



2012 Annual Report


\$600,000 Distributed

16% Growth, 11% Return

2012 Overview: Chisholm Trail Communities Foundation (CTCF) was founded in Georgetown, Texas, in 1996, with the mission to help donors achieve their philanthropic goals. Rather than supporting one primary issue/community need, CTCF provides the structure that allows individuals, families, and businesses to simplify their giving yet retain the flexibility to support specific charitable purposes meaningful to them—we act as a bridge between donors and area nonprofits.

In 2012, invested assets achieved higher than an 11% return and total assets under management grew by 16% to over \$1,500,000. Additionally, in excess of \$600,000 was distributed through CTCF to support the programs and missions of nonprofits. These distributions came primarily from two types of Funds at CTCF: 1. Donor Advised Funds—similar to “mini-foundations” for individuals, families or businesses; and 2. Donor Designated Funds—which includes an “incubator” program for smaller and/or new nonprofits. For the Funds that qualified and chose to invest their charitable dollars at CTCF, a return of over 11% was achieved. This return is tax-free growth which further supports charitable work in the community.

 [CTCF on Facebook](#)

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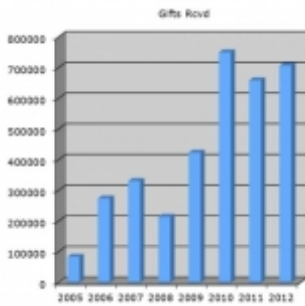
[Fast Pitch for Nonprofits](#)

DEADLINE 8-8-13 to apply - Grants of \$21,500

2012 was the start of something BIG – the CTCF Fast Pitch for Nonprofits competition! **Community members**--mark your calendars for this exciting and informative evening, **Nonprofits**--submit your application ASAP!

Competition Details:

The Fast Pitch allows community members to efficiently learn about



Gifts Received

Historical view:

Chart above accounts for 2005 - 2012 gifts received by Chisholm Trail Communities Foundation. In 2012, these gifts totaled over \$700,000!



Board of Directors

2013 Board Members:

Dr. Nelson Avery

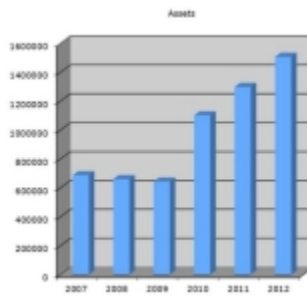
Jeff Baker

Ray Barron, *2013 Chr*

Karen Cole

Howard Faske, *Trsrer*

Ron Greening



Assets

The assets of CTCF (listed above 2007 - 2012) include those of the supporting organization, the Future Trails Fund (FTF) and surpassed \$1.5 million in 2012. The FTF was established with the donation of the CTCF office building by the W.

D. Kelley

Foundation. The building is located on the Georgetown Square and continues to provide support through rental income of additional office space.

Office space is

available, so if you are in need of a local office with a great location, please contact the office at (512) 863-4186.

specific projects of area nonprofits in a competitive, but friendly and exciting environment. The competition has 2 rounds: ROUND 1 is a **written application** (with a DEADLINE to apply of August 8, 2013); and ROUND 2 consists of **90-second verbal presentations** evaluated by a judges' panel and the audience (the event is FREE to attend and open to the public).

10-10-13, will be Round 2 of the 2nd Annual competition (the 90-second presentations), and we are anticipating over 300 people to attend! EACH member of the audience will be given the opportunity to vote for their favorite presentation of the evening for the **\$4,000 People's Choice Award**. The other awards include **1st--\$10,000, 2nd--\$5,000 and 3rd--\$2,500**, and will be scored/evaluated by our panel of judges.

Doug Groves, *Chr-elect*
Janet Hewlett
Hayden Johnson
Paul Jordan, *2012 Chr*
Lynne Moore
Gary Newman
Bill Sattler
Dr. Michael Weir,
*Managing Dir. (volunteer
position)*



Contact us:

www.chisholm-trail.org

[CTCF on Facebook](#)

Fax (512) 863-2484

Email to:

friends@chisholm-
trail.org



CTCF Staff

Here to serve YOU:

Dr. Michael Weir,
Managing Director
(Volunteer position)

Lynn Willis,
Ofc. Secretary
Diane Lint,
Accountant

Julie Johnson,
Project Mngr. for
Development and
Communications

CTCF Investment Committee

Dr. Michael Weir
Jack Garey
Barry Haag
Larry Hemenes

**MARK YOUR
CALENDAR for 10-10-
13!** Visit the [CTCF web
site](#) for further details.



Advertise at the Fast Pitch

Be a part of the action:

Sponsorships are still
available for the Fast
Pitch event, [click HERE](#)
for more details.

Join With Us

If you would like to meet
the needs and
opportunities for
charitable work in
Williamson County
communities by
financially supporting
CTCF, go to
www.chisholm-trail.org
and click the "Donate"
button. Gifts are tax
deductible. *(CTCF is a
charitable organization,
IRS Cod 501(c)3
nonprofit.)*



At CTCF, we like to describe our organization as a **resource bridge** between donors and area nonprofits, if we may be of service to you or your organization, please don't hesitate to contact us!

A. Services for **Nonprofit Organizations**: Sustainability

Are you an area nonprofit seeking to build a sustainable future? Contact us about our services for endowment and agency funds to achieve your long-term goals.

B. Services for **Donors**: Top 5 Reasons to Open a Donor Advised Fund

1. **SIMPLIFY your tax deduction** - Make one donation to your Fund, take the immediate tax deduction and then enjoy distributing the money at your leisure—over weeks, months or even years to come. This eliminates inadvertently double-counting or missing a charitable deduction because the donations have been consolidated in your Fund.

2. **DOUBLE your giving** - Many employers (and even former employers) provide generous charitable matching programs for both dollars donated and time volunteered to nonprofit organizations. Contributions to your Donor Advised Fund at CTCF qualify for this match.

3. **Charitable dollars grow TAX FREE** - If the Fund balance is over \$10,000, it can be invested and your Fund grows tax-free.

Example —Current Fund: This Fund started investing in 2006 with \$30,000; \$1,300 in deposits was made to the Fund and approximately \$10,000 (in grants and fees) was subtracted from the Fund. The balance would have been close to \$21,300, but because they chose to invest the funds with CTCF, there was net growth of almost \$13,000 and

the Fund now stands at just under \$34,000.*

4. **AVOID Capital Gains or Ordinary TAX** - If you have proceeds from a stock sale that you are planning to donate, be sure to consider gifting the stock directly to your Fund. Instead of selling the stock, paying taxes and then being left with a *smaller* amount to donate, verify how long you have owned the stock. You may not have to pay capital gains tax if you have owned the stock *longer than one year* or ordinary tax if *less than one year* when you gift the stock directly to your Fund.

5. **GIFTS that keep giving** - Invite family and friends to donate to your Fund in lieu of birthday, anniversary or holiday gifts, and then experience the joy of giving to organizations that support the causes most meaningful to you.

For more information about Donor or Nonprofit Services available at CTCF, call or email Julie Johnson at (512) 863-4186 or juliejohnson@chisholm-trail.org.

*Reminder: Information herein is not intended to be legal or tax advice. You should consult with your own attorney and tax advisor for your specific circumstances. Past returns are no guarantee of future performance.