

Chisholm Trail Communities Foundation 2022 Annual Report



*Deep Roots in Georgetown,
Still on the Square.*



*Fostering Georgetown Area
Philanthropy since 1998*

Dear Fund Manager Clients, Former Directors, and Friends-

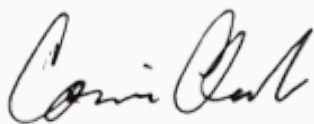
This is a special year, our 25th Anniversary, and we are sending an expanded edition to Thank You for making it possible for all of us to now look back over the last quarter century and see such a remarkable record of community service. **Our philanthropic fund donor clients are the real heroes,** whose generosity, combined with the dedication and leadership of our past and present directors and staff have enabled Chisholm Trail Community Foundation to become such a major source of funding for worthy, mostly local, causes.

As the first community foundation in the county, we commenced business in 1998 as the Georgetown Area Community Foundation. The founders foresaw an opportunity to offer a unique set of services that would foster the philanthropic efforts of local people who wanted to better the community. Since its founding CTCF has benefited greatly from the wisdom and leadership of the seventy two directors who have served us over the years. **Yes, we are much larger now (at over \$30 million in assets), but we still have highly dedicated, local leadership, still focused on the betterment of the city and area we all love.**

Thank you all for your generosity, time, work, and loyalty. Let's continue to do it together. Let's continue the record of this wonderful old local institution—providing major positive impacts on the lives of Georgetown area people.

We look forward to the next 25 years of Fostering Georgetown area Philanthropy with great optimism and great resolve. We will continue to be a highly focused, truly local business providing high quality, affordable services that promote philanthropy. The biggest winners are the charities and the people in need, and yes, all the people of the Georgetown Area.


Chisholm Trail Communities Foundation



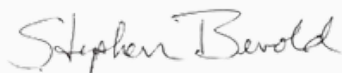
Connie Clark
Board Chair



Chris Price
Treasurer, Secretary



Tom Faragher
Managing Director



Stephen Benold, MD.
Immediate Past Chair



Mike Weir, MD.
Managing Director Emeritus



Andrea Denton
Board Member



Eric Cooper
Board Member



Joseph Greer
Board Member



Katie Rinehart
Board Member



Bob Villarreal
Board Member



Diane Lint
Senior Manager of
Finance
and Operations



Danielle Casey
Program and Administration
Coordinator



Donna Stubblefield
Office Administrator

OUR LOGO IN PRACTICE

Much like a bridge, the Chisholm Trail Communities Foundation connects two groups, our donors and community members on one side of the bridge, to nonprofit organizations and worthy individuals on the other. The bridge represents the specialized array of offerings and services geared to foster philanthropy. The result is the overall betterment of the community.

OUR MISSION

The mission of Chisholm Trail Communities Foundation is to bridge donors to nonprofits with effective solutions to meet real community needs in Williamson County.



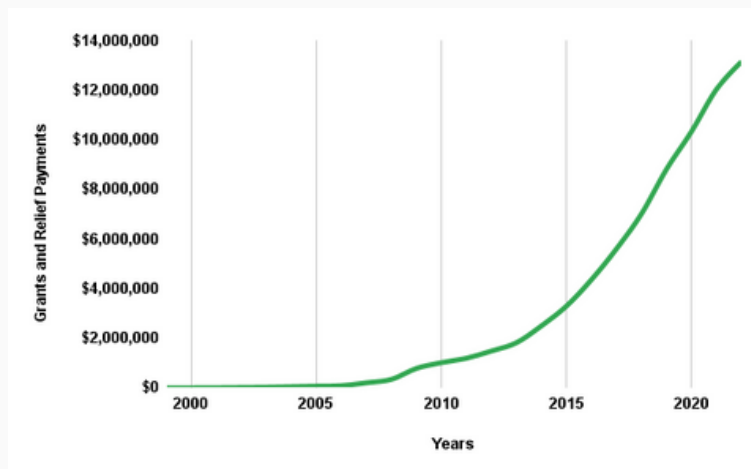
KEY FINANCIAL RESULTS

IN OUR 25th YEAR ALONE

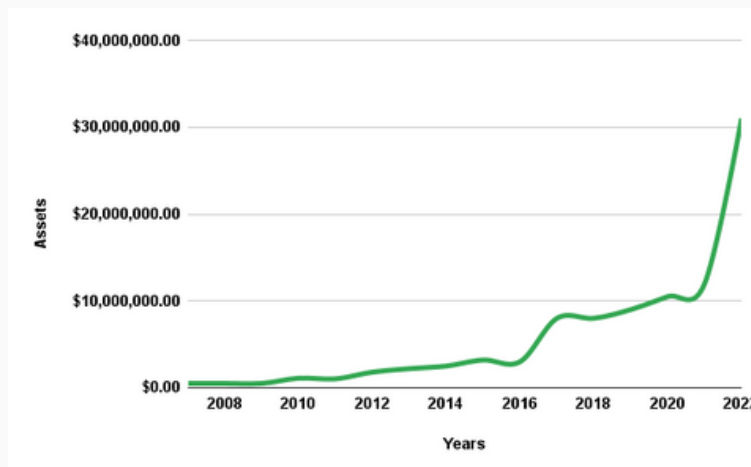
- Inflow: over \$22 million was gifted to CTCF by our donor clients for investment management and administration for future disbursements
- Outflow: over \$1.7 million disbursed to worthy causes in grants and relief payments

CUMULATIVE GROWTH OVER OUR 25 YEAR HISTORY

- Assets under management: over \$31 million
- Outflow: over \$13.7 million in grants and relief payments distributed by our fund managers

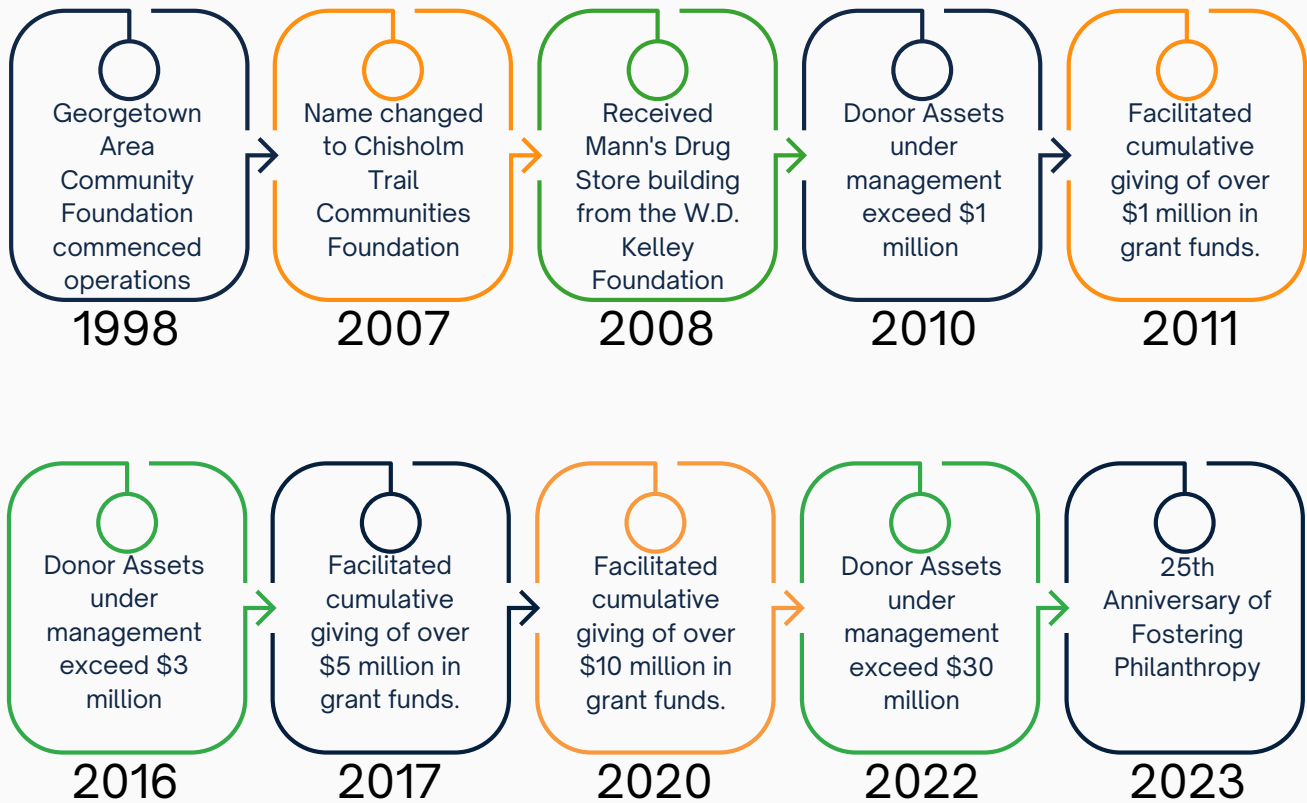


Cumulative Totals



Cumulative Totals

A TRIP THROUGH TIME



1996-2006



2007-2015



2016-Now



THE REAL HEROES: OUR FUND MANAGERS

Our impressive record of **\$13.7 million** in grant and relief payments was **generated by YOU, our wise, generous and loyal fund manager clients.** CTCF is extremely proud to have facilitated your philanthropic efforts over the years. We look forward to the next 25 years of bettering the quality of life in the area where we work and live. We respect the desire of many of our funds to remain anonymous. But we know your commitment, and can be justly proud of being an integral part of the great results. **THANK YOU ALL!**

AGENCY FUNDS

Friends - Georgetown Public Library
The Georgetown Project Endowment
Williamson County Children's Advocacy
Center

DONOR DESIGNATED FUNDS

CTCF Board Designated Fund
Backpack Buddies Fund
Exceptional Georgetown Alliance Fund
Georgetown Fire Department
-Pipes & Drums Fund
Institute for Excellence in Nonprofits Fund
Jonah Community Fund
Lone Star (TX) Chapter of The Links
Ride on Center for Kids (R.O.C.K.) Fund
Snead Institute Fund
Sun City Rotary Club of Georgetown
-Breakfast with Santa Fund
-Permanent Endowment Fund
Williamson County Mayor's
-Prayer Breakfast Fund

SCHOLARSHIP FUNDS

Clara Stearns Scarbrough Music
Darrell Bishop Memorial Engineering
Dr. Roy B. Shilling Scholarship
Georgetown Promise Scholarship-GPS

Madelyn Grace Shoales "Trainer Maddy"
-Memorial Fund for Athletic Training
Ned Snead Memorial Scholarship
Phillip King Tennis Scholarship

DONOR ADVISED FUNDS

Arnold & Placek Corporation
Bandy Charitable Fund
The Cleveland Family Charitable Fund
D3Kinney's Fund
David and Connie Clark Fund
Dr. Billy & Sandra Ward Fund
Edward & Helen Jenkins Memorial
Esther Weir Charitable Fund
Garey Park Fund
Greenlees Charitable Fund
Iva Wolf McLachlan Endowment Fund
Michael & Dawn Pehl Giving Fund
Mike & Ann Weir Charitable Fund
Molly & David Stacey Fund
Moore Charitable Fund
Richard & Rita Petro Charitable Fund
Robert & Joan Maier Charitable Fund
Rockwell Giving Fund
Shepherd Family Charitable Fund
Sport Clips Philanthropic Fund
Teresa Miller Fund
Tracey Weir & Hayden
Johnson Charitable Fund

A MOMENT OF THANKS TO THE MANY DEDICATED PEOPLE WHO HAVE LED US

Scott Alarcon
Nelson Avery
Jeff Baker
Ray Barron
Dr Stephen Benold
Jim Bolton
William Booth
Barbara Brightwell
George Brightwell
Bob Brent
Joel Broussard
Carlie Burdett
Carole Burke
Sharon Caskey
Connie Clark
Karen Cole *
Eric Cooper *
Laura Hansen Dean
Andrea Denton
Richard Eason
Susan Erickson
Tom Faragher
Marsha Farney
Howard Faske *

Cammy Garey *
Jack Garey
Gary Giddings
Gaz Green
Ron Greenling *
Joseph Greer
Doug Groves *
Barbara Hallmark
Jim Haskell
Dr Jim Hensley
Janey Hewlett *
Greg Hooser
Hayden Johnson *
Paul Jordan
Pat Katt
Eugenia Koog
Bettye Logan
Chris Logue
Sherri Madden
Judith Manriquez
Liz Mealy
Jim Mills
John Montgomery
Lynne Moore

Lynn Morris
Skip Morse
Gary Newman *
Norm Peters
Chris Price
Katie Rinehart
Susan Richmond
Mary Rodriguez
Hank Rothell
Bill Sattler
Dr. Jesse Sawyer
Dr. William D Sawyer
Ron Shelly *
Jenni Shield
Dr Jake Shrum *
Marlene Small
Sherron Snead
Holly Stevens
Richard Styles
Chrystle Swaim
Bob Villarreal
Mike Weir, M.D. *
Libby Wood
Todd Woods

Key

Bold= Board Chair

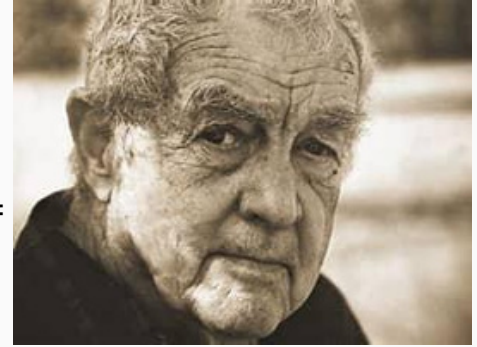
Italics = Founding Director 1998

**= 10 or more years on the board*

EXPRESSING OUR GRATITUDE

2008 The Gift of Our Building

The mission of the W.D. Kelley Foundation is to improve education and human services in Williamson County. W.D. Kelley was a client of Georgetown estate planning attorney Dale Illig. Mr. Kelley had no family, so upon Kelley's death in 1996, the W.D. Kelley Foundation was formed with Dale as the president. Mr. Kelley was an unassuming man who had little interest in money. The fascinating story, which you can watch at wdkelley.org/video/, involves a modest but determined man, a caring and able attorney, a contested will, and a condemnation.



W.D. Kelley

The result was a Foundation that has made grants of over \$8 million dollars to area causes. It operates with an Invitation-Only grant process.



Dale Illig

Among those grants was the gift to CTCF of the Mann's Drug Building on the Square, which became our headquarters. We gained a permanent home, and also earn income from the suites we rent out to local tenants.

We love our home on the Square! CTCF expresses deep appreciation for Mr. Kelley,

Mr. Illig and the W. D. Kelley Foundation. Since receiving the building in 2008, CTCF has distributed over \$13 million. The vast majority was to education and human services in Williamson County, the stated mission of the Kelley Foundation. We trust Mr. Kelley would be pleased.



Mann's Drug
Building circa 1984

2022 Garey Park: The Gift of a Lifetime

Alan “Jack” Garey passed away March 18, 2022 at the age of 92. His third wife, Doris Breaux Garey, was by his side when he passed away at home. He was preceded in death by his wife, Camille “Cammy” Blackmore Garey, in 2012.

In 1966 the Garey family bought a beautiful 525 acre ranch located just west of Georgetown along the South San Gabriel River. They lovingly developed it over the years, and built themselves a home there in 1995. Jack had always wanted to eventually make the ranch available so everyone could enjoy it.

Jack and Cammy were very generous to local worthy causes, and each served on many Georgetown area nonprofit boards. Cammy joined the Chisholm Trail Communities Foundation board in 1999 and helped lead us for thirteen years, including a year as chair. Jack was also on the board.

In 2004 the 525-acre ranch plus \$5 million dollars was donated to the city for the development of a park. **The land will be used exclusively as a public park and recreational facility in perpetuity.**

Jack was active in the planning of the park and its extraordinary array of amenities. Garey Park opened in 2018 as Georgetown’s flagship park, and is roughly 1.5 times the size of Zilker Park in Austin. **Per Jack’s will, \$21 million from his estate was donated to the Garey Park Fund at Chisholm Trail Communities Foundation in 2022.** CTCF is managing the Fund and working with the City to assure the development of the park in accordance with his wishes.



Jack and
Cammy Garey

The Garey gifts comprise the largest gift in the history of the City. On behalf of all of Georgetown, a heartfelt THANK YOU TO THE GAREY FAMILY! Your exceedingly generous gifts will stand forever as a monument to a great and generous family. CTCF is very proud to have a role in the completion of this wonderful park.



Garey Park

2022 Mike Weir steps back from Managing Director Role

Mike Weir has been a major guiding leader of CTCF since joining our board in 2008 and served as chair for two years. He was then named Managing Director and wisely and effectively served in that position until he decided to step back at year end 2022. **He remains very active on the Board and serving as an advisor to the staff.** He has been named CTCFs Managing Director Emeritus.

We owe a huge part of our success to Mike. When he was named chair, CTCF assets under management were approximately \$700 thousand. When he stepped back as managing director at last year end, assets under management had grown to \$31 million. *An astounding record!* In recognition of his strong commitment and excellent leadership, the Board and staff placed a plaque in our headquarters conference room in his honor.

Mike was born in 1942 and got his BA at Harvard, went to medical school at UT where he earned his MD and joined the US Army. After 25 years in the US Army, he retired as Colonel. He returned to Georgetown to practice as a pediatric nephrologist/hospitalist at Scott and White and was a professor at the TAMU School of Medicine. He is active in many charitable causes. We express profound thanks to Mike!



FROM OUR MANAGING DIRECTOR

Tom Faragher is from Seattle, and earned a BBA from the University of Washington and an MBA from Stanford Business School. During his 30 year financial career he served as CEO of three small banks, including two during his 14 years with Texas Commerce Banks.

In 1997, desiring to "give back," he began thirteen years as Administrative Director of the Land Trust of Napa County. He then retired and he and his wife, Ana Cristina, fulfilled their wish to move back to Texas.

"We loved Texans and Central Texas. We moved to Georgetown fourteen years ago for its special small town charm," he stated.



"I joined the CTCF board in 2020, excited that my nonprofit management experience would to be put to good use in such a successful local philanthropic organization. I feel honored to step into this new role. Yet, Mike's record is an extremely hard act to follow! Mike is great to work with. With our active and able Board, our capable and dedicated staff, and our many loyal and generous clients, I am confident the future will continue to be bright." - Tom

A SPECIAL THANK YOU TO OUR STAFF MEMBERS:

Danielle Casey

Diane Lint

Donna Stubblefield

CTCF WOULD ALSO LIKE TO THANK OUR FORMER STAFF MEMBERS:

Fred Bleeke

Sheila Mitchell

Ida Holden

Lynn Willis

Tamara Hudgins

Todd Wright

Julie Johnson



WANT TO LEARN MORE?

FOUNDATION PURPOSE AND MISSION- to facilitate philanthropy that enriches, enhances, and builds a better quality of individual lives of the citizens of Georgetown and surrounding communities.

HOW TO GIVE THROUGH CTCF- You first decide that you want to achieve, then how you want to give and what assets you want to contribute all with guidance from your professional advisors. Because we are a public charity, we can offer the most favorable tax treatment possible for your gift. And then call us. Our professional staff will help you select and structure the fund that best meets your needs, and help you develop a meaningful personal giving plan.

The Foundation exercises strict responsibility and provides prudent stewardship of donor funds with a high quality, low cost diverse portfolio mix that minimizes risk and enhances the likelihood of solid conservative returns.

For more information please contact us at 512-863-4186 or visit us on the web at www.chisholm-trail.org.

TYPES OF FUNDS

We offer a range of different fund types providing enormous flexibility in fulfilling your charitable objectives. Whether you want to benefit a community, a cause, or many charities, we can structure a fund to meet your need

- Unrestricted Funds
- Designated Funds
- Agency Funds
- Scholarship Funds
- Advised Funds
- Support Organizations