



PHILANTHROPY FOCUS

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SAVE THE DATE

MARCH 28, 2017

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The Carolinas Annual
Meeting

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Photo by Mark Hames

PROFESSIONAL ADVISOR SPOTLIGHT

Q&A with Sandi Thorman

Sandi Thorman, partner at Greer-Walker Wealth Management, is a valuable FFTC partner. As a professional advisor, she encourages clients to consider innovative, efficient ways to incorporate charitable giving in their current and long-term planning.



Sandi Thorman

Q: Describe your relationship with Foundation For The Carolinas

A: My relationship with FFTC has been very diverse. I've served on the FFTC Cabinet of Professional Advisors and am now an active alumni. I've also helped numerous clients create donor advised funds and contribute business interests to the Community Investments Foundation, a subsidiary foundation of FFTC. In addition, I'm involved on the boards of trustees for nonprofits that have endowment assets with FFTC.

Q: What value does your partnership with FFTC bring to your clients?

A: Based on the relationships I've established, I can easily introduce my clients to FFTC's staff. I've assisted many clients with contributions of appreciated securities and business interests. Therefore, I am able to provide the expertise needed in making the transaction efficient and effective. Also, from a fiduciary perspective, I have assurance that the assets are accounted for and invested appropriately. In addition, GreerWalker Wealth Management is part of FFTC's Investment Alliance program, so we manage assets for some of our clients' donor advised funds.

Q: How do you encourage clients to consider giving as part of their estate plans?

A: Charitable planning is top of mind when I talk with clients regarding tax and estate planning. This can range from current charitable contributions to reduce ordinary taxable income prior to retirement; establishing donors advised funds, charitable trusts and private foundations for future charitable giving and leaving a legacy with children; as well as planned giving for leaving a charitable bequest at death.

Q: What would you share with colleagues who haven't yet partnered with FFTC?

A: FFTC is a great resource and partner. Not only can they make connections for clients with organizations they are passionate about, but their extraordinary staff provide the encouragement and tools needed to make a difference in the community in which we work and live.

SEMINARS SHARE EXPERTISE WITH FUNDHOLDERS & ADVISORS

The FFTC Centers for Giving recently hosted two insightful seminars:

In August, Robert Bridges of Sterling Capital Management presented *Staying Rational in Irrational Markets*, a discussion about the fascinating world of Behavioral Finance. This session was open to FFTC fundholders.



Robert Bridges of Sterling Capital Management leads a discussion on behavioral finance.

In October, FFTC Deputy Counsel & Vice President Doug Benson taught *Charitable Gifts of Business Interests*, a Continuing Legal Education course for attorneys that was also open to financial planners and other professional advisors. He explained the legal intricacies involved in helping clients donate closely held business interests to charity.

To learn about upcoming educational programming, visit www.fftc.org/centerevents.

CMS FOUNDATION PARTNERS WITH FFTC

The Charlotte-Mecklenburg Public Schools Foundation recently joined the FFTC family of fundholders. Led by former WCNC anchor Sonja



Sonja Gantt

Gantt, the CMS Foundation's mission is to serve as a trusted bridge between the school system and the donor community. The recently rebranded foundation hosted a breakfast event in September to announce its new strategic vision. The event also kicked off an initiative to generate investment in CMS and support for public education in our region.

"There are so many people to thank at FFTC for their support that I'm not sure where to begin," said Gantt. "Our branding campaign would not have been possible without a grant from the Charlotte Mecklenburg Community Foundation. As the CMS Foundation works to develop a culture of 'schoolanthropy' in Mecklenburg County, the partnership with FFTC has been substantive, impactful and unbelievably valuable."

Charlotte-Mecklenburg Public Schools Foundation is the newest subsidiary of Foundation For The Carolinas. FFTC is proud to partner with the CMS Foundation as they enter this new and exciting phase.

For more information, visit www.cms-foundation.org.

THE SEASON OF GIVING

Foundation For The Carolinas extends our deepest appreciation to our clients, partners and friends during this season of giving. The holidays are an excellent time to leverage charitable tax benefits before the end of the year, while supporting the causes you value most. We hope you will consider making a gift to your fund or establishing a new charitable gift fund today.

FFTC offers a number of fund options to meet your philanthropic needs, such as donor advised funds, field of interest funds and community impact funds. We accept a wide variety of assets, such as stock, real property and closely held business interests.

To learn more about how we can help you achieve your charitable goals, please contact our Philanthropic Advancement team at 704.998.6412 or philanthropy@fftc.org.

Important Year-End Deadlines

Please note: In order for a cash or check gift to be credited in calendar year 2016, it must be received or postmarked by December 31, 2016. Gifts of stock must be received into the Foundation's brokerage account on or before December 31, 2016.

To ensure that grants from your charitable fund are mailed before the New Year, please submit your recommendations by December 22, 2016, for previously approved organizations and December 16, 2016, for new organizations. For assistance, please contact our Donor Relations team at 704.973.4529 or donorrelations@fftc.org.

** The material contained herein is not to be construed as tax or legal advice.*

CROSLAND HONORED WITH LEGACY AWARD



John Crosland Jr.

The Charlotte Chapter of the Association of Fundraising Professionals recently awarded the National Philanthropy Day 2016 Outstanding Legacy Award to the late John Crosland Jr. for his lifelong commitment to affordable housing, education, medical research and other charitable causes.

Crosland's childhood shaped his philosophy of giving. As the son of a builder, he felt passionately about the importance of a safe and secure home for all community members. This translated into a passion for affordable housing and support for those less fortunate, including major gifts to Habitat for Humanity of Charlotte and the Belk College of Business at UNC Charlotte.

Due to his struggles with dyslexia as a child, he also cared deeply about offering quality educational opportunities to children with learning differences. He made one of his largest gifts to what is now the John Crosland School, a K-12 school for students with specific attention and learning differences.

These are just a few examples of his philanthropic giving. In fact, over the years, his generosity has resulted in more than \$7.8 million in grants. In 2002, he established The Crosland Foundation, a subsidiary foundation of Foundation For The Carolinas, Davidson College and Episcopal High School, which receives funding directly from the profits of his namesake company.

For more information on FFTC Subsidiary Foundations, visit www.fftc.org/subsidiaries.



Comet the therapy dog supports the unique social and emotional needs of John Crosland School students.



A gift from the Crosland Foundation helped double enrollment by providing a larger, centrally located building.



The John Crosland School is the ideal place for these Upper School students to build confidence and academic skills for future success.

CIVIC LEADERSHIP 2016 YEAR IN REVIEW

Brian Collier

Executive Vice President



Brian Collier

The Robinson Center for Civic Leadership has seen great progress and some remarkable successes from our initiatives during 2016. We recently held our annual State of the Union dinner for members, an opportunity to provide updates and reflect on our programs and partnerships over the last year. These are a few of the key highlights we shared:

Economic Opportunity

The Charlotte Mecklenburg Opportunity Task Force was founded to study and craft recommendations to improve the economic opportunity landscape in our community. Recently, in partnership with the Knight Foundation, the Task Force hosted Dr. John A. Powell, director of the Haas Institute for a Fair and Inclusive Society at UC Berkeley, as part of our ongoing Leading On Opportunity Series. He delivered a keynote address to more than 500 community members and led workshops on implicit bias for the Task Force and community leaders.

Additionally, Task Force members, community leaders and nonprofit executive directors participated in a two-day Dismantling Racism workshop to better understand the role that systemic and structural racism plays in limiting opportunity for our communities. The Task Force looks forward to publishing its key findings and initial recommendations in early 2017.

Project L.I.F.T.

Now in year four of the five-year initiative, Project L.I.F.T. has made progress toward increasing the graduation rate at West Charlotte High School. With its eyes still set on reaching a 90 percent graduation rate by 2017, Project L.I.F.T. announced the on-time graduation rate at West Charlotte for the 2015-16 school year was 86 percent - an increase from the school's 51 percent graduation rate at the launch of the initiative. While these numbers indicate we're heading in the right direction, there is still work to do toward our overall goal of ensuring students are ready for college and careers.

Read Charlotte

With a goal of doubling third grade reading proficiency from 39 percent in 2015 to 80 percent by 2025, Read Charlotte finalized its strategic action plan in September.



Dr. John A. Powell spoke to a packed house October 17 at First Presbyterian Church in Uptown Charlotte. Powell - a professor at UC Berkeley - discussed implicit bias, economic opportunity and upward mobility.



Task Force leaders Dr. Ophelia Garmon-Brown (left) and Dee O'Dell (far right) lead a discussion with Dr. John A. Powell.



Dr. John A. Powell greets community members following his talk that attracted more than 500 attendees from throughout the community.

Photos by Mark Hames

The plan includes key community indicators, evidence-based proven practices and strategic priorities for the next 12 months. Read Charlotte's approach includes a focus on supporting evidence-based interventions and changing system conditions that prevent programs from achieving their potential. Given that 96 percent of third graders who read on grade level will graduate high school on time, Read Charlotte's work is an important part of our overall plan to improve economic mobility locally.

A Way Home

The A Way Home Housing Endowment is close to reaching the \$20 million endowment goal set for this public/private partnership (\$10 million from the City of Charlotte and \$10 million from private philanthropy). However, \$900,000 is still needed from private philanthropy to match public dollars committed. The plan is for the endowment to be fully funded in 2018, with \$1 million available annually to provide housing subsidies to homeless families, as well as targeted prevention support to at-risk families.

As always, thank you to our generous donors and partners for your support in 2016. You make our work to address our community's most critical needs possible.

For more information, visit www.civic-leadership.org.



Jeffrey Balek (left) received the Nish Jamgotch Jr. Humanitarian Award. Jamgotch (center) and FFTC EVP Brian Collier (right) presented the award.

JAMGOTCH HUMANITARIAN AWARD PRESENTED TO YMCA VOLUNTEER

The Nish Jamgotch Jr. Humanitarian Award was awarded recently to Jeffrey Balek, a volunteer at Y Readers, the YMCA of Greater Charlotte's literacy program for students in grades K-3 who are reading below grade level. The award includes a \$6,000 cash gift, which was presented at a ceremony at the Harris YMCA in July.

"It's a great honor to receive the Nish Jamgotch Jr. Humanitarian Award," Balek said. "Children who don't learn to read well early tend to struggle in school and later in life. I'm glad to be a part of this important program and couldn't do my volunteer work without the people at the Harris YMCA. I thank Foundation For The Carolinas and Dr. Jamgotch for their support of volunteers and programs like ours."

Balek, who was born blind, has been teaching kids to read through the program at Nations Ford Elementary since 2013. He uses specially made braille books that allow him to read as the children follow along the written words in their books. His work as a volunteer has garnered national and state-wide attention for the program, including coverage in *People* magazine and *The Dr. Oz Show*, as well as being honored by Gov. Pat McCrory for his service.

Named for the retired UNC Charlotte professor who established the program, the Nish Jamgotch Jr. Humanitarian Award is facilitated by FFTC and is presented annually to an individual or group that demonstrates exceptional service to the Charlotte-Mecklenburg Community.

Previous award winners include Thereasea Elder, a public health pioneer who was among the first to integrate health care in our region, and Ric Elias, CEO of Red Ventures and an advocate for education opportunities for undocumented youth.

NORTH TRYON VISION PLAN APPROVED



NORTH TRYON VISION PLAN

Mecklenburg County commissioners recently approved the North Tryon Vision Plan, which could lead the way for a major revitalization of North Tryon Street and the surrounding area in uptown Charlotte. The goal is to transform the neighborhood into a vibrant, inclusive center for residents and visitors to work, shop, play and engage.

Foundation For The Carolinas, Charlotte Center City Partners and more than 20 nonprofit, private and government groups combined to create the plan, which will likely develop over several decades.

For more information and to view the entire plan, visit www.northtryon.org.



The proposed future 8th Street, shown above, will function as a smaller-scaled sightseeing/arts strolling street that establishes a quiet pedestrian link to the Fourth Ward.



FFTC Executive Vice President Brian Collier updates RCCL members on the progress of the Charlotte Mecklenburg Opportunity Task Force.

The Robinson Center for Civic Leadership recently held its annual State of the Union event. Highlights included FFTC President & CEO Michael Marsicano's overview of the North Tryon Vision Plan and Executive Vice President Brian Collier's update on the Charlotte Mecklenburg Opportunity Task Force.

The Robinson Center for Civic Leadership is FFTC's flagship program, addressing the most critical needs and opportunities affecting our region. For more information, visit www.civic-leadership.org.

FFTC WELCOMES VICE PRESIDENT OF BOARD MANAGEMENT

Hi, I'm Kindl Detar, and I was thrilled to join Foundation For The Carolinas this summer.



Kindl Detar

As a Cabarrus County native, I am particularly excited by the opportunity to support the work of FFTC within our 13-county regional footprint. Led by esteemed boards of local leaders, our affiliate foundations award grants to local nonprofits based on the most pressing needs in each community. This connection to community – both to needs and nonprofits – enables our affiliates to maximize their grant dollars. It is a privilege to work with these communities, and I'm excited to get started.

Prior to joining the Foundation, Kindl was the Special Assistant to the Director of CVAN Battered Women's Shelter and was an attorney at Robinson Bradshaw and the Office of the Federal Public Defender, Eastern District of North Carolina.

E4E RELIEF PRESIDENT LAURA MEYER WELLMAN RETIRES

Laura Meyer Wellman recently retired as President & CEO of E4E Relief, a role she assumed in early 2014, when the employee disaster relief program was spun off as a wholly owned subsidiary of FFTC. Wellman joined the Foundation in 2002 as Executive Vice President. A celebration was held in October to honor Wellman's many contributions to FFTC and our region.



Laura Meyer Wellman

"This was probably the most difficult decision of my life," Wellman said. "The Foundation is an extraordinary organization, and the ability to lever years in U.S.-based and international financial services – both at FFTC and in building a terrific team and business opportunity at E4E – is pure joy."

Wellman will continue to be active in the community, serving as the region's Honorary Consul of France and on the boards of Providence Day School, World Affairs Council of Charlotte and Opera Carolina.



Union County educator LaTrice Monique Towns was awarded a \$1,500 grant in October from the Union County Education Foundation, thanks to support from UCCF. The grant will support a project using LEGOs to engage students in science, technology, reading, engineering and math.

\$87,000 AWARDED WITH HELP FROM PLANNED GIFTS

The Union County Community Foundation, a regional affiliate of FFTC, recently awarded more than \$87,000 in grant funding to 20 organizations serving Union County, NC, residents.

The UCCF board advises several funds managed by Foundation For The Carolinas. Two of these funds were established with planned gifts that have created a legacy of annual giving for Union County.

One such fund, the Henry S. & Carolyn C. Adams Endowment Fund, was established in 1997 and fully funded with a planned gift in 2003. Each year, grants are awarded to nonprofits engaged in work aligned with the Adams' intent: professional development of teachers in Union County public schools, college scholarships and other charitable causes. This year, 13 organizations received grants from the Adams fund.

Among those grantees is the Union County Education Foundation, which received support for their Leadership and Innovation Funding for Teachers grant program. This annual program invites Union County public school teachers to apply for grants for innovative classroom projects. "The Union County Education Foundation is a young organization, and we couldn't grow without the help of the Union County Community Foundation," said Amy Sperry, executive director of the Union County Education Foundation.

Also created through a planned gift, the Clyde L. & Martha S. Richardson Memorial Fund helps mentally disadvantaged and physically handicapped Union County residents. The board awarded five grants from the Richardson fund this year, as well as two additional grants from its Community Endowment Fund.

For more information, visit www.unioncounty-cf.org.

SCCF RECEIVES CHALLENGE GRANT

The Stanly County Community Foundation, a regional affiliate of FFTC, has received a \$100,000 challenge grant. The money will be placed in a new fund named the CB Crook Community Fund, and the Stanly board will use it to make unrestricted grants to local nonprofits. The foundation's goal is to grow the fund to at least \$200,000.

"Our entire board is excited about this challenge gift," said SCCF Board President Marshall Rogers. "If successful, it will add \$200,000 to our foundation and will have a profound impact on our ability to make grants. At current rates, it will add about \$10,000 to our yearly grants. Not just one year – but from now on. That's the beauty of a foundation."

To donate, visit www.ffc.org/CrookCommunityFund.

FCJC'S LEGACY INITIATIVE SURPASSES \$25 MILLION IN PLANNED GIFTS

The Foundation for the Charlotte Jewish Community's Create Your Jewish Legacy program recently surpassed the \$25 million mark in legacy gifts. The planned giving initiative has received commitments from more than 350 local members and families with an average gift of nearly \$125,000.



"This is only the beginning of our collaborative effort to identify and understand a donor's passion for Judaism as we strive towards establishing a culture of philanthropy that will sustain our Jewish community for future generations," said Phil Warshauer, FCJC executive director.

Create Your Jewish Legacy is an initiative of FCJC, a subsidiary of FFTC, in partnership with 10 community partners. The goal is to build a strong, vibrant Jewish community, now and in the future with bequests for permanent endowments.

Established in 2012, Create Your Jewish Legacy is modeled after successful programs established in more than 30 cities. Endowment gifts through the CJL initiative can be used to underwrite vital programs for the Jewish community in greater Charlotte, Israel and around the world.

For more information or to establish your own legacy, visit www.charlottejewishlegacy.org.

LOCAL STUDENTS AWARDED CAROLINA PANTHERS SCHOLARSHIPS

The Carolina Panthers Scholarship Fund recently announced its 2016-2017 scholarship winners, who were selected based on their outstanding athletic participation, leadership and academic achievement.

The Carolina Panthers Players' Sam Mills Memorial Scholarship provides scholarships to rising college freshmen who are pursuing a four-year undergraduate degree. This year's recipients include:



▶ Kylie Fackrell (South Mecklenburg High School), studying Biology at UNC-Chapel Hill



▶ Melvin Howard (Olympic High School - School of Mathematics, Engineering, Technology and Science), studying Engineering at Lenoir-Rhyne University

The Carolinas Stadium Corporation Scholarship Fund provides scholarships to student-athletes who are pursuing graduate studies. This year's recipients include:



▶ Maggie Grisell, who graduated from Furman University and is studying Dental Medicine at Lake Erie College of Osteopathic Medicine



▶ Richard McNeill, who graduated from UNC Charlotte and is pursuing his Master in Business Education at UNCC

"The Carolina Panthers are proud to partner with Foundation For The Carolinas to support the education efforts of some of our region's best and brightest students," said Carolina Panthers Director of Community Relations Riley Fields. "The members of this year's scholarship class serve as outstanding examples of leadership and achievement. The team is pleased to be part of their ongoing successes."

FFTC currently manages nearly 150 scholarship programs. To learn how to create a scholarship fund, visit www.ffc.org/personal_philanthropicsolutions.

Our newsletter, *Philanthropy Focus*, is designed to inform and interest donors, clients and friends of the Foundation. The communications department welcomes your suggestions.

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Foundation For The Carolinas cares about the environment. This newsletter is printed with vegetable-based ink on paper manufactured from 10% post-consumer, recovered and mixed fiber from 100% certified sources.



Hospitality is Serious Business.

220 North Tryon at FFTC is uptown Charlotte's premiere venue for corporate retreats, seminars, receptions and board meetings. Our state-of-the-art facility includes 17 conference rooms, as well as an art gallery, sculpture garden and solarium overlooking expansive city views.

Book your company's next gathering at 220 North Tryon. Contact Marla Neely at 704.998.6410 or mneely@fftc.org.

Revenue generated from 220 North Tryon supports FFTC's work in our community, and allows us to offer free meeting space to our region's nonprofits during weekday business hours.

Visit www.fftc.org/events for more information.



at Foundation For The Carolinas

SAVE THE DATE: 2017 FFTC ANNUAL MEETING

Foundation For The Carolinas is excited to announce that the 2017 Annual Meeting will take place on **Tuesday, March 28**, from noon to 1:30 p.m. at the Charlotte Convention Center.

The Annual Meeting is one of our region's premier nonprofit events. Attendees learn about philanthropy and civic leadership, and hear from nationally acclaimed, thought-provoking speakers. The meeting convenes nearly 1,500 leaders each year from the corporate, nonprofit and civic sectors for a celebration of philanthropy in our region.

FFTC President and CEO Michael Marsicano will showcase our work to advance economic opportunity in our region, and will also highlight inspiring stories from our donors and community partners. The keynote speaker will be announced in the coming weeks.

Table sponsorships are now available, and individual seats will be available online in early 2017. Contact Susan Gray at sgray@fftc.org or 704.973.4588 to reserve your sponsorship.

**For more information visit
www.fftc.org/2017AnnualMeeting.**



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