

COMMUNITY FOUNDATION OF COLLIER COUNTY

CONNECTOR

PRIDE OF THE NAPLES ZOO

Connecting private foundations with local nonprofit needs, resulting in the upgrade of a popular lion exhibit.

THANK YOU
to the community!

We could not have
done it without you!



COMMUNITY FOUNDATION
OF COLLIER COUNTY
FOR GOOD. FOREVER.

ONE VISIONARY: FIVE FUNDS

Local man leaves an awe-inspiring legacy
for Collier County—and for his family.

MORE THAN MEALS

Launching an innovative service that's
overlooked here and nationwide



what is a

COMMUNITY FOUNDATION?

From environment and education to health and economic development, our knowledge and expertise ensures our donors are able to maximize the impact of their giving. And our proven track record of sound investments ensures those generous gifts are able to continue creating meaningful change into the future.

- ▶ We are a collection of charitable funds established by individuals, families, businesses and organizations to help address critical needs and improve the quality of life in Collier County.
- ▶ We receive charitable gifts, work with families, individuals, attorneys and estate and financial planners to devise plans that fit every economic situation, ensuring that donors' charitable contributions are used to the fullest extent and for maximum benefit.
- ▶ We place those gifts into funds, manage the assets of those funds for growth and make grants from those funds.
- ▶ We offer several types of funds to help donors achieve their charitable goals while also meeting community needs.
- ▶ In addition to making grants to nonprofits and special projects in our community, we identify needs, stimulate resources to address those needs and help Collier County prepare for the future.
- ▶ Our volunteer board and experienced staff are committed to understanding donor needs, representing their charitable interests, expertly handling complex gifts, wisely managing charitable funds and leveraging a wealth of community knowledge to increase charitable impact.
- ▶ We serve as a hub for collaboration between philanthropists, nonprofits and other funding organizations across the community.

Audubon Corkscrew Swamp Sanctuary has received nearly 200,000 in grants from the Community Foundation in the past 4 years. The Community Foundation is a leader in community collaboration through grant distributions to nonprofit organizations and community programs.

TABLE OF CONTENTS



Inside
Front
Cover

WHAT IS A COMMUNITY FOUNDATION?

- 2..... PRESIDENT AND BOARD CHAIR'S LETTER**
- 4..... FACILITATING CHARITABLE GIVING**
- 5..... BOARD OF TRUSTEES**
- 6..... Family Legacy**
ONE VISIONARY: FIVE FUNDS Local man leaves an awe-inspiring legacy for Collier County—and for his family.
- 8..... Changing Needs**
MEETING THE NEXT CHALLENGE The Changing Needs Fund is a safety net to help address whatever comes our way.
- 10..... The Immokalee Foundation**
SAVINGS PLAN A local foundation is realizing a significant cost savings on its permanent endowment.
- 12..... Scholarship Selector**
SELECTING TO SUCCEED Linking donors with the neediest students ensuring successful futures.
- 14..... Alternative Ways to Support**
WHY WAIT? The recent donation of a commercial building is a first for the Community Foundation.
- 16..... Convening, Collaborating and Connecting**
PRIDE OF THE NAPLES ZOO A popular lion exhibit gets an upgrade.

- 18..... Taste of Immokalee**
PROFITING FOR GOOD Converting Taste of Immokalee into a charitable investment B-Corp. that reaps social rewards.
- 20..... Women's Foundation**
MORE THAN MEALS Launching an innovative service that's overlooked here and nationwide.
- 22..... ASSETS:** Foundation Financials
- 24..... FOUNDATION COMMITTEES**
- 26..... CONNECTING PEOPLE WITH CAUSES THAT MATTER**
- 28..... THANKS TO OUR SPONSORS**
- 31..... LEAVING A LEGACY:** The Legacy Society
- 32..... COMMUNITY FOUNDATION STAFF**

The Community Foundation of Collier County Connector, 2016-2017 Annual Report Team

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Connecting people who care with causes that matter

Dear Friends,

Looking back on the past year, we are full of pride that the Community Foundation family continues to grow and make a difference in our community. Our family of donors, sponsors, Board, nonprofits, professional advisors, staff and volunteers work together to enable important nonprofit programs that benefit the community as a whole and build philanthropic legacies that will be passed down through the generations.

At the Community Foundation of Collier County, our focus remains unchanged—to connect people who care with causes that matter. And with every passing year, we see the benefits of this philanthropic collaboration in Collier County. In this report you will learn how a father's legacy inspired his family to carry on his values of giving, how a private foundation was connected with a nonprofit to build an up-close and personal nature exhibit that the whole community can take pride in and how we joined with an innovative program that empowers young students to become entrepreneurs. These and other great stories of what we've accomplished inspire us to dream of what we can do in the future—together.

Since 1985, the Community Foundation has been convening, collaborating and connecting to increase and focus private philanthropy in the area. We manage more than 510 funds, collaborate with more than 400 nonprofits, hold over \$150 million in assets and have distributed nearly \$112 million in grants to nonprofit organizations and community programs.

Join our family by making a donation, opening a fund, starting a scholarship, considering a planned gift, or by contributing to our Changing Needs Fund to help ensure our community has the resources to meet the unimagined needs of tomorrow's Collier County. You will get the confidence of knowing that your intentions will be carried out forever in your name and the satisfaction of supporting the causes you care about—while helping to make things better for everyone.

We are thankful and honored that you have given us your trust and look forward to our work in the future, as a community. Together, we can help make Collier County a place that is a model of compassion, empowerment and giving—a place where we all feel connected. For good and forever.



Eileen Connolly-Keesler,
President/CEO



Jennifer B. Walker,
Chair, Board of Trustees



Jennifer Walker, left, and Eileen Connolly-Keesler

YOU MAKE A DIFFERENCE... WE MAKE IT EASIER

Benefits of choosing the Community Foundation to facilitate your charitable giving

SERVICE AND KNOWLEDGE | We offer services and benefits to our donors. We also offer insight into community needs and the agencies that can most effectively address them. We oversee grantmaking to ensure that each grant achieves its intended effect.

SIMPLICITY | We offer an easy and effective way to support the groups and issues you care about through a gift to a single organization.

TAX AND FINANCIAL BENEFITS | Gifts to the Community Foundation receive the maximum tax advantages for income, gift and estate tax purposes. We maximize charitable assets by offering lower expenses and fewer administrative burdens than private foundations.

CHOICE | We can receive many kinds of gifts, including unique assets such as real estate and collectibles. Our staff can help you and your financial advisor develop a gift plan to meet both your personal financial needs and all of your charitable intentions, now and in the future.

LEADERSHIP | We adhere to the highest standards of professional excellence. We are an accredited Community Foundation with the National Standards for U.S. Community Foundations, which represent operational effectiveness to foster excellence in community philanthropy. We are also a Guidestar Platinum participant, representing the highest level of nonprofit effectiveness and transparency.

OBJECTIVITY | The Community Foundation distributes charitable dollars by connecting people who care with causes that matter. Unrestricted funds are used to support the community's most important needs and opportunities, while other funds established by donors are designated to benefit our donors' favorite causes.

STEWARDSHIP | When donors establish permanent endowments with us, we make sure that, if a nonprofit organization's mission or leadership changes significantly, funds are reallocated according to the donor's original intent.

PERMANENCE | The Community Foundation was established in 1985 with an endowment of \$300,000 and has experienced substantial growth. With an endowment, assets are invested to generate an ongoing source of income year after year, and your legacy can last forever.



2016-2017
Board of Trustees



OUR MISSION To improve the quality of life in Collier County by connecting donors to community needs and providing leadership on critical community issues. *For good. Forever.*

THE COMMUNITY FOUNDATION OF COLLIER COUNTY is governed by a Board of Trustees and committees comprised of local community leaders and philanthropy enthusiasts. The Community Foundation is administered by a full-time professional staff. Operating expenses are paid from management fees, through grants and partnerships with local and national foundations and organizations, and from gifts designated by donors to cover Foundation operating costs.

For a complete listing of funds and grants, please visit cfcollier.org.

Front Row: Mario M. Valle, Mary Beth Johns, Mary Lynn Myers, Jennifer B. Walker (Chair), Kathleen L. Kircher, Laird Grant Groody, Brian V. McAvoy

Back Row: Jerry Tostrud, David Watson, Patricia Aiken-O'Neill, Kathleen Kapnick, Eileen Connolly-Keesler, Patricia A. Jilk, Suzanne Lount, George Abounader, John K. Paul, T. Robert Bulloch

Not Pictured: Dennis C. Brown, Blake Gable, Kim Ciccarelli Kantor, James F. Morey, Marsha Murphy, Deborah L. Russell

one visionary:
**FIVE
FUNDS**

Naples resident Henry E. Haegg, Jr., left an awe-inspiring legacy for Collier County—and for his family.

WHEN HENRY E. HAEGG, JR., 93, passed away in February, he left his stepchildren a significant donor advised fund in each of their names at the Community Foundation of Collier County, in addition to a \$1-million-plus unrestricted donation to meet emerging needs.

Although his heirs had no idea he was planning this thoughtful, impactful legacy, they weren't surprised, either. "Henry's philosophy was: Put back more than you take out. That really was the bot-

tom line for Henry," says stepson Jamey Halpin of Naples.

Henry accepted five stepchildren as his own after marrying their widowed mother, Margaret (Peg) Halpin, in 1969, in Cedar Rapids, Iowa. With two engineering degrees and an MBA from Harvard Business School, the World War II veteran worked in his family's business before establishing Haegg Construction Company.

The Haeggs moved to Naples in 1970, were

l-r: Larry Halpin, Cathy Munsell, Kathleen Halpin (holding picture of stepdad Henry E. Haegg), Molly Eovino, and Jamey Halpin





“
*Henry’s philosophy was:
Put back more than you
take out.*
”

among the first Pelican Bay residents, and helped build St. John’s Episcopal Church. Sadly, Peg died in 2008.

Stepson David Halpin passed away so his donor advised fund is being administered by his widow, Kathleen Halpin. “We all thought it was outstanding that Henry set this up to continue his philanthropy and ours,” says Kathleen. David died from Alzheimer’s, so she plans to focus on dementia but notes that her children “may have their own spe-

cific charities they are interested in. I will use them as sounding boards for where our giving will be.”

Community Foundation President/CEO Eileen Connolly-Keesler is awestruck by Henry’s big heart. “I’ve never seen a path to passing on philanthropy the way this one has taken.” Henry left an indelible legacy for the Greater Cedar Rapids Community Foundation in his will, too. Giving back to both communities “shouldn’t be either-or. It should be both,” she says.

CHANGING
NEEDS

Laird A. Lile,
Naples trust and estate
attorney and Community
Foundation Professional
Advisor Committee

meeting the next
CHALLENGE

There is no crystal ball to predict critical issues that will emerge in Collier County, but the Changing Needs Fund is a safety net to help address whatever comes our way.

“**THE ONLY THING THAT IS CONSTANT** is change,” is a wise saying.

In 1986, the Community Foundation of Collier County made one of its first grant distributions to the brand-new Shelter for Abused Women & Children because domestic violence had become a visible—yet sorely underserved—problem. During the next three decades, the Community Foundation has remained at the forefront of identifying emerging needs and issues—and directly funding local programs and charities designed to meet those community challenges through its Changing Needs Fund.

Changing needs arrive on all fronts: from health epidemics to early childhood education, from local environmental challenges to ensuring the wellbeing of low-income seniors. “We are working to really grow our Changing Needs Fund so we can react to issues that are affecting this community—so we can deal with whatever comes down the pike,” says Community Foundation President/CEO Eileen Connolly-Keesler.

Naples trust and estate attorney Laird A. Lile says that many of his clients recognize that societal issues are dynamic. “When they were youngsters, research to curb polio was needed, but now research for other illnesses is necessary,” says Lile, who serves on the Foundation’s Professional Advisor Committee. “The concept of an organization that has the stability and dexterity of the Community Foundation is appealing because those clients want to help with the community’s needs in perpetuity—knowing they can’t predict with any certainty what those needs will be in the future.”

Lile worked with Naples resident Henry E. Haegg, Jr., on establishing an unrestricted gift in excess of \$1 million to the Community Foundation as part of Henry’s estate. “He was a very pragmatic person,” says Lile. “This is where the Community Foundation comes in: It knows where the needs are and how those needs change over time, and that’s a big appeal to my clients.” (See more about Henry’s legacy of giving on page 6.)

Meet tomorrow’s needs today with the Community Foundation

Although it is impossible to predict Collier County’s future challenges, you can help ensure our community has the resources to meet the unimagined needs of generations to come. The Community Foundation has many ways to donate to our Changing Needs Fund to make a lasting impact on our community — for good and forever. Call the Community Foundation to help meet the contemporary needs of tomorrow’s Collier County.

WAYS TO GIVE

The Community Foundation works with donors and their professional advisors to facilitate contributions in many forms:

- ▶ Cash and marketable securities
- ▶ Closely-held and restricted stock
- ▶ Business and partnership interests
- ▶ Tangible personal property
- ▶ Real estate
- ▶ Retirement plan assets
- ▶ Gifts of life insurance
- ▶ Gift annuities



savings PLAN

A local foundation is realizing a significant cost savings on its endowment since transferring its administration to the Community Foundation.

The Immokalee Foundation has enjoyed a long partnership with the Community Foundation, which provided an \$11,000 grant this year to expand the Immokalee Readers Program, which boosted reading gains for 581 Immokalee academically at-risk elementary students. Read more about the Immokalee Readers Program at cfcollier.org/news.

LAST YEAR, THE IMMOKALEE FOUNDATION celebrated its 25th anniversary as a nonprofit improving lives in the underserved migrant community east of Naples, where 45 percent of the population lives below the poverty line.

The Immokalee Foundation made a smart investment in future savings with their nearly \$6 million endowment now in place under the administration of the Community Foundation of Collier County. The Immokalee Foundation Executive Director Steven Kissinger pointed out that while this is a great start for what they need to continue their programs and operations, the Foundation envisions a \$25 million endowment for long-term sustainability of their continued impact in the community. Steve also noted that the transfer of management from a global financial services company to the Community Foundation realizes an annual savings of \$15,000 because of reduced fee structures. “That is, in and of itself, a nice return on investment for the first year, and we’re not doing anything differently. That will be a year-over-year savings.”

The Immokalee Foundation doesn’t dip into the principal, but continuously draws interest to fund programs designed to lift program participants out of poverty through “individual *Pathways to Success* plans that nurture each child’s development as a student, a citizen and a future professional.” The funds from the endowment are primarily used to pay for Florida Prepaid College Plans for the Take Stock in Children Scholarship Program, Steve says.

“It is a source of continuous funds that go directly for scholarship purposes,” says Steve, noting there were 169 Take Stock recipients last academic year. The 529 college savings plans are purchased years in advance of usage, and the cost per student depends on whether they are receiving a two-year or four-year scholarship, year of college attendance, and institution where the recipient is enrolled. “The Community Foundation is a great partner to a lot of organizations,” says Kissinger. “At this new partnering level, they offer other opportunities.”

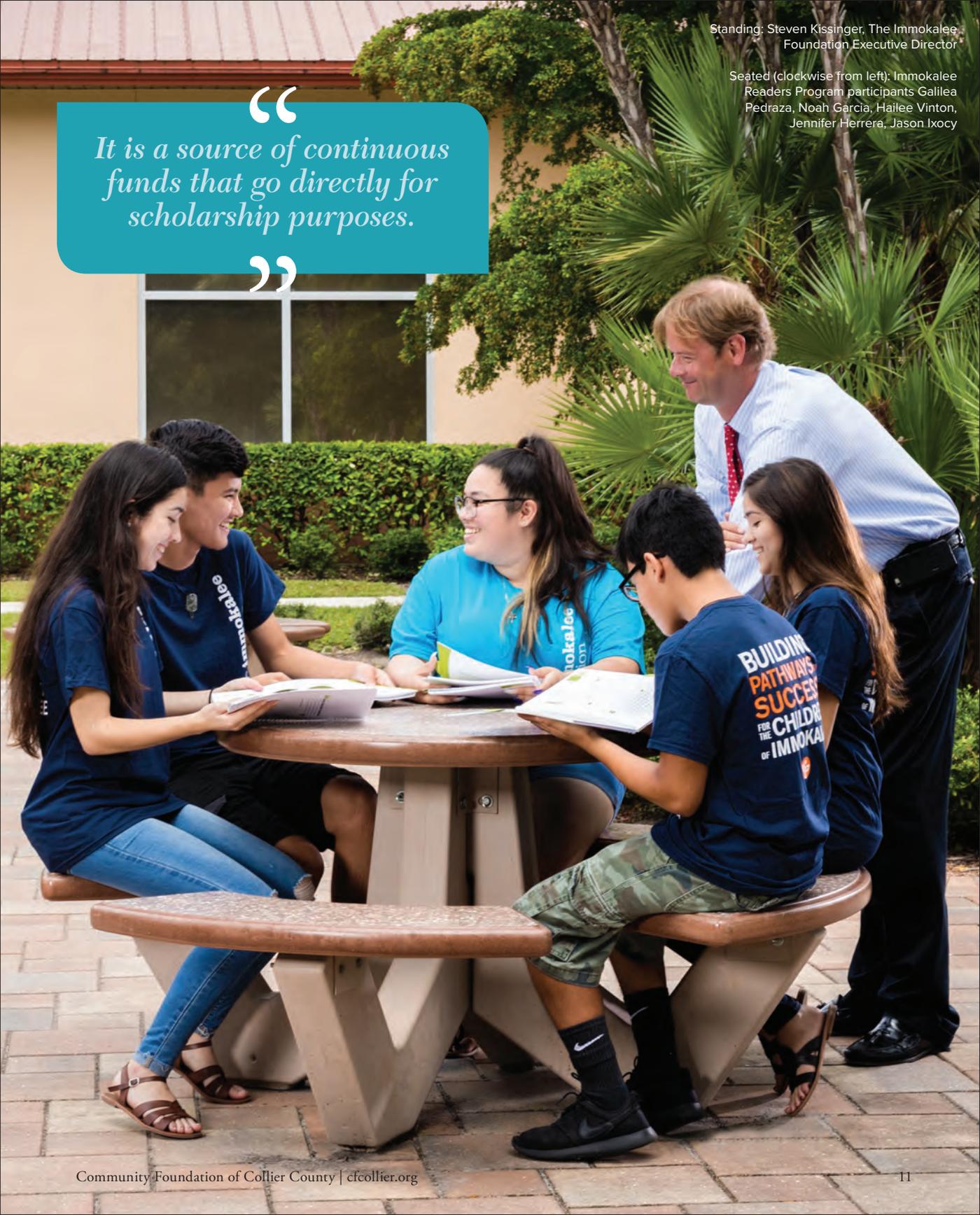
Standing: Steven Kissinger, The Immokalee Foundation Executive Director

Seated (clockwise from left): Immokalee Readers Program participants Galilea Pedraza, Noah Garcia, Hailee Vinton, Jennifer Herrera, Jason Ixocy

“

It is a source of continuous funds that go directly for scholarship purposes.

”



SCHOLARSHIP
SELECTOR



selecting to SUCCEED

The Community Foundation's Scholarship Selector, the newest phase of the popular Scholarship Connector, links donors with the neediest students to ensure they complete their degrees for successful futures.

Scholarship Connector users and scholarship recipients: (l-r) Nolan Lynch, Janet DelValle, Juan Pena, Casey Haenn, Watson Marcelia, Dianicar Estiverne, Romano Coe, Annie Sanabria, Alexzandra Mattia, Stephany Valdes, Yesenia Galindo





The Scholarship Connector helped me filter through a lot of scholarships offered in this area. It puts the scholarship opportunities right in front of me so it's easier to look through them all—and I ended up getting one, so that's great!

Romano Coe,
University of Florida
Accounting Major



LOW-INCOME STUDENTS IN COLLIER COUNTY

who go to college on the statewide Take Stock in Children Scholarship are giving it their all to break out of poverty—and have proven their dedication to success.

Take Stock recipients are mentored throughout high school by a College Success Coach who guides them through the complex maze of academics, decision-making, voluntarism and professional development. The students remain drug and crime-free and they maintain good grades.

In Collier County, two nonprofits administer these scholarships: Champions For Learning and The Immokalee Foundation. Both offer two-year Take Stock scholarships. The Immokalee Foundation provides four-year scholarships as well.

After working so hard—often becoming the first in their family to graduate high school or move on to higher education—these students need extra financial support to complete their degree. The new function of the Scholarship Connector, named the Scholarship Selector, is linking them directly with donors to create additional scholarship opportunities so they don't drop out prematurely due to fears of school debt.

“When they reach the third, fourth or fifth years, it's a huge wall to overcome. They may just stick with their associate degree,” says Community Foundation Education/Scholarship Director Sharon Bayata. “Take Stock scholars are the neediest. But they've shown that they are dedicated to education and bettering themselves by being successful in a career path.”

Through the Scholarship Selector, donors review students' profiles and choose the ones they wish to support, based on the student's field of interest and other criteria the donor values. The Community Foundation's committee selects a recipient out of a pool of five chosen by the donor to ensure the donation is tax-deductible.

“It'll be a fabulous resource for our Take Stock students. It's great this will help them get a continuation beyond the first two years,” says The Im-

mokalee Foundation Executive Director Steven Kissinger.

More than 75 student profiles, which will be regularly updated, are in the Scholarship Selector. “We're making sure it's really easy for the users and for the donors,” says Bayata.

Champions For Learning President Susan McManus praises the students who have made it through the rigorous Take Stock program, adding she's grateful that they are “eligible to apply for scholarship support as they continue” bettering their futures. Champions For Learning is a partner, along with the Community Foundation, of Future Ready Collier, whose mission of helping students achieve their vision for the future is positively impacted by the Scholarship Selector.

The Scholarship Selector is also a visionary tool shaping the next generation of academic philanthropists. “We're creating an opportunity in a platform on par with what these students are used to and what philanthropy will look like in the future,” Bayata says.

colliercountyscholarships.org

Scholarship Selector Process for Students & Donors

- 1 | Students complete an online Profile.
- 2 | Donors interested in supporting students from Collier County create an account and review the students requesting scholarship support.
- 3 | Donors Select 5 students to potentially support & provide donation of support.
- 4 | CFCC Scholarship Committee selects 1 student to receive the Donor's award.

Jerry F. Nichols,
Community Foundation
Professional Advisor
Committee

why WAIT?

The recent donation of a commercial building is a first for the Community Foundation—one that provides ongoing benefit to local charities and favorable tax advantages for the donor.

JERRY F. NICHOLS IS A LOCAL WEALTH MANAGEMENT ADVISOR and 30-year supporter of the Community Foundation of Collier County. Recently, he donated a commercial building after carefully researching the financial benefits for him and the Foundation. Both came out winners.

Nichols had been considering donating the central Naples building he's owned for 10 years, and decided to do it this year after realizing the tax advantages and charitable rewards. "Many people do their giving at the time of passing," he says. "I decided to do it now and be a partner with the organization and accomplish current needs in the community."

A CPA and chartered financial consultant with Northwestern Mutual, Nichols oversees his donor advised Nichols Foundation Fund that focuses on improving children's lives through education, access to health care and a safe environment. Now, the full net income of the donated building goes directly to his donor advised fund.

If a \$1 million building generates \$100,000 in net income, 40 percent of that goes to the IRS. "By donating the building, the entire \$100,000 goes to charitable organizations without income tax," he says. "That's significant."

The building is classified as an LLC—a subsidiary holding of the Community Foundation with its own board of directors. Maintenance and rent are handled by a property management company. Often, gifts of real estate and stocks are sold upon receipt by a charity, but this structure ensures an ongoing source of revenue for giving and has tax benefits for Nichols, who receives a charitable deduction for the fair market value. If he donated it to a private foundation, only the original cost basis could be deducted, so working with the Community Foundation resulted in a better deduction for Nichols.

"I encourage other advisors and donors to think about gifting currently, during their lifetime," says Nichols, who serves on the Community Foundation's Professional Advisor Committee. "Whatever your passion, you can get more accomplished and do a lot more good instead of waiting."

“
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to think about gifting currently,
during their lifetime.*
”

PRIDE *of the Naples Zoo*

The Community Foundation connects private foundations with local nonprofit needs, resulting this year in the upgrade of a popular lion exhibit.

WHEN A PRIVATE FOUNDATION was looking for impactful projects to fund, a representative called the Community Foundation of Collier County. Foundation President/CEO Eileen Connolly-Keesler convened her team to invite compat-



ible organizations to submit proposals. “It’s not unusual for private foundations to ask us to help them do their grantmaking,” she says. “It shows the breadth of the Community Foundation.”

The Naples Zoo at Caribbean Gardens earned two grants—\$24,000 to upgrade the enclosure for its breeding pair of South African lions and \$23,200 to partially fund a new education programs manager position to meet rapidly expanding outreach demands.

The popular lions’ chain-link fence has been replaced with framed, glass panels for better viewing and photography. A shaded thatch hut keeps visitors cool and dry. The upgrade also included enhanced landscaping in the lion yard and replacing Masamba’s and Shani’s resting platform.

“The Foundation staff is fabulous to work with.

It was an easy process on our end and it’s been extraordinarily positive,” says Naples Zoo President and CEO Jack Mulvena. The Zoo’s attendance is approximately 390,000 annually “so there will be many happy visitors.”

Expanding education staff was also critical for Naples Zoo, which reached 22,000 school children and local residents this year—a remarkable increase in four years. When Mulvena arrived in 2013, no formal educational, outreach program existed.

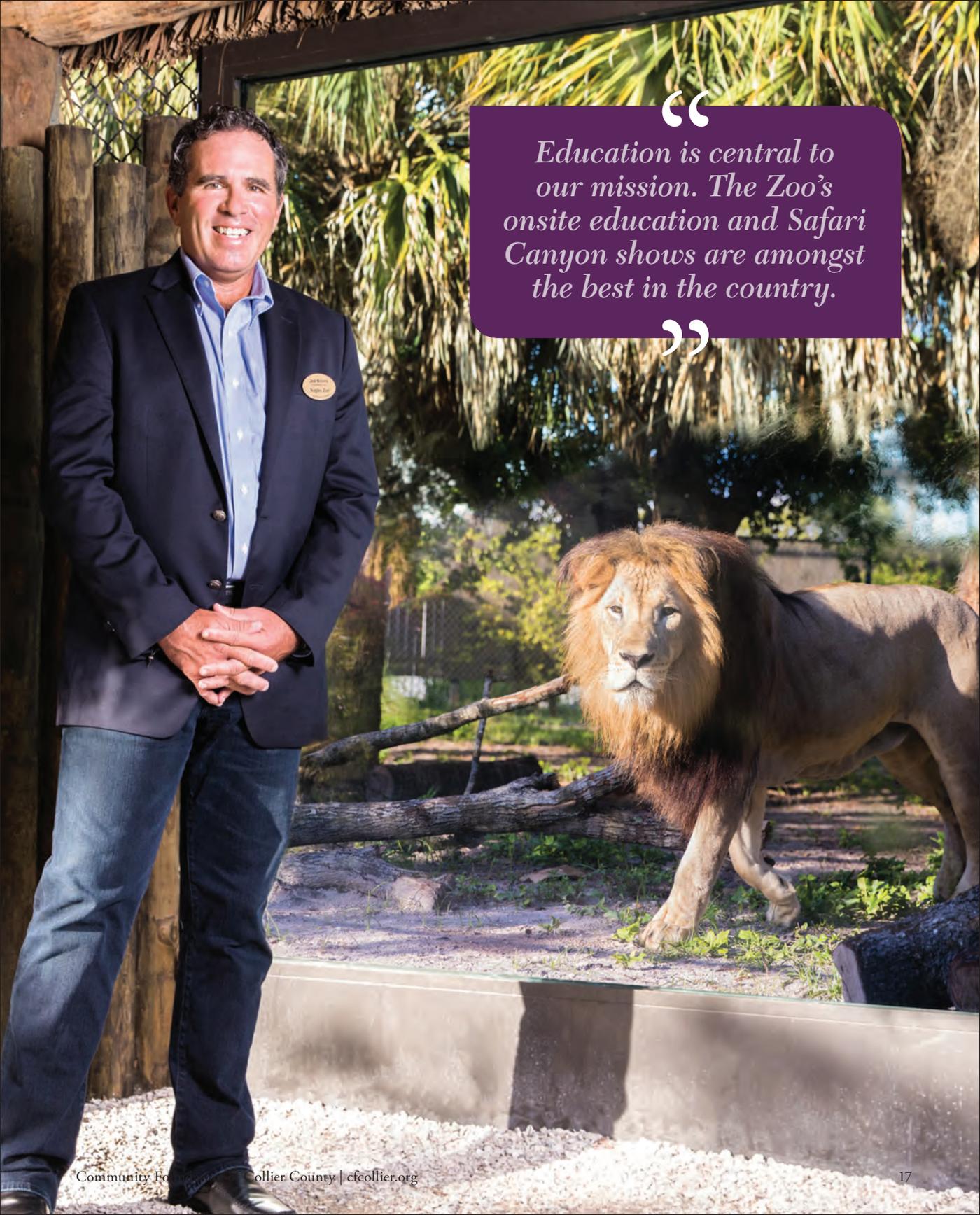
“Education is central to our mission. The Zoo’s onsite education and Safari Canyon shows are amongst the best in the country but we weren’t doing formal education like all good accredited zoos,” he says. “We couldn’t be more appreciative.”

For the Foundation, connecting local nonprofits with financial resources they need is all in a day’s work. “We have a close relationship with nonprofits. We ask what the needs of the community are and how we can connect nonprofits with donors. That’s what we do—connect the needs,” says Connolly-Keesler.

\$24,000
Granted to upgrade the enclosure for its breeding pair of South African lions

\$23,200
Granted to partially fund a new education programs manager position to meet rapidly expanding outreach demands

390,000
The Zoo’s approximate annual attendance



“
Education is central to our mission. The Zoo’s onsite education and Safari Canyon shows are amongst the best in the country.
”

TASTE OF
IMMOKALEE



profiting for GOOD

The Community Foundation and Tamiami Angel Funds teamed up to convert the nonprofit Taste of Immokalee into a charitable investment B-Corp. that reaps social rewards.



Standing: Tim Carwright, Tamiami Angels Funds Chairman; John Slusar, Taste of Immokalee CEO
Seated: Taste of Immokalee Student Entrepreneurs Kayla Boney, Elias Cuevas, Wenchy Dutreuil, Myra Jaimes

Since 2014, Taste of Immokalee has:

- ▶ **Awarded \$25,000 in scholarships in partnership with 1by1 Leadership Foundation**
- ▶ **Sold over \$63,000 in products**
- ▶ **Products sold in more than 7 local stores plus Collier County Publix stores and Collier County public schools**
- ▶ **Involved more than 50 students in the program**
- ▶ **Provided 38 students with summer internships**

WHAT DO LOCAL FLAVORS have in common with charitable investment? Taste of Immokalee.

The Community Foundation of Collier County has partnered with the Tamiami Angel Funds to make this burgeoning student entrepreneurial program a “social impact” charitable-giving vehicle with potentially far-reaching results.

Immokalee High School students launched the nonprofit in 2014 to learn entrepreneurship. They developed family recipes spotlighting Immokalee’s crops and cultures, while learning about food science, marketing, basic accounting, quality control and outreach. Today, six commercial products—such as chipotle barbeque sauce—are sold at shops and food festivals with profits being reinvested into Immokalee’s residents and economy.

The students pitched their business model to the Tamiami Angel Funds, a local venture capital group that invests in startups. Fund Chairman Tim Cartwright was impressed by what the students were learning and their “creativity and ingenuity. To the credit of these students, they said, ‘Let’s look at the resources and assets we have in Immokalee and build a business,’” he says.

Taste of Immokalee is a benefit corporation (B-Corp.) officially named the TA Charitable

Investor Program. Investors who donate to the Community Foundation, who then purchase shares, get a charitable tax deduction. The Foundation holds the stock, hoping that it grows nationally and reaps big rewards if it goes public, à la Ben & Jerry’s and Newman’s Own. That windfall could be directly reinvested into jobs, manufacturing and scholarships. “This is a unique opportunity to hold shares in this innovative project,” says Community Foundation President/CEO Eileen Connolly-Keesler. “If the shares take off, we will be able to build a fund around economic development.”

Tamiami Angel Funds investors have contributed over \$15,000, with a goal to raise \$250,000 so the program can expand. Donors could “make a straight charitable donation, but this is more than that. There’s an exchange of stock going on,” says Cartwright, who worked on the B-Corp. conversion pro bono. “If the company defies startup odds and succeeds, then the donors, students and Community Foundation win.”



more than
MEALS



WOMEN'S FOUNDATION
OF COLLIER COUNTY
EMPOWERING. INVESTING. INSPIRING.

**A Women's Foundation of
Collier County grant
launches an innovative service
that's overlooked here and
nationwide.**



l-r: Shianna Francis and mom, Crystal Francis, clients and volunteers at Meals of Hope, Stephen Popper, Meals of Hope President/CEO

DID YOU KNOW...?

Only 69% of women in Collier County have health insurance coverage as compared to 78% in the state

12.7% of women in Collier County aged 18 and older are living in poverty as compared to 10.8% of men

There are twice as many female-headed households in Collier County with children under the age of 18 (6,697) than male-headed households with children (3,287)

Senior women in Collier County receive \$461 less per month in social security benefits than men, the largest gap of all Florida counties

Women in Collier County earn 77 cents on the dollar as compared to men in the same position

MEALS OF HOPE FOUNDER and Executive Director Steve Popper recalls there were audible gasps at the 2016 Power of the Purse Luncheon when the audience learned that the federal food stamp program doesn't cover feminine hygiene products—and that low-income teens miss school during 'that time of the month' as a result.

Menstrual tampons and pads are costly items that are not top of mind when residents are gathering non-perishable donations for local food banks or pantries. Due to the items' high cost and infrequent donation, food banks rarely have them on hand to distribute, Popper says.

That is why Meals of Hope presented the issue to the Women's Foundation of Collier County, who stepped forward with a \$15,000 grant last year. "The federal government is saying this is a luxury—and that blew my mind," Popper says. After receiving the grant, Popper's team "went straight to the manufacturers" to purchase hygiene products in bulk, significantly below retail cost. "When we see a problem," Popper says, "we're going to effectively address the problem."

Meals of Hope, the largest pantry in Collier County, distributes food to 700 families in three underserved community locations: Lely Presbyterian Church, Greater Naples YMCA and Golden Gate Senior Center. Feminine hygiene products are "the No. 1 item requested when people come," he says. "It is the first item that the pantry runs out of every week. We have made the commitment, come hell or high water, to continue to stock those products."

Popper estimates there are 1,177 needy, young women in Collier County Public Schools in need of hygiene products. "Through the generosity of the Women's Foundation, we were able to make life easier for thousands of women throughout the year," Popper says. "Meals of Hope is able to affect the lives of many people in our community, but we're just the conduit of this community's generosity."

The Women's Foundation of Collier County, a fund at the Community Foundation, makes a major impact in the lives of local at-risk women and girls by serving their current and changing needs through grantmaking.

THE IMPORTANCE OF TRANSPARENCY

The Community Foundation of Collier County adheres to the highest standards to operate in the public view and public interest. Our most current financial information is updated quarterly and always available for review. On our website, we make available for public inspection the last three years of our financial statements, Internal Revenue Service Form 990 and Form 990-T (if applicable), and our Letter of Determination. You may also visit GuideStar at guidestar.org for more information about the Community Foundation.



Excellence. Accountability. Impact.™



ASSETS

	2017	2016
Cash and Cash Equivalents	\$21,529,581	\$5,734,408
Investments	\$128,835,641	\$111,246,393
Split/Beneficial Interest Receivable	\$2,200,113	\$1,786,814
CGA Investment Account	\$605,839	\$602,652
Pledges Receivable	\$228,661	\$805,885
Other Receivables, Prepaids and Debentures	\$140,702	\$66,682
Property and Equipment, Net	\$2,187,675	\$2,260,997
LLC Property and Equipment, Net	\$1,724,142	\$-
Total Assets	\$157,452,354	\$122,503,831

LIABILITIES AND NET ASSETS

LIABILITIES

Loan Payable	\$90,543	\$406,950
Payables & Accrued Expenses	\$230,001	\$287,171
Funds Held for Agencies	\$51,490,032	\$40,320,435
Annuity Obligations	\$446,657	\$547,866
Total Liabilities	\$52,257,233	\$41,562,423

NET ASSETS

Unrestricted

Board Designated Endowment Funds:

• Designated for Specific Nonprofits	\$18,640,282	\$16,788,956
• Designated Grantmaking	\$11,995,008	\$11,218,026
• Administrative and Program Endowment	\$1,483,021	\$1,379,146
• Scholarship	\$5,039,418	\$4,068,953
• Field of Interest	\$5,220,291	\$4,558,734

Total Board Designated per Donor Request **\$42,378,020** **\$38,013,816**

Donor Advised	\$50,318,507	\$37,750,698
Supporting Orgs and LLCs	\$5,077,556	\$-
Operating and Unrestricted Reserve	\$794,595	\$411,461
Designated for Property and Equipment	\$3,937,790	\$2,260,997
Reserve for CGA Obligations	\$159,182	\$54,787

Total Unrestricted Net Assets **\$102,665,650** **\$78,491,758**

Temporarily Restricted

Campaigns and Projects	\$329,358	\$662,836
Split Interest Agreements	\$2,165,388	\$1,752,467
Beneficial Interest Agreements	\$34,725	\$34,347

Total Net Assets **\$105,195,121** **\$80,941,409**

Total Liabilities and Net Assets **\$157,452,354** **\$122,503,831**

**All funds are subject to variance power*

FISCAL YEAR 2016-17

(JULY 1, 2016-JUNE 30, 2017)

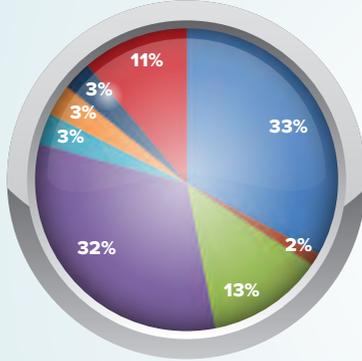
5 YEAR DISTRIBUTION HISTORY (MILLIONS)



5 YEAR GROWTH IN ASSETS (MILLIONS)



2107 ASSETS BY FUND SUB-TYPE



FUND SUBTYPE	ASSETS
Agency	\$51,490,032
Deferred	\$2,371,151
Designated	\$20,210,115
Donor Advised	\$50,322,759
Field of Interest	\$5,402,033
Scholarship	\$5,061,398
Supporting Organization	\$5,054,282
Unrestricted	\$17,076,585
TOTAL	\$156,988,356

TOTAL 2016-17 GRANTS & DISTRIBUTIONS



\$562,631
5.1%



\$2,516,003
22.8%



\$285,058
2.6%



\$960,451
8.7%



\$4,455,416
40.3%



\$410,606
3.7%



\$1,291,051
11.7%



\$537,235
4.9%



\$36,500
0.3%

2016-2017 CFCC COMMITTEES

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Dolly Bodick
Christopher P. Bray
Dennis Brown
Cornelius P. Cacho
Joe B. Cox
Alison K. Douglas
Jeffrey R. Erickson
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Marion T. Forte
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Peggy Blackburn
Christine Flynn
Joanne Fowler
Blake Gable
Mary George
Willie Gorke



“
Coming together
is a beginning.
Keeping together
is progress.
Working together
is success.
”

Henry Ford

Don Grandi
 Anne Hale
 Melissa Hunter
 Pat Jilk
 Jinny Johnson
 Dania Justice
 Charlie Kerwood
 Sherri Knafo
 Jaime Lopez
 Dick Lynch
 Bob McCarthy
 Myles McHale
 Peggy Monson
 Sandy Panther
 Barbara Posner
 Deborah Russell
 Elyssa Smith
 Ben Tiley
 Ellen Vanderburg
 Chris Wells
 Myra Williams

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 Bev Cherry
 Sue Dalton
 Mariana Duncan
 Christine Flynn
 Myra Friedman
 Amy Hale
 Robin Hamilton
 Trisha Hare
 Stacey Herring
 Jill Jaffe
 Liz Jesse
 Jinny Johnson
 Kathleen Kapnick
 Donna Messer
 Brenda O'Connor
 Linda Penniman
 Jackie Pierce
 Karen Ryan
 Sondra Quinn
 Ann Westerfield
 Denise Zutz

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 ex officio members of all committees.*

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 ARIEL CAPITAL ADVISORS, LLC

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 LAIRD A. AND LAURIE D.
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TYPES OF FUNDS

The Community Foundation of Collier County, established in 1985 to increase and focus private philanthropy in the area, has been connecting people who care with causes that matter for over 30 years. Choose one or a combination of funds to meet your charitable interests.

DONOR ADVISED FUND

By creating a donor advised fund, you can organize all of your charitable activities through one expertly managed, cost-effective charitable vehicle. Your gift qualifies for an immediate tax deduction, and you can take your time deciding which organizations to recommend for grants. You'll receive expert advice from the Community Foundation that will provide you with in-depth knowledge to help you set goals, develop your charitable giving strategy and administer grants. Plus you will have online access to it 24 hours a day.

CHANGING NEEDS FUND *(Unrestricted fund)*

Unrestricted funds allow us to respond quickly to our community's needs and to address issues as they emerge. If you do not have a particular charitable field of interest and do not want to be involved in the details of grantmaking, donating to our unrestricted fund is a perfect choice.

FIELD-OF-INTEREST FUND

If you have a particular charitable passion, but do not want to be involved in the details of grantmaking, consider donating to a field-of-interest fund. We manage field-of-interest funds in several areas—arts, environment, healthcare and mental health, human services, basic needs, and at-risk women and girls—and request grant proposals from nonprofit agencies to guide our funding in these areas.

DESIGNATED FUND

Designated funds are a way you can provide a steady, long-term source of income for a nonprofit agency that you care about. Because your gift is given through the Community Foundation, it provides that agency with funding, as well as planned giving and investment management services.

SCHOLARSHIP FUND

When companies, organizations, families or individuals establish a scholarship fund with us, they give deserving students the opportunity to pursue academic dreams. Establish a legacy, honor a loved one or give back to your community or your alma mater. We will work with you to create and administer your fund.

AGENCY FUNDS

Nonprofit agencies establish these funds to build their "reserve" and ensure a long-term, dependable source of operating revenue. Nonprofit organizations can choose to have their fund endowed or non-endowed. Our staff helps the agency with investment management and administrative details.

MAKE THE COMPARISON

DONOR ADVISED FUNDS

- ▶ No setup fees.
- ▶ No annual distribution is required.
- ▶ No excise taxes.
- ▶ Choose to make grants anonymously, if you prefer.
- ▶ Have access to our grantmaking staff.
- ▶ Setup time is short and handled by our staff.
- ▶ Administration is pooled; annual fee is charged; we handle reporting.

INCOME TAX DEDUCTIONS

- ▶ Cash: up to 50% of adjusted gross income (AGI).
- ▶ Appreciated publicly traded stock: fair market value up to 30% of AGI.
- ▶ Long-term real estate and other securities: fair market value up to 30% of AGI.

VS.

PRIVATE FOUNDATION

- ▶ Setup costs include legal, accounting and filing fees.
- ▶ Annual distribution of 5% required by the IRS.
- ▶ Excise tax on net investment income.
- ▶ Tax return with grant listing is public; published in Guidestar.
- ▶ You must research potential grants and bear the expense of staffing the foundation.
- ▶ Requires legal counsel; takes time to establish.

Note: IRS regulations can change from year to year. Consult your professional advisor when making a decision regarding tax deductions and contributions.

COMMUNITY FOUNDATION FUNDS

Community Impact Fund (Changing Needs Fund)
 Program & Operations Fund (CFCC)
 Arts Fund
 Environment Fund
 Basic Needs Fund
 Disaster Relief Fund
 Education Fund
 Healthcare & Mental Health Fund

AGENCY ENDOWMENT FUNDS HELD BY THE CFCC

ANIMALS

Humane Society of Collier County

ARTS/CULTURE

Big Cypress Chapter Daughters of the American Revolution
 Classic Chamber Concerts
 Golisano Children’s Museum of Naples
 Gulfshore Opera
 Marco Island Center for the Arts
 Naples Concert Band
 Naples Historical Society
 Naples Music Club
 Naples Orchestra and Chorus
 Naples Players KidzAct
 Opera Naples
 SWFL Symphony Orchestra and Chorus
 United Arts Council

EDUCATION

Able Academy
 Champions For Learning
 Collier Child Care Resources

- ▶ Ongoing annual legal and accounting expenses and filing fees.
- ▶ Annual 990-PF IRS tax form must be filed.

INCOME TAX DEDUCTIONS

- ▶ Cash: up to 30% of AGI.
- ▶ Appreciated publicly traded stock: fair market value up to 20% of AGI.
- ▶ Long-term real estate and other securities: deductible at cost basis.

Collier County School District Entrepreneurship Program
 Community School of Naples
 Founders Fund
 Friends of the Library of Collier County Foundation
 Fun Time Early Childhood Academy
 Grace Place for Children & Families
 Guadalupe Center
 Junior Achievement of Southwest Florida
 Literacy Volunteers of Collier County
 New Horizons of Southwest Florida
 RCMA
 St. Ann School Foundation

ENVIRONMENT

Conservancy of Southwest Florida
 Everglades Foundation
 Friends of Rookery Bay
 Naples Botanical Garden

HEALTH

Alzheimer’s Support Network
 Avow Hospice
 Cancer Alliance of Naples
 David Lawrence Foundation
 Mental Health
 Golisano Children’s Hospital of SWFL
 Mental Health Association of Southwest Florida
 NAMI of Collier County
 Planned Parenthood of Southwest and Central Florida
 Senior Friendship Centers Foundation

HUMAN SERVICES/BASIC NEEDS

Angels Undercover
 Baby Basics of Collier County
 Catholic Charities of Collier County
 Children’s Advocacy Center of Collier County
 Collier County Florida Special Olympics

Collier Harvest Foundation
 Dr. Piper Center for Social Services
 Foundation for the Developmentally Disabled
 Goodwill Industries of Southwest Florida
 Greater Marco Family YMCA
 Greater Naples YMCA
 Habitat for Humanity of Collier County
 Harry Chapin Food Bank
 The Immokalee Foundation
 JFCS of Southwest Florida
 Laces of Love
 Lighthouse of Collier, Inc.
 Meals of Hope
 Project Help
 Shelter For Abused Women & Children

PHILANTHROPY & VOLUNTEERISM

The League Club
 Marco Island Rotary Club
 Foundation, Inc.
 Naples Junior Woman’s Club
 Naples Lions Club
 The Rotary Club of Naples

RELIGION

Celebration Community Beach Church
 Moorings Presbyterian Church
 Naples Jewish Congregation
 Temple Shalom

WOMEN & GIRLS

Women’s Foundation of Collier County
 Women’s Fund of SWFL

YOUTH & CHILDREN

Collier County Junior Deputies League, Inc.
 Friends of Foster Children Forever
 Girl Scouts of Gulfcoast Florida, Inc.
 Naples Children & Education Foundation

Funds held by the Community Foundation of Collier County as of August 17, 2017. For more information, please call **239.649.5000** or visit **cfcollier.org**

The funds listed above are owned and managed by the Community Foundation of Collier County (CFCC). Your gift will be invested in an endowment fund to support the agency. The CFCC retains the explicit authority to redirect the funds to another beneficiary without prior approval if the agency ceases to exist or if distribution to the organization becomes unnecessary, impossible or inconsistent with the needs of the community.

A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE 1.800.435.7352 WITHIN THE STATE OR AT WWW.800HELPFLA.COM. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE. 100% OF EACH CONTRIBUTION IS RETAINED BY THE FOUNDATION. CFCC SOLICITATION REGISTRATION NUMBER IS CH327

BMO Private Bank



BMO Private Bank is proud to support the Community Foundation of Collier County. Giving back to our community is an important part of what we do and the fabric of our corporate culture.”

-AMY HALE,
MANAGING DIRECTOR, NAPLES OFFICE

BMO PRIVATE BANK'S COMMITMENT to the communities it serves extends far beyond serving its client's financial needs. BMO is dedicated to making a difference in the lives of women. BMO has created a specialized banking division to serve women customers who manage their own money and a task force to help eliminate barriers in the workplace for women. The organization has also conducted research and developed programs to educate women on relevant issues. Last year's topic: Preparing the Next Generation.

Established in 1817, BMO Financial Group is a highly diversified global financial services organization based in North America. The bank offers a broad range of retail banking, wealth management and investment banking products and services to more than 12 million customers.



801 Laurel Oak Drive, 6th Floor, Naples, FL 34108
239-592-2470 | bmoprivatebank.com

Bond, Schoeneck & King, PLLC



An important part of the fabric and culture of Bond is to strive to make a positive impact in the communities where we work and live. Being a corporate partner of the Foundation moves us toward achieving that goal.”

-JIM MOREY,
ATTORNEY, BOND, SCHOENECK & KING, PLLC

THE COMMUNITY FOUNDATION IS A BEACON in Collier County by providing information, guidance and foresight required to understand the critical needs of the community and the programs, services and investments necessary to meet those needs. Bond is proud to be a corporate sponsor of the Foundation. Our lawyers and staff are dedicated to serving the communities in which we live and work. Supporting the Foundation is a perfect way to accomplish that goal.

Equally dedicated to assisting our clients to achieve their goals, Bond represents clients in southwest Florida with commercial lending, real estate development, estate planning, not for profit organizations and commercial litigation. The professionals at Bond look forward to continuing our sponsorship of the Foundation and to the continued dedicated service to our clients and the community.



Commitment • Service • Value • Our Bond

4001 Tamiami Trail N., Suite 250, Naples, FL 34103
239-659-3800 | bsk.com

Ciccarelli Advisory Services



Our community is a direct reflection of our core values, our collective good will and our shared commitment to the future. The enduring partnership between Ciccarelli Advisory Services and the Community Foundation empowers our client families to sustain their legacies for generations to come.”

**-KIM CICCARELLI KANTOR,
PRESIDENT & CO-FOUNDER**

AT CICCARELLI ADVISORY SERVICES, we understand that a community is greater than the sum of its parts. Rather, our community creates a powerful bond between families – uniting all of us behind the common goal of long-term growth, prosperity and wellness.

Our team of advisors is dedicated to fulfilling the altruistic vision of our client families. Throughout our 34 years of engagement within the Naples community, we have witnessed the positive reverberations of our clients’ generosity and commitment to the greater good.

As we continue to guide our clients towards meaningful philanthropy, the Community Foundation of Collier County provides us with the foundational knowledge and resources to build legacies that span numerous generations. We are proud of our continued partnership with the Community Foundation.

CICCARELLI
ADVISORY SERVICES, INC.

Family Focused Wealth Management

9601 Tamiami Trail N., Naples, FL 34108
239-262-6577 | casmoneymatters.com

Gulfshore Insurance



Giving back to the community is an everyday part of what we do at Gulfshore Insurance. Our corporate commitment is complemented by the individual and group efforts of our employees, who are known for their generosity towards causes they believe in.”

**-BRAD HAVEMEIER,
PRESIDENT**

GULFSHORE INSURANCE RECOGNIZES that healthy, thriving communities depend on involved citizens, organizations, and corporate partners for momentum. As a community-based agency, we are committed to creating meaningful change in Collier County through community leadership, employee volunteerism, and fundraising support. The Gulfshore Insurance “Helping Hearts, Helping Hands” Humanitarian Foundation places emphasis on not-for-profit programs that serve the needs of our local community. Every community has its own challenges, and we always strive to be part of the solution!

Gulfshore Insurance has been building relationships and trust in Southwest Florida for over 45 years. Today, we have more than 130 professionals working to assist our clients manage their business and personal risk.

**GULFSHORE**
INSURANCE®

4100 Goodlette Road N., Naples, FL 34103
239-261-3646 | gulfshoreinsurance.com

Huntington Private Bank



Huntington Private Bank is once again honored to be a corporate partner with the Community Foundation of Collier County. Huntington values our long-term relationship with the Community Foundation and we are excited to be part of the dynamic growth of this great community.”

**-KEN THOMAS, CFA, CFP®,
VICE PRESIDENT, SENIOR PORTFOLIO MANAGER**

WHEN YOU INVEST IN THE COMMUNITY, the returns are guaranteed.

At Huntington, we know how important it is to give and be invested in the community. After all, we do more than just work here—we live and raise our families here too. With everything this community has done for us, we are very pleased to have the opportunity to be involved with commitments in many ways.

Our Founders statement has proven true for over 150 years, it has served us well and it is true for Naples. “In Prosperity Be Prudent; In Adversity Be Patient” P.W. Huntington.

Since 1866, Huntington has been serving generations of individuals, families, small and large businesses and communities. We provide full-service consumer and commercial banking services, as well as wealth management, treasury management, equipment financing, automobile financing, trust services, brokerage services, commercial real estate financing, insurance programs and other financial products and services.



Welcome.™

8889 Pelican Bay Blvd., # 100, Naples, FL 34108
239-594-5900 | huntington.com

Northern Trust



We are dedicated not only to meeting the needs of our clients and shareholders, but giving back to the communities we serve.”

**-CHARLIE MUELLER,
WEST FLORIDA PRESIDENT**

AT NORTHERN TRUST, philanthropy is a key component of corporate social responsibility, which includes a focus on community affairs, diversity and inclusion, environmental awareness and socially responsible investing. Northern Trust is honored to be a Corporate Partner with the Community Foundation of Collier County. We are pleased to support an organization so beneficial to a broad spectrum of organizations.

In addition to Northern Trust's local corporate contributions, Northern Trust employees have personally given of their time, talent and funds to help support the substantial range of worthy organizations which benefit our southwest Florida community.

Northern Trust remains fully focused on providing our clients, respected local professionals and community organizations with integrated wealth management solutions of financial planning, investment management, private banking and trust and estate services.



Park Shore: 4001 Tamiami Trail N., Naples, FL 34103
239-262-8800

Downtown: 405 Eighth Street S., Naples, FL 34102
239-262-5560 | northerntrust.com

SunTrust Private Wealth Management



SunTrust Private Wealth Management aims to provide confidence for whatever life brings to our clients. Proud to serve families with our strong capabilities in wealth management, family office services and institutional solutions; our team brings complexities into focus and provides a clear financial picture.”

—DEB MINNICK,

SENIOR MANAGING DIRECTOR SOUTHWEST FLORIDA

YOU’VE PROSPERED BY TRUSTING your instincts. You know when to seek expert advice without giving up control and make certain your interests are well represented.

SunTrust Private Wealth Management has the expertise to help clients look beyond the portfolio. Solid, long-term investment results are expected, but taking the time to learn your needs, wants and aspirations is what sets us apart.

The combination of local experts with access to global wealth management expertise allows SunTrust Private Wealth Management to take a holistic approach to your financial well-being. Providing banking, investment management, family office services (delivered by GenSpring Family Offices) and institutional solutions, SunTrust Private Wealth Management has the expertise to understand your unique needs.

Our teams work closely with you, guiding you to make confident financial decisions so you can enjoy the moments in life that matter.



801 Laurel Oak Drive, 2nd Floor, Naples, FL 34108
239-598-0345 | suntrust.com/wealth-management

The staff of the Community Foundation of Collier County is ready to work with your company on corporate philanthropy and programs. The Community Foundation convenes, collaborates and connects to help your company make a meaningful impact in this community and around the world.

Creating a **Corporate Advised Fund** with the Community Foundation of Collier County (CFCC) is an easy and efficient way for your company to give back. Your corporate committee makes recommendations on all grants to charities. We manage the fund administration, investments and vetting of the nonprofit organizations for you. Our staff may also partner with you to design a program that is uniquely tailored to your objectives and culture.

Positive growth in any community begins with its young people. CFCC can help you start a **Corporate Scholarship Program** to defray the cost of higher education for employees and their family. Funds can help students from a particular school or area, provide financial assistance to those pursuing a specific field of study or assist those most in need.

Although it is impossible to predict Collier County’s future challenges, you can help the Community Foundation ensure our community has the resources to meet the unimagined needs of generations to come. The Community Foundation has many ways your clients can donate to our **Changing Needs Fund** to make a lasting impact on our community

We can help you establish a corporate advised fund, corporate scholarship, or contribute to the Changing Needs Fund. **Call the Community Foundation at 239-649-5000 to start the conversation.**

The staff of the Community Foundation of Collier County is ready to work with your company on corporate philanthropy and programs.



LEAVING A LEGACY

THE LEGACY SOCIETY is comprised of members who have included the Community Foundation of Collier County in their estate plan. The Legacy Society provides awareness to the general public about philanthropic opportunities that exist to sustain the future of our community while creating a family legacy.

Including the Community Foundation in your estate plan is easy. You can simply include a few lines about the percentage of your estate or trust, sum of money, life insurance, or property you would like to donate. You can also name additional beneficiaries. Contact our expert staff at the Community Foundation to start the conversation.

Ms. Patricia Aiken-O'Neill
Mr. and Mrs. Marcelo Alvarez
Mr. Francis A. Baker
Ms. Bridget Bannon
Mr. Garry N. Bean
Mrs. Jane Billings
Ms. Huguette L. Castaneda
Mr. Ansel M. Chandler
Mrs. Patricia A. Daniel
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Mr. and Mrs. Samuel L. Finkelstein
Mr. Richard G. Ford
Mrs. Patricia A. Forkan
Dr. Howard L. Freedman
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Eileen Connolly-Keesler
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The Community Foundation of Collier County has been connecting people who care to causes that matter since 1985. We are here for you, for your family, for the nonprofits you support and love, for your community—for good and forever.



(L-R): Dawn Grundeman, Ann Hughes, Eileen Connolly-Keesler, Cindi Withorn, Eric Kingsley, Marsha Lewis, Carri Kreisman, Lisette Holmes, Mary George, Sharon Bayata

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