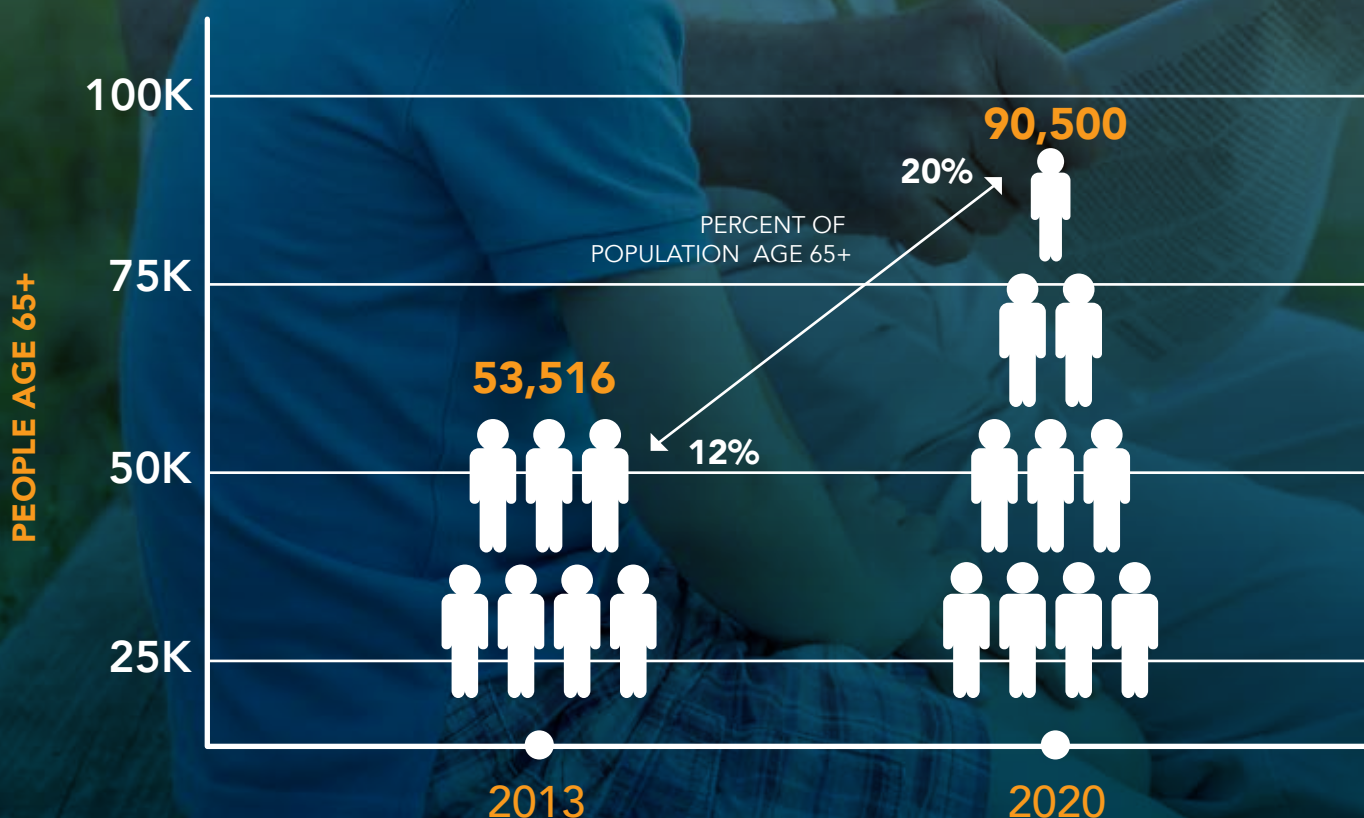
- Actively serve on the Advisory Board and chair their Civic Engagement Committee.
- Connecting local cities to MARC’s Community for All Ages Recognition program with Raytown, Independence, Blue Springs and Lee’s Summit participating.
- Supporting efforts to bring Age Mastery Program of the National Council on Aging to our community.
- Providing Civic Engagement laboratory by sharing our learning from our Civic Engagement research with the metro region.



# DEVELOPING A COMMUNITY FOR ALL AGES IN 2017

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                   | YEAR 25  | YEAR 50  |
|--------------------------|--|--|
|                          | \$186,000<br>IN CUMULATIVE GRANTS<br>AND SERVICES* | \$541,000<br>IN CUMULATIVE GRANTS<br>AND SERVICES* |
| \$100,000<br>LEGACY GIFT | \$190,000<br>FUND BALANCE                          | \$360,000<br>FUND BALANCE                          |

\*ASSUMES 5% ANNUAL PAYOUT AND 8% RATE OF RETURN

# 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 Droege  
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 Stille  
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





## GIVING FOR THE GREATEST GOOD

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. Koirtzohann 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

112 GRANT  
REQUESTS

TOTAL DOLLAR AMOUNT OF  
GRANT REQUESTS:

\$915,079



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

53 TOTAL

NUMBER OF GRANT REWARDS



COMMUNITY  
BETTERMENT

3 AWARDS TOTALING:

\$7,450

\$294,034

TOTAL DOLLAR AMOUNT OF  
GRANT REWARDS.



## 2016 COMMUNITY GRANTS →

### 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.

### JEWISH 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. Koirtzmann Family Fund and the Youth Advisory Council.

### MARILLAC

#### **Expressive Therapies for Marillac Blue Springs Day Treatment School - \$1,150**







EVOLVING HOW MONEY WORKS TO...

**CHANGE LIVES AROUND THE WORLD.**

## HELEN FRENCH

Charitable Gift Annuity Donor • Donor Advised Fund Holder  
Community Activist • Independence Resident

"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."

**METROPOLITAN COMMUNITY COLLEGES  
FOUNDATION**

**2016 MCC Longview Literary Festival - \$1,500**

**METROPOLITAN ORGANIZATION TO COUNTER  
SEXUAL ASSAULT**

**Project Aware: Child Sexual Abuse Prevention  
and Education - \$4,000**

Partial funding provided by the Junior Service League of  
Independence.

**MISSOURI COLLEGE ADVISING CORPS**

**Connecting the Dots: Summer Support to Help  
Suburban Jackson County Students' Goals of College  
Become a Reality. - \$15,000**

**MUSIC-ARTS INSTITUTE**

**The Young MAIsterSingers - \$3,500**

Partial funding provided by the Samuel W. Edmunds  
Charitable Fund.

**MUSIC-ARTS INSTITUTE**

**Music/Arts Institute Scholarship Program - \$10,000**

**NORTHWEST COMMUNITIES DEVELOPMENT  
CORPORATION**

**Transportation - \$3,000**

Partial funding provided by the KC Metro Men's Chorus.

**PLAY TO LEARN MINISTRIES**

**Play to Learn Preschool - Roots and Wings  
Program - \$3,800**

Partial funding provided by the KC Metro Men's Chorus  
and the Cliff and Diane Jones Foundation.

**POWELL GARDENS**

**Good To Grow - \$10,000**

**POWERHOUSE THEATRE FOUNDATION**

**Enchanted Forest - \$3,000**

Partial funding provided by the Dave and Connie Mayta  
Charitable fund.

**RACHEL HOUSE**

**Client Service Paperless Project - \$1,280**

Partial funding provided by the KC Metro Men's Chorus.

**RAINBOW CENTER FOR COMMUNICATIVE  
DISORDERS**

**How Does Our Garden Grow - \$5,000**

Partial funding provided by the Youth Advisory Council.

**RAYTOWN ARTS COUNCIL**

**Raytown Community Band Instrument and Equipment  
Improvement Project - \$2,850**

Partial funding provided by the Linda and Mike Gerding  
Family Fund.

**RAYTOWN EMERGENCY ASSISTANCE PROGRAM**

**Birds & Baskets 2016 - \$2,463**

Partial funding provided by the Junior Service League of  
Independence.

**REDISCOVER**

**Health Care Home for Kids - \$5,000**

Partial funding provided by the KC Metro Men's Chorus  
and the Samuel W. Edmunds Charitable Fund.

**SHEPHERD'S CENTER OF RAYTOWN**

**Treasury Operations Support - \$3,000**

**SOUTHEAST ENTERPRISES**

**2016 - 2017 Holiday Light Recycling Drive - \$3,600**

Partial funding provided by the KC Metro Men's Chorus  
and the Linda and Mike Gerding Family Fund.

**ST. LUKE'S EAST HOSPITAL**

**Saint Luke's East Hospital Athletic  
Heart Clinic - \$6,950**

**SUGAR CREEK COMMUNITY DEVELOPMENT  
CORPORATION**

**Go Sugar Creek - \$1,000**

**THE FAMILY CONSERVANCY**

**Student Assistance Program - \$5,000**

Partial funding provided by the KC Metro Men's Chorus,  
the HMF Beaudoin Family Foundation and the Youth  
Advisory Council.

**THE SUMMIT CHURCH (LEE'S SUMMIT UNITED  
METHODIST CHURCH)**

**The Summit Lunch Program - \$5,000**

**TNC COMMUNITY**

**Community Integration - \$2,500**

**UNIVERSITY OF MISSOURI - JACKSON COUNTY  
EXTENSION**

**Independence Robotics 4-H  
Afterschool - \$13,000**

**UPLIFT INDEPENDENCE**

**Neighborhood Dinner - \$1,500**

Funding provided by the Junior Service League of  
Independence.





# LEADING THE WAY FOR CHARITABLE GIVING IN OUR COMMUNITIES

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.

## DESIGNATED FUNDS

SUPPORT ONE OR MORE OF YOUR PREFERRED CHARITIES BY CONNECTING WITH LOCAL NONPROFITS WHO PARTNER WITH THCF TO BUILD THEIR ENDOWMENTS.

- Arabia Museum Foundation Fund
- Association of Fundraising Professionals Mid-America Chapter Operating Fund
- Bates County Historical Society Acorn Endowment Fund
- Bingham-Waggoner Historical Society Fund
- Blue Springs City Theatre Foundation Fund
- Blue Springs Historical Society, Inc. Fund
- Blue Springs South Athletics Fund
- Boys and Girls Clubs Fund
- Donna G. Bullock Family Fund
- Tom Cairns Endowment Fund
- Cancer Action Fund
- Cass County Historical Society
  - Cass County Genealogical Society Endowment
  - Cass County Historical Society Quasi-Endowment

- Irene Pippit Trust Fund
- Beverly A. Cathcard Donor-Advised Endowment
- Earl Kenneth Cavanah Donor Advised Endowment Fund
- Center for North American Herpetology (CNAH)
  - The Suzanne L. and Joseph T. Collins Fund
- Operating Reserve Fund
- Center For Conflict Resolution
  - Center for Conflict Resolution Endowment
  - Center for Conflict Resolution Short Term Investment Fund
- Center Place Educational Foundation General Fund
- Child Abuse Prevention Association General Endowment Fund
- Citizens for the Archives Fund

|  |   |
|--|---|
| City of Blue Springs   | First Baptist Church of Independence                  |
| Vesper Hall General Fund   | Endowment Fund  |
| Vesper Hall Nutrition & Homebound Fund                               | Myrtle Mingle Music Fund                              |
| City of Independence   | Non-Endowed Fund                                      |
| Animal Shelter Replacement Fund                                      | First Presbyterian Church of Lee's Summit             |
| Fire Safety Equipment Fund   | Ebenezer Fund   |
| Friends of Truman Depot Endowment                                    | Endowment Fund  |
| Friends of Parks & Recreation  | Information Technology Fund                           |
| George Owens Nature Park   | Reserve Fund  |
| Palmer Center Senior Services Enhancement Fund                       | Gift of Life  |
| Palmer Senior Center Endowment                                       | Non-Endowed Fund                                      |
| McCoy Park All Inclusive Play Project Fund                           | Quasi Endowed Fund                                    |
| Pioneer Woman Statue Endowment                                       | Graceland University Fund                             |
| Police Equipment Enhancement & Improvement Fund                      | Grain Valley School District Foundation               |
| Sermon Memorial Room Endowment                                       | A Plus Fund   |
| Sermon/Old Spring Project Endowment                                  | Athletics Fund  |
| Sister City Fund   | Classroom Technology Fund                             |
| Truman Memorial Building Restoration Fund                            | General Fund  |
| Truman Memorial Walking Trail Fund                                   | Instrumental Music Fund                               |
| Waggoner Memorial Endowment Fund                                     | Library Resources Fund                                |
| George H. Collings Memorial Endowment for Palmer Center              | Outdoor Classroom Fund                                |
| Community of the Good Shepherd (dba Alternative Opportunities, Inc.) | Robotics Program Fund                                 |
| Adolf Heine Memorial Fund  | Harrisonville Parks and Recreation Foundation         |
| Community of the Good Shepherd Operating Reserve Fund                | HealthEd Connect Fund                                 |
| Community of the Good Shepherd Fund                                  | Heart of America Chorus                               |
| Community Services League  | Endowment Fund  |
| Emergency Assistance Fund  | The KC Chapter of SPEBSQSA, Inc. Fund                 |
| Endowment Fund   | Heart of America Council, BSA/Blue Elk Endowment Fund |
| Michelle A. Schumacher Memorial Fund                                 | Heritage Philharmonic Endowment Fund                  |
| Non-Endowment Fund   | Hillcrest Ministries of Eastern Jackson County        |
| Comprehensive Mental Health Services                                 | Endowment Fund  |
| Client Services Fund   | Hillcrest Ministries Fund                             |
| Foundation, Inc. Fund  | Historical Society of Lee's Summit                    |
| Cultural Arts Coalition of Eastern Jackson County                    | Hope House  |
| Operating Reserve  | Anonymous Endowment Fund                              |
| Operating Money Market Fund  | Endowment Fund  |
| Developing Potential Endowment Fund                                  | M. E. Hurt Endowment Fund                             |
| Orena D. Dorsch Religious Ministries Endowment Fund                  | Shaunda L. Thomas Foundation                          |
| Drumm Farm Center for Children - Educational Enrichment Endowment    | Independence Youth Court Fund                         |
| Eastern Jackson County Youth Court Fund                              | Interactive African Missions Fund                     |
| Family Conservancy 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.**

Blue Springs Jaycees Breaking New Ground Fund  
Blue Springs Parents Club  
James D. Browning Endowment Fund  
Bryant School and Neighborhood Playground Fund  
Dr. Michael J. Bubalo Memorial Fund  
Charitable Reinvestment Foundation Fund  
Clean Air Don A. Potts Award Fund  
Discover ED Foundation Fund  
Noel & Carolyn Fulkerson Student Benefit Fund  
Grandma's Alzheimer Fund  
Darrell Hein Memorial Eagle Scout Project  
Ian's Fund for Testicular Cancer Awareness  
Independence Rotary Carnival Fund  
Melvin Jones Eye Fund  
Kansas City Theater Foundation  
KCMPRDA Fund  
Lee's Summit Kiwanis Club Fund

Lee's Summit Missouri Municipal Building Authority, Inc.  
Legacy Foundation Fund  
Lions Eye Fund  
Gary Martinette Award  
Mayor's Prayer Breakfast Fund  
Missouri Table & Chair Charitable Fund  
Open Arms Foundation Fund  
Professional Development Network Fund  
Progress Independence Fund  
Dick Puhr Fund for Athletes  
Revolving Rehabilitation Loan Fund  
Rolfe Bridge Education Fund  
Third World Sewing Partnership Fund  
United Nations Peace Memorial Fund  
Uplift Independence  
Veterans Way Memorial Fund

## 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.**

Dorothy D. Bay Donor Advised Fund  
Big Piney Fund for Social Ministry  
Beverly A. Cathcard Charitable Endowment  
Family Literacy Endowment Fund  
Heartland Arts Alliance Fund  
Margaret E. Hurt Endowment Fund  
IRHC Community Service Fund  
Jelley Family Foundation Fund  
Homer McWilliams Oncology Fund

Marcella Morgan Oncology Fund  
Marjorie Pollard Hospice Fund  
Truman Heartland Community Foundation  
THCF CEO Discretionary Grantmaking Fund  
THCF Community Grantmaking Fund  
THCF Endowment Fund  
THCF Health-related Project Fund  
Youth Advisory Council Endowment Fund





EVOLVING HOW MONEY WORKS TO...

**CREATE A POSITIVE CHANGE IN THE COMMUNITY**

## JAY AND SANDY GRECO

Donor Advised Fund Holders • Blue Springs Business Owners  
Blue Springs Residents

"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 Doult 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 Fitzgerald-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 Gerding 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.

All Creatures Fund  
Anderson Family Foundation Fund  
L. Joseph Arth Donor Advised Fund  
Jerry and Doreen Benton Family Foundation  
Joe and Janice Blackburn Family Charitable Fund  
Carol J. Carpenter Bequest  
James W. and Stephanie D. Chipman Charitable Fund  
Phyllis D. Combest Charitable Remainder Trust  
J.D. and Jeanne Cooper Foundation  
Mahlon Dale and Rose Anne Crown Charitable Gift Annuity  
Missy Curry Foundation  
Marvin and Dixie Droege Charitable Fund  
Raymond C. and Judy Ebert Donor Advised Fund  
Carol Floyd Foundation  
Robert R. Franke Donor Advised Fund  
Helen French Charitable Gift Annuity Funds  
William R. Gann Music Scholarship  
Ed and Sharon Hammond Family Charitable Fund  
Betty L. Harryman Charitable Gift Annuity  
William R. Hartong & E. Elaine Hartong  
Charitable Remainder Trust  
Rosalie M. Headley Charitable Remainder Trust  
William & Wilma Hens Family Foundation Fund  
Jack B. Hoke Charitable Remainder Unitrust  
Robert A. Hoke Charitable Remainder Unitrust  
Ruby N. Hoke Charitable Remainder Unitrust  
Wanda Ruth Hoke Charitable Remainder Unitrust  
Dr. Edward and Connie John Donor Advised Fund  
Jerry and Sharon Kasten Family Foundation Fund  
Koepp Family Fund  
Donald E. Landis Charitable Remainder Unitrust

George & Rita Langton Foundation  
Leland "Tom" and Myrna Mardis Foundation  
Leland Thomas Mardis and Myrna Lee Mardis Gift Annuity  
Donna Masters Charitable Fund  
Richard and Esther McCall Donor Advised Fund  
Richard R. and Esther G. McCall Charitable  
Remainder Trust  
Zita McGraw Charitable Endowment Fund  
Russell and Mabel Pepper Family Foundation Fund  
Potts-Martin Fund  
Jeff and Marita Ray Foundation  
Richard Rhodes Fund for the Lexington Community  
Gary and Glenda Riekhof Family Foundation  
Donald S. Ross Charitable Gift Annuity Fund  
Schneider/Mehrhoff Memorial Fund  
Phil and Maxine Schoggen Charitable Gift Annuity  
Barbara A. Schuster Fund  
Elizabeth Scott Charitable Remainder Trust  
Joseph T. Sefcik Charitable Gift Annuity  
Clifford M. and Mary Beth Seger Charitable Gift Annuity  
Alvin and Ella Marie Sehrt Fund  
Clarence and Betty Stowell Gift Annuity Fund  
Dan and Shannon Sundberg Family Foundation  
Dennis and Jane Taylor Gift Annuity  
Gary R. Toms History & Genealogy Education Fund  
Gary R. Toms History Scholarship Fund  
Gary and Nita Tripp Foundation  
Elizabeth E. "Pat" Wasmuth Charitable Gift Annuity  
Watkins Family Foundation  
Thomas L. Winslow Endowment







EVOLVING HOW MONEY WORKS TO...

**MAKE A DIFFERENCE IN YOUTH'S EDUCATION**

## CHRIS AND STACEY PAYNE

Scholarship Fund Holders • Raytown Education Foundation Supporter  
Raytown Business Owners • Raytown Advisory Board Member

"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 →

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\$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.

# 541

APPLICATIONS  
RECEIVED



FROM

# 312

STUDENTS



# 184

STUDENTS  
RECEIVED

# 218

SCHOLARSHIP  
AWARDS

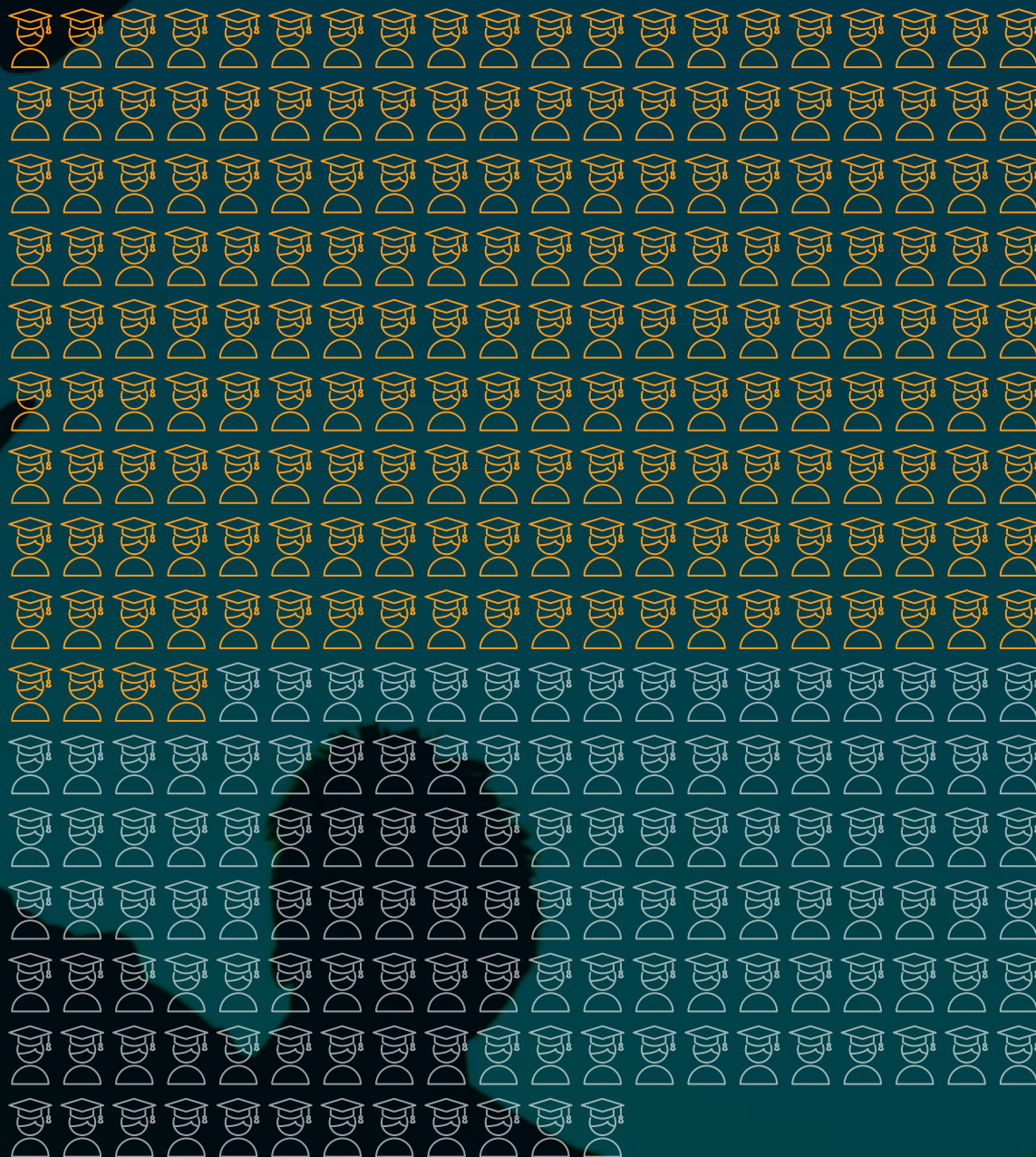
# 80

SCHOLARSHIP  
FUNDS



# 161

REVIEWERS



# MORE THAN \$3.1 MILLION AWARDED IN 33 YEARS.

## SCHOLARSHIP FUNDS →

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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 Palette 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



**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



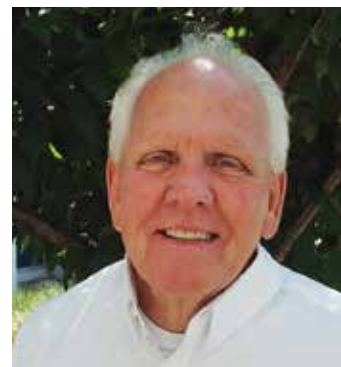
**DAVE SMITH**  
Blue Springs



**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

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Dr. Steven Silverstein.



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- Raytown Education Foundation
- Raytown Quality Schools
- Jan Reding
- Terry and Betty Snapp
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## ANNUAL FOUNDATION FAN CLUB →

Annual funding from donors and corporate sponsors is vital to THCF initiatives such as the Youth Advisory Council and The Community for All Ages Coalition.

### AMBASSADOR FANS \$1,000

Doug and Sarah Horn  
Ron and Sue Hill

Deedee King  
Steve and  
Marianne Noll

Jim and Mary Stilley  
Montie and  
Marjorie Tripp

Beth and  
David Williams

### RAVING FANS \$500

Chuck and  
Colleen Foudree  
Kenneth and  
Eleanor Frasier

Rick and Kathy Hughey  
Terry and Susan Landers  
Melanie Moentmann

Paul and Sandra  
Moentmann  
Mike and Donna Nill  
Steve and Leigh  
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Brenda West

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Darrel Hensley

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Carla Simpson  
Pam Stepp

Dan and Shannon Sundberg  
Rick Viar and  
Kim Berwald Viar  
Dr. Cameron Lindsey and  
Allen West



# 2016 FINANCIAL SUMMARY →

## ASSETS YTD Dec. 31, 2016

### CASH

|                        |                  |
|------------------------|------------------|
| Checking/Sweep Account | 266,845          |
| Petty Cash             | 1,000            |
| <b>Total Cash</b>      | <b>\$267,845</b> |

### INVESTMENTS, AT FAIR MARKET VALUE

|                                      |                     |
|--------------------------------------|---------------------|
| CD-Money Market Portfolio            | 2,796,520           |
| American Funds Portfolio             | 1,509,897           |
| Fixed Income Investment Portfolio    | 7,745,817           |
| Equity Investment Portfolio          | 14,351,506          |
| Charitable Remainder Trust Portfolio | 2,903,947           |
| Investments - Segregated             | 6,451,665           |
| <b>Total Investments</b>             | <b>\$35,759,352</b> |

### OTHER ASSETS

|   |                    |
|---|--------------------|
| Prepaid Expense                             | 9,503              |
| Accounts Receivable                         | 2,392              |
| Charitable Lead Trust - Beneficial Interest | 11,330             |
| Real Estate                                 | 167,709            |
| Insurance Policies                          | 1,978,050          |
| Improvements, Furniture & Equipment         | 54,183             |
| <b>Total Other Assets</b>                   | <b>\$2,223,167</b> |

**TOTAL ASSETS** **\$38,250,364**

## LIABILITIES AND FUND BALANCES

|                          |                 |
|--------------------------|-----------------|
| Accounts Payable         | 38,286          |
| PTO Bank Liability       | 26,280          |
| <b>Total Liabilities</b> | <b>\$64,566</b> |

### FUND BALANCES

|                             |                     |
|-----------------------------|---------------------|
| Unrestricted                | 1,867,858           |
| Donor Advised               | 10,517,254          |
| Charitable Gift Annuity     | 323,140             |
| Designated                  | 11,426,385          |
| Field of Interest           | 4,841,321           |
| Scholarships                | 5,973,521           |
| Charitable Remainder Trusts | 2,902,813           |
| Life Estate Reserved        | 120,008             |
| Administration              | 213,498             |
| <b>Total Fund Balance</b>   | <b>\$38,185,798</b> |

**TOTAL LIABILITIES AND FUND BALANCE** **\$38,250,364**

## REVENUE AND SUPPORT

### CONTRIBUTIONS

|                            |                    |
|----------------------------|--------------------|
| Donor Advised Funds        | 3,264,438          |
| Gift Annuity               | 50,000             |
| Designated Funds           | 550,511            |
| Field of Interest Funds    | 772,166            |
| Scholarship Funds          | 734,596            |
| Administration             | 330,161            |
| <b>Total Contributions</b> | <b>\$5,701,872</b> |

## OTHER REVENUE (INVESTMENT RETURNS) YTD Dec. 31, 2016

### Money Market Portfolio

|                                     |                 |
|-------------------------------------|-----------------|
| Money Market Pool Interest Income   | 43,895          |
| <b>Total Money Market Portfolio</b> | <b>\$43,895</b> |

### Fixed Income Securities Portfolio

|  |                  |
|--|------------------|
| Interest Income                                | 241,876          |
| Capital Gain/(Losses) - Realized               | (298,844)        |
| Capital Gain/(Losses) - Unrealized             | 224,408          |
| <b>Total Fixed Income Securities Portfolio</b> | <b>\$167,440</b> |

### Equity Securities Portfolio

|  |                    |
|--|--------------------|
| Dividend Income                          | 462,129            |
| Capital Gain/(Losses) - Realized         | 357,856            |
| Capital Gain/(Losses) - Unrealized       | 410,556            |
| <b>Total Equity Securities Portfolio</b> | <b>\$1,230,541</b> |

### American Funds Portfolio

|                                       |                  |
|---------------------------------------|------------------|
| Dividend Income                       | 62,613           |
| Capital Gain/(Losses) - Realized      | 33,877           |
| Capital Gain/(Losses) - Unrealized    | 23,982           |
| <b>Total American Funds Portfolio</b> | <b>\$120,472</b> |

### Charitable Remainder Trust Portfolio

|                                    |                  |
|------------------------------------|------------------|
| Interest and Dividend Income       | 87,645           |
| Capital Gain/(Losses) - Realized   | (22,890)         |
| Capital Gain/(Losses) - Unrealized | 192,474          |
| <b>Total CRT Portfolio</b>         | <b>\$257,229</b> |

### Segregated Funds Portfolios

|                                    |                  |
|------------------------------------|------------------|
| Interest and Dividend Income       | 169,882          |
| Capital Gain/(Losses) - Realized   | (83,079)         |
| Capital Gain/(Losses) - Unrealized | 326,620          |
| <b>Total Segregated Portfolio</b>  | <b>\$413,423</b> |

### Other Investment Earnings

|                                   |                 |
|-----------------------------------|-----------------|
| Capital Gain/(Loss) - Stock Gifts | (6,249)         |
| Change in Life Insurance Values   | 97,945          |
| <b>Total Other Investment</b>     | <b>\$91,696</b> |

**TOTAL OTHER REVENUE** **\$2,324,696**  
**TOTAL REVENUE AND SUPPORT** **\$8,026,568**

## GRANTS AND EXPENSES

### GRANTS

|                         |                    |
|-------------------------|--------------------|
| Unrestricted Funds      | 100,848            |
| Donor Advised Funds     | 1,195,489          |
| Designated Funds        | 1,251,857          |
| Field of Interest Funds | 578,392            |
| Scholarships Funds      | 223,753            |
| <b>Total Grants</b>     | <b>\$3,350,339</b> |

### ADMINISTRATION EXPENSES

|                                      |                    |
|--------------------------------------|--------------------|
| Directly Assignable Fund Expenses    | 296,086            |
| Administrative Expenses              | 887,409            |
| <b>Total Administration Expenses</b> | <b>\$1,183,495</b> |

**TOTAL GRANTS AND EXPENSES** **\$4,533,834**  
**REVENUE LESS GRANTS AND EXPENSES** **\$3,492,734**  
**FUND BALANCE, beginning of period** **\$34,693,064**  
**FUND BALANCE, end of period** **\$38,185,798**



## TRUMAN HEARTLAND COMMUNITY FOUNDATION

4200 Little Blue Parkway, Suite 340

Independence, MO 64057

### 2016 AT A GLANCE →

