

Foundation For The Carolinas  
Report to the Community  
2004 - 2005

the changing  
face  
of philanthropy



## GEOGRAPHIC AFFILIATES

**Cabarrus County (N.C.) Community Foundation**  
**Charlotte Mecklenburg (N.C.) Community Foundation**  
**Cherokee County (S.C.) Community Foundation**  
**Cleveland County (N.C.) Community Foundation**  
**Foundation for Richmond County (N.C.)**  
**Iredell County (N.C.) Community Foundation**  
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## SUPPORTING FOUNDATIONS

**The Crosland Foundation**  
**Foundation for the Arts & Sciences**  
**Foundation for the Charlotte Jewish Community**  
**Antonio & Zaydee Lopez-Ibanez Foundation**  
**North Carolina Blumenthal Performing Arts Center Foundation**  
**Salisbury Community Foundation, Inc.**  
**The James A. Turner Jr. Family Foundation**  
**United Way Legacy Foundation**



the changing  
**face**  
of philanthropy

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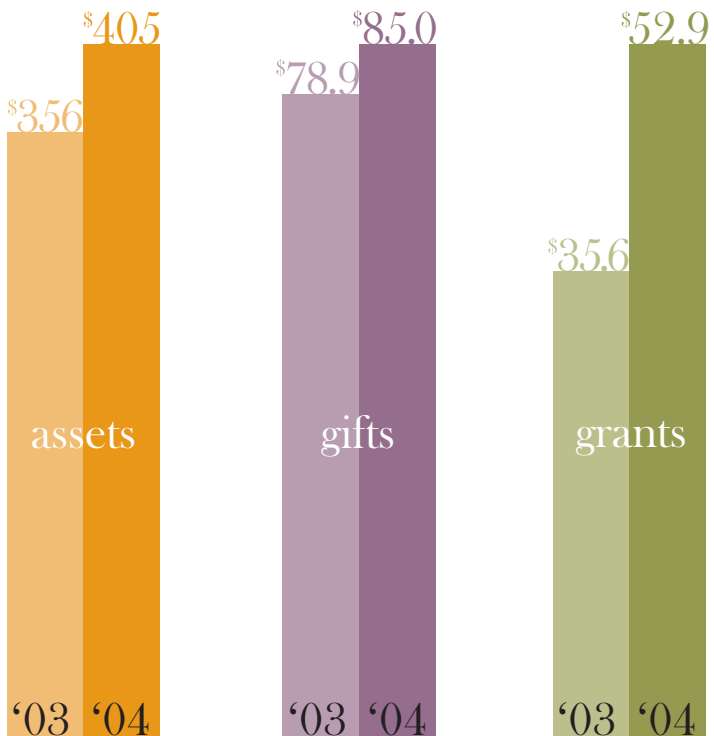
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# the chair and president's message

A series of natural disasters, from a devastating tsunami to a relentless hurricane season, brought charitable giving to the forefront of the American consciousness this year. People gave pennies, people gave millions, children sold lemonade and families opened their homes and hearts to those whose lives were upside down.

Different ages. Different means. Different races and religions and ethnicities. It's this same mix of people who have become today's philanthropists. New kinds of donors and new ways of giving are changing the face of philanthropy.

As the Foundation diversifies its client base, the bottom line is growing stronger. Assets grew 14%, from \$356 million in 2003 to \$405 million in 2004. A record \$85 million in gifts was contributed and grants to nonprofits increased 48% for a total of \$53 million. All of this was accomplished with annual operating expenses of \$3.3 million.



Comparative numbers are in millions

Our outstanding numbers, however, tell only part of the Foundation's story. Our work goes deeper than making grants. As a community catalyst, we lead civic initiatives, convene diverse constituents and connect individuals and nonprofits in order to address our region's greatest challenges. In 2004, the Foundation served as the catalyst for numerous projects including those focusing on children, inclusiveness and the environment.

From convening to client services, the Foundation continues to provide personalized service and expert management. With a newly-structured client services team in 2004, the Foundation created three Centers for Giving: the Center for Personal and Family Philanthropy, the Center for Nonprofits and the Center for Corporate Philanthropy.



Michael  
Marsicano  
*President  
and CEO,*  
Ruth G. Shaw  
*Chair of  
the Board*

Providing personalized service is a Foundation hallmark. It started 47 years ago with the Foundation's first president, Gordon Berg, who passed away July 2, 2005. It was his vision that made the Foundation a permanent community resource for charitable needs. Mr. Berg's legacy will live on through Foundation For The Carolinas.

The success of Foundation For The Carolinas is sustained by the generosity of our donors, the financial advisors who recommend us to them, and the dedication of our Foundation and county affiliate boards, volunteers and numerous nonprofits. In this report you will meet some of the new faces of philanthropy and discover how much generosity and goodwill exists in our region and the tremendous impact your donations are having on our communities.

Ruth G. Shaw, Chair of the Board

Michael Marsicano, President and CEO

# collective giving

At Foundation For The Carolinas' Center for Philanthropy, there is a new way of helping others through a collective approach known as "giving circles." Giving circles (also known as impact funds for the major impact that can be made from a group of donations versus individual ones) allow like-minded donors to pool their resources, research community needs and decide collectively where to donate funds. The Foundation's first giving circles, the Impact Fund for Emerging Philanthropists and the Women's Impact Fund, have successfully harnessed the power of pooled charitable giving to strengthen the lives of others. Three new collective giving groups recently have taken shape for small business owners, teens and entrepreneurs.

## SEED Charlotte

SEED Charlotte (Small Businesses and Entrepreneurs Enriching and Developing Charlotte) was launched in November 2004 in partnership with Foundation For The Carolinas' Center for Corporate Philanthropy and the *Charlotte Business Journal*. The program provides a hands-on



experience in philanthropy and volunteerism, as well as an outlet for owners to directly help improve the community where they conduct business. Phelps Sprinkle, president and CEO of Topics Education, learned the value of philanthropy from his parents. "My folks' philosophy was for those to whom much is given, much is expected," he said.

Phelps  
Sprinkle  
(center)  
chats with  
budding  
entrepreneurs  
Michael  
Warren and  
Shakina  
McCall,  
students in  
an education  
program  
funded by  
SEED  
Charlotte

The success of Sprinkle's small business has afforded him the opportunity to give back by participating in SEED Charlotte. "I wanted our company to connect with a worthy hands-on project where we could give not just money, but our time," Sprinkle said. In addition to donating money, the SEED businesses also volunteer at the nonprofit beneficiaries. "It's been a great way to engage our entire organization in philanthropy," Sprinkle said, "while making a meaningful contribution to our community."

### Teen Impact Fund

The Teen Impact Fund gives teenagers the power – and the money – to make a difference. The program is a collaborative effort between the



Teen Impact Fund members Charmeeka (left) and Charmeeya Grier and Jonathan Mauney

Foundation, Partners In Out-of-School Time and the Youth Leadership Institute. It gets teens involved in philanthropy through educational sessions, team-building activities and identifying community needs.

The ultimate goal of the Teen Impact Fund is to award a \$10,000 grant from the Charlotte Mecklenburg Community Foundation to programs working to solve challenges facing teens. "Giving away this much money is a huge responsibility," said Charmeeya Grier, a ninth grader at West Mecklenburg High School. "But we feel good knowing that it will make a big impact." Jonathan Mauney, a senior at Charlotte County Day School said the Teen Impact Fund experience is giving him a new perspective on

Will Miller

volunteerism. "I'm becoming familiar with our community – finding out what the real problems are, who's doing what to change things, and how we can help."

### Social Venture Partners

Social Venture Partners Charlotte enlists entrepreneurs who pool their charitable giving and provide grants and business expertise to local causes. Resembling a venture capital firm, the group creates relationships with nonprofits (i.e. investees), sets specific performance standards, provides ongoing strategic expertise, and works to develop plans for future funding.

Will Miller spent more than 20 years in the commercial real estate business in Charlotte. He is now using his business savvy to make a difference in the nonprofit sector as executive director of Social Venture Partners Charlotte. "Social Venture



Partners offers people with an entrepreneurial spirit an opportunity to be more engaged in giving," Miller said. "They want to contribute not just financial support, but volunteer hours and hands-on experience to effect social change. I'm not saying that we can save the world, but I'm confident that this program will make a difference in our community."



# planned • giving

The face of philanthropy is changing as more and more people think about supporting their favorite charities in perpetuity with a gift through a will or other planned giving option. It's a way of ensuring that donors will be remembered and that their good works will continue.

## Minnie McKee

Through a provision in her will, the late Minnie McKee's concern for the welfare of children continues to live on through an endowment to assist families and children served by **Charlotte's First Baptist Church – West**, where Mrs. McKee was a member. Mrs. McKee devoted herself not only to her religious institution, but also to education and the students she encountered during her 40 years as a teacher. Mrs. McKee and her husband, the late Jimmie McKee (a leading philanthropist, political activist, and owner of the Excelsior Club – a leading African American social club in the southeast) were well known for their philanthropic contributions. Mrs. McKee's endowment is a testament of her everlasting concern for those in her community.



Minnie McKee

## The Blumenthals

Ensnconed in the Blue Ridge Mountains surrounded by the kind of nature and solitude best described by a poet's pen, Wildacres serves as a retreat for those who "work for the betterment of human relations." The late I.D. Blumenthal purchased the property in 1936 and considered Wildacres a divine gift with which his family had been entrusted. Through a charitable bequest by his brother Herman Blumenthal, two endowments will secure the operation of the **Wildacres Retreat** and its programs for years to come. Wildacres, which is open to nonprofit organizations, has hosted numerous



Anita and Herman Blumenthal



groups and individuals from disciplines such as the arts, sciences, religion, academia, environment and medicine.

To honor the human relations focus of the Blumenthal family, the Wildacres Leadership Initiative was established in 1995. Its signature program is the William C. Friday Fellowship for Human Relations, a two-year leadership program that provides emerging North Carolina leaders core competencies of sound leadership.

# scholarships

The Foundation directly manages 25 scholarship programs and oversees the administration of 53 others. In 2004, more than \$2 million in scholarships supported 1,121 students.

## Laura M. Fleming Scholarship Fund

Founders Federal Credit Union in Lancaster, S.C. was like family to its



former president and CEO, Laura M. Fleming. That's why the children of the credit union's members are now eligible for scholarships in her memory. The **Laura M. Fleming Scholarship Fund**, established in 2004 through the Lancaster County Community Foundation, provides undergraduate scholarships to future leaders who possess the kind of

determination and enthusiasm shown by the scholarship's namesake. Fleming, who retired after dedicating 42 years of service to one of South Carolina's largest credit unions, left behind an extraordinary legacy when she passed away in 2003.

## Carolina Panthers Scholarship Endowment Fund

Kevin Saunders knew that the competition for a **Carolina Panthers** scholarship would be as fierce as the competition he faced on the football field during his undergraduate years at Davidson College. And though his athletic prowess helped secure the Panthers scholarship for him, it was Saunders' academic skills and community involvement that led him to Duke University where he currently is seeking a Ph.D. in molecular genetics and microbiology.

Saunders is proud of his achievements in football, but is now focused on becoming a research scientist. Established in 1995, the **Carolina Panthers Scholarship Endowment Fund** provides graduate level scholarships to athletes in North and South Carolina on the basis of leadership, citizenship and academic merit. Among



eligibility requirements, male athletes must letter in football. "This scholarship will help me focus on the overwhelming first year of graduate school without the added financial stress," Saunders said. "I will be solely dedicated to academics."

Laura M.  
Fleming

Kevin  
Saunders

# professional advisors

**Foundation For The Carolinas values its relationship with professional advisors and works with them to provide their clients with a variety of charitable giving options.**

When Henry and Daisy Bridges went to their attorney C. Michael Crisp of Grier Furr & Crisp with the idea of creating a special endowment, Crisp turned to the Foundation to make it work. "The Foundation provided the expertise and ensured that the wishes of the Bridges were fulfilled," Crisp said. The Bridges wanted an endowment for an annual environmental lecture series focusing on the sustainability and preservation of the planet. The lectures are held at different area churches each year.



Crisp feels confident referring clients to the Foundation. "I know their needs will be addressed and the charitable funds will be administered in an appropriate way," he said.

**The Foundation is pleased to work with more than 100 professional advisors.**

Charlotte attorney C. Michael Crisp (right) and Henry and Daisy Bridges

A.G. Edwards & Sons  
Afton Capital Management  
Allstate  
Anderson Associates  
BB&T  
BDO Seidman  
Bank of America  
Barnard, Combs, Potts & Rhyne  
Barry Evans Josephs & Snipes  
Baucom, Claytor, Benton, Morgan & Wood  
Bernard N. Ackerman, CPA, PA  
Bishop Capitano & Abner  
Bragg Financial Advisors  
Brinkley Walser  
Brown Brothers  
Harriman & Co.  
Buckhorn Capital Management  
Bullard, Blanchard, Johns  
Carnegie Capital Advisors  
Carolinas Investment Consulting  
Carroll Financial Associates

Linda V. Carter, CPA  
Caudle & Spears  
Charles Schwab  
Cherry Bekaert & Holland  
Clark, Griffin & McCollum  
Cline, Brandt, Kochenower & Co.  
Law Offices of Robert M. Critz  
Culp, Elliot & Carpenter  
Dellinger & Deese  
Deloitte & Touche  
Dixon Hughes  
Eastover Capital Management  
Edward D. Jones & Company  
Eisele, Ashburn, Greene & Chapman  
Elbert Consulting  
Elliot & Warren  
Jerome N. Epping, CPA  
Ernst & Young  
Essex Richards  
F & M Bank  
First Charter Bank

First Citizens Bank  
 First Financial Resources  
 First National Bank  
 Folks, Khoury & DeVenney  
 Grant Thornton  
 Greer & Walker  
 Grier Furr & Crisp, P. A.  
 Griffin, Smith, Caldwell,  
 Helder, & Helms  
 Gunst & Gunst  
 Guthrie, Davis, Henderson &  
 Staton  
 Hamilton Gaskins Fay & Moon  
 Harkey, Lambeth, Nystrom,  
 Florella & Morrison  
 Hartsell & Williams  
 Haselden, Owen & Boloyan  
 Helms Henderson &  
 Associates, P.A.  
 Helms Mulliss & Wicker  
 Hinrichs Financial Group  
 Hunter & Hunter  
 James McElroy & Diehl  
 Johnston, Allison & Hord  
 Jonas Law Firm  
 Jonathan Smith & Company  
 The Jones Blair Group  
 Jones, Deane & Williams  
 KPMG  
 KattenMuchinRosenman, LLP  
 Kennedy Covington  
 Lobdell & Hickman  
 Ketner & Associates  
 Kilpatrick Stockton  
 Kirk Palmer & Thigpen  
 Legg Mason Wood Walker  
 Lesesne & Connette  
 Love & Hutaff  
 Mayer, Brown, Rowe & Maw  
 McColl Brothers  
 McColl Garella  
 McGuireWoods  
 McNair Law Firm  
 Merrill Lynch  
 Miller McNeish Breedlove &  
 Hearn  
 Moore & Van Allen  
 The Morehead Group  
 Morgan Keegan  
 Morgan Stanley  
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 Morton Grigg & Phillips  
 Nancy Black Norelli  
 Northwestern Mutual Life  
 Novare Capital Management  
 Odum & Groves  
 Opus Financial Advisors, Inc.  
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 Parker Poe Adams & Bernstein  
 Parks, Pate & Scarborough  
 Plummer, Belo & Russell  
 Pope, McMillan, Kutteh,  
 Simon & Privette  
 Poyner & Spruill  
 PricewaterhouseCoopers  
 Prudential Securities  
 RSM McGladrey  
 Rinehart & Associates  
 Robbins May & Rich  
 Robinson, Bradshaw & Hinson  
 Ruff, Bond, Cobb,  
 Wade & Bethune  
 Saint-Armand, Thompson &  
 Mathis  
 Sellers Henshaw  
 Sherrill & Smith, CPA  
 Shuford, Caddell & Fraley  
 Shumaker, Loop & Kendrick  
 Smith Barney  
 Sterling Capital Management  
 SunTrust  
 Thompson & Davis  
 Turlington & Company  
 UBS Financial Services  
 U.S. Trust Company  
 Uwharrie Capital Corporation  
 Wachovia  
 Williams, Boger, Grady,  
 Davis & Tuttle  
 Wishart, Norris,  
 Henninger & Pittman  
 Womble Carlyle  
 Sandridge & Rice  
 Yelton, Farfour, McCartney,  
 Lutz & Craig  
 Jodi P. Zbinden,  
 Attorney At Law

# foundation affiliates

Foundation For The Carolinas is privileged to partner with engaged individuals, families, nonprofits and corporations across the region. The following list includes the Foundation's geographic affiliates, all of which strive to improve the quality of life in specific communities, as well as our supporting foundations (noted with an \*), popular with donors who find the administrative burdens of a private foundation prohibitive. Many of our geographic affiliates make competitive grants, which are listed on pages 18 through 24.

## Cabarrus County (N.C.) Community Foundation

(est. 1989)  
27 Charitable Gift Funds • 1 New in 2004  
Competitive Grants: 10 totaling \$20,250  
Total grantmaking including the Foundation's  
donor recommended grants: \$853,494

### Board of Trustees

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Mark E. Shelley, P.C.

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Hartzell and Williams, PA

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Graphic Techniques South

**Quincy Foil**  
The Arts Experience

**Kenneth B. Geathers**  
Bill Hefner Veterans Hospital

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Civic Leader

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Moose Pharmacy

**Mark Nantz**  
Northeast Medical Center

**Irvin Newberry**  
Newberry, Cathey & Co.

**Tony C. Scott**  
Growth & Success, Inc.

**Edward B. Tyson**  
Retired, Superintendent of  
Cabarrus County Schools

**William "Hamp" H. West**  
West Atlantic Transportation

## Charlotte Mecklenburg (N.C.) Community Foundation

(est. 2001)  
957 Charitable Gift Funds • 91 New in 2004  
Competitive Grants totaling \$1,604,889  
Total grantmaking including the Foundation's  
donor recommended grants: \$21 million

### Board of Trustees

**Sallie M. Lowrance**, *Chair*  
Civic Leader

**Jill S. Flynn**, *Secretary*  
The Flynn Heath Leadership

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Charlotte-Mecklenburg Police Department

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Civic Leader

**Amy Rice Blumenthal**  
ALRY Publications

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Lee Institute

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Bank of America

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**Marcia W. Simon**  
Paul Simon for Women

**Michael A. Watkins**  
Wachovia Corporation

**James H. Woodward, Ph.D.**  
Chancellor Emeritus, UNC Charlotte

### Trustees Emeriti

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Retired, Southern Webbing Mills

**W. R. Cuthbertson Jr.**  
Retired, BB&T

**Edwin L. Jones Jr.**  
Retired, J.A. Jones Construction Co.

## Cherokee County (S.C.) Community Foundation

(est. 1994)

7 Charitable Gift Funds • 3 New in 2004  
Competitive Grants: 3 totaling \$7,000  
Total grantmaking including the Foundation's  
donor recommended grants: \$34,147

### Board of Trustees

**John B. Travers**, *Chair*

*Retired, The Timken Company*

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*Cline, Brandt, Kochenower & Co., P.A.*

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*James M. Cudd, C.P.A.*

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*First Piedmont Federal*

**V. Stephen Moss**

*First National Bank of the Carolinas*

**Gloria G. Rosemond**

*Retired, Realtor*

## Cleveland County (N.C.) Community Foundation

(est. 1985)

22 Charitable Gift Funds • 1 new in 2004  
Competitive Grants: 3 totaling \$8,112  
Total grantmaking including the Foundation's  
donor recommended grants: \$233,766

### Board of Trustees

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*McDonald's*

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*Civic Leader*

## The Cole Foundation

(est. 1965)

In 2004, The Cole Foundation made 20 grants totaling \$822,583 from its competitive grantmaking program. It also awarded \$136,435 in scholarships. The Cole Foundation serves a broad range of charitable, educational, religious, literary and cultural purposes benefiting primarily the citizens of Richmond County.

### Board of Directors

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*Jones, Deane & Williams*

**Robin L. Hinson**

*Robinson, Bradshaw & Hinson*

## The Crosland Foundation\*

(est. 2003)

The Crosland Foundation, created by John Crosland Jr. and family as a supporting foundation, seeks to help children with learning disabilities, provide housing for the less fortunate and support urban policy research and education.

**John Crosland Jr.**

*Crosland, Inc.*

**Judith E. Crosland**

*Civic Leader*

**Molly Crosland Cashion**

*Civic Leader*

**John Crosland III**

*Crosland, Inc.*

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*Foundation For The Carolinas*

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*Curis Inc., COB*

**Donaldson G. Williams**

*Capital Advisors of North Carolina*

**James H. Woodward, Ph.D.**

*Chancellor Emeritus, UNC Charlotte*

## Foundation for the Arts & Sciences\*

(est. 2002)

### 49 Charitable Gift Funds

The Foundation for the Arts & Sciences was created by the Arts & Science Council of Charlotte-Mecklenburg. This partnership benefits the Arts & Science Council, its related cultural organizations and the citizens of our community by ensuring the stability of financial resources and ongoing support for generations to come.

### Board of Trustees

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**Van Weatherspoon**  
*The Weatherspoon Group*

**Cassandra Harris Tydings, J.D., LL.M.**  
*Vice President of Planned Giving*

## Foundation for the Charlotte Jewish Community\*

(est. 1997)

### 72 Charitable Gift Funds • 9 New in 2004

The Foundation for the Charlotte Jewish Community represents the major institutions that comprise the organized Jewish community in Charlotte: Charlotte Jewish Day School, Congregation Ohr Ha Torah (Lubavitch of North Carolina), The Foundation of Shalom Park, The Hebrew Cemetery, The Jewish Community Center, Jewish Family Services, The Jewish Federation of Greater Charlotte, Sandra and Leon Levine Jewish Community Center, Temple Beth El and Temple Israel. The Foundation is dedicated to furthering the quality of Jewish religion, life and culture in the greater Charlotte area.

### Board of Directors

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*Lerner & Co. Real Estate*

**Leon Levine**  
*Retired, Family Dollar*

**Abraham Luski**  
*Shamrock Management*

**Michael Marsicano, Ph.D.**  
*Foundation For The Carolinas*

**Carter Meiselman**  
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**Richard J. Osborne**  
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**Jill Newman**  
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**Marc H. Silverman**  
*MHS Holdings*

**Robert Speizman**  
*Speizman Industries*

**Howard Wollner**  
*LarsonAllen*

**Sue Worrel**  
*Executive Director*

## Foundation For Richmond County (N.C.)

(est. 1993)

### 9 Charitable Gift Funds

Donor recommended grants: \$6,280

### Board of Trustees

**John S. Stevenson, M.D.**, *Chair*  
*Charlotte Radiology*

**James C. McCaskill**, *Vice Chair*  
*USDA Rural Development*

**Masoud Ahdieh, M.D.**  
*Masoud Ahdieh, M.D., P.A.*

**Maggie K. Beard**  
*Civic Leader*

**Russell E. Bennett Jr.**  
*Retired, Russell Bennett Chevrolet*

**J. Neal Cadieu Jr.**  
*Retired, Richmond County Daily Journal*

**W. Larry Clay**  
*Dixon Hughes, PLLC*

**J. Cohen Cox**  
*Cox & Hamilton, CPA*

**Genevra B. Kelly**  
*Genevra B. Kelly Company, LLC*

**Yvonne R. Loury**  
*United Way of Richmond County*

**Eugene B. McLaurin II**  
*Total Fine Elf Lubricants USA, Inc.*

**M. Steven Morris**  
*Helms Jewelers, Inc.*

**W. Jesse Spencer**  
*W. Jesse Spencer, CPA*

## Iredell County (N.C.) Community Foundation

(est. 1989)

### 21 Charitable Gift Funds

Competitive Grants: 9 totaling \$37,000

Total grantmaking including the Foundation's donor recommended grants: \$462,752

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## Lancaster County (S.C.) Community Foundation

(est. 1988)

### 11 Charitable Gift Funds • 1 New in 2004

Competitive Grants: 5 totaling \$13,150

Total grantmaking including the Foundation's donor recommended grants: \$30,796

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## Lexington Area (N.C.) Community Foundation

(est. 1996)

### 11 Charitable Gift Funds

Competitive Grants: 1 totaling \$1,000

Total grantmaking including the Foundation's donor recommended grants: \$145,877

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## Lincoln County (N.C.) Community Foundation

(est. 2001)

### 5 Charitable Gift Funds • 1 New in 2004

Competitive Grants: 5 totaling \$3,000

Total grantmaking including the Foundation's donor recommended grants: \$32,060

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## Antonio & Zaydee Lopez-Ibanez Foundation\*

(est. 2000)

The Antonio & Zaydee Lopez-Ibanez Foundation was established to continue the Lopez-Ibanez family's long-time support of Catholic charities and arts and children's organizations.

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## North Carolina Blumenthal Performing Arts Center Foundation\*

(est. 2003)

In 2003, the North Carolina Blumenthal Performing Arts Center transferred the administration of its endowment to Foundation For The Carolinas.

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## Salisbury Community (N.C.) Foundation, Inc.\*

(est. 1944)

85 Charitable Gift Funds • 2 New in 2004  
Competitive Grants: 1 totaling \$50,000  
Total grantmaking including the Foundation's  
donor recommended grants: \$6,811,885

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**Stanly County (N.C.)  
Community Foundation**  
(est. 1999)

**11 Charitable Gift Funds**

**Competitive Grants: 5 totaling \$14,925**

**Total grantmaking including the Foundation's  
donor recommended grants: \$154,201**

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**The James A. Turner Jr.  
Family Foundation\***  
(est. 1999)

The James A. Turner Jr. Family Foundation is a supporting organization established to carry out the broad charitable purposes of the Turner Family. The Foundation focuses its grantmaking in many areas, including the environment and education.

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**Union County (N.C.)  
Community Foundation**  
(est. 1989)

**30 Charitable Gift Funds • 1 New in 2004**

**Competitive Grants: 2 totaling \$2,205**

**Total grantmaking including the Foundation's  
donor recommended grants: \$157,929**

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**United Way  
Legacy Foundation\***  
(est. 2001)

**8 Charitable Funds**

The United Way Legacy Foundation was established to provide a continuing source of funding for United Way of Central Carolinas, Inc.

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**York County (S.C.)  
Community Foundation**  
(est. 1988)

**31 Charitable Gift Funds • 4 New in 2004**

**Competitive Grants: 3 totaling \$11,565**

**Total grantmaking including the Foundation's donor recommended grants: \$254,963**

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# competitive grants

The Foundation's family of funds awarded more than \$2.9 million in competitive grants to numerous nonprofits throughout the region.

## Cabarrus County Community Foundation

Total Grants \$20,250

**\$3,000 to the Academic Learning Center** to purchase reading enrichment books for 350 elementary students

**\$3,000 to the Cabarrus Arts Council** to fund a presentation by Khac Chi, a duo of musicians who play music on instruments native to Vietnam, at middle schools in Cabarrus County

**\$1,000 to the Cabarrus Arts Experience** to provide financial assistance to youth participating in the after-school and summer cultural arts programs

**\$1,500 to the Cabarrus County Partnership for Children** to produce a short video in Spanish illustrating and emphasizing critically important safeguards for infants and young children

**\$750 to Communities in Schools of Cabarrus County** for a ceremony for six 12th graders who will graduate in spite of many challenges that could have led to their dropping out of school

**\$2,000 to Habitat for Humanity of Cabarrus County** to replace and upgrade computer hardware and software

**\$2,000 to New Piney Grove Community Outreach Center** to set up a GED/computer lab to help dislocated workers obtain their GEDs and acquire job seeking skills

**\$2,000 to Prosperity Ministries** for operating support

**\$2,500 to Prosperity Unlimited** for services to the Hispanic population on the mortgage loan and closing processes

**\$2,500 to United Family Services - Cabarrus County** for teen anger management groups that will focus on working through conflict and healthier communication

## Mariam Coltrane Schramm Benevolence Fund \$110,000 Administered by the Cabarrus County Community Foundation

**\$20,000 to the American Red Cross** to provide assistance for victims and families affected by events such as natural disasters, single family fires and aviation crashes

**\$20,000 to Cabarrus Meals on Wheels** to provide meals to the frail, elderly and disabled in Cabarrus County

**\$5,000 to the Community Free Clinic** to assist with basic human needs

**\$20,000 to the Cooperative Christian Ministry** to meet the emergency needs of unemployed and underemployed individuals in the community

**\$5,000 to the Hispanic Learning Center** to assist with basic human needs

**\$20,000 to the Junior Charity League of Concord** to purchase clothing for needy children

**\$20,000 to The Salvation Army** to provide financial assistance to those in need

## Charlotte Mecklenburg Community Foundation

Total Grants \$1,604,889

The Foundation has identified three key focus areas for its grantmaking: **Children and Youth, Environment and Social Capital**

### Children and Youth \$648,738

Reinforces programs that serve school-age children and youth

**\$40,000 to Above and Beyond Students** to support a year-round, daily program for children in grades 3 - 5 in the Enderly Park neighborhood with a focus on bringing students to grade level for academic achievement



It's a question Charlotte's professional community has been eager to answer: Who will replace the city's most experienced leaders when they retire? The City Committee, an action-based group of emerging Charlotte leaders, is working on a solution. In 2004 the group developed an initiative to figure out ways to attract and

retain professionals who invent, create and innovate. A grant from the Charlotte Mecklenburg Community Foundation provided funding for the **Hot Jobs/Cool Communities Report** that documented and evaluated Charlotte's assets and its approach to attracting and retaining the 25- to 44-year-old workforce.

**\$5,000 to Allegro Foundation** to support the More at Four program, which provides weekly movement education classes for children with learning disabilities or cancer

**\$8,474 to The Arc of Mecklenburg County** to provide peer support and information to families of children who have been diagnosed with a special need or born prematurely

**\$4,000 to the Carolina Raptor Center** for its Feathered Fables program to teach preschool and kindergarten children about raptors

**\$10,000 to Central Avenue Bilingual Preschool** for its Preschool and Parent Education programs serving at-risk children under 5 years, low-income families and non-English speaking families

**\$3,986 to Charlotte Communities of Shalom** for the Thomasboro Youth Researcher's Project to conduct a needs assessment of youth in the neighborhood to identify personal skills, capabilities, talents and strengths

**\$10,000 to Charlotte Communities of Shalom** to support the Thomasboro Youth Council, consisting of 25 middle and high school students, to share in local government matters and learn skills of leadership and responsibility that benefit the community

**\$10,000 to Charlotte Emergency Housing** to provide childcare for up to 12 children, ages birth through 5 years, and before- and after-school care through age 12, for the children of the residents living at the shelter

**\$37,500 to the Children & Family Service Center** to support the collaborative efforts of the nine organizations working together in this Center, including the development of a community child watch advocacy initiative

**\$4,000 to Girl Scouts, Hornets' Nest Council** to engage young women in solving problems, making wise decisions and contributing to their communities in innovative ways

**\$10,000 to Girls On The Run of Charlotte** to provide scholarships for 155 Charlotte area girls to attend this program which teaches self-respect, healthy lifestyle choices and prevention of risky behavior

**\$10,000 to Hispanic Cultural Center of Charlotte** for its Academic Currency Project, which provides college tutorials and workshops to Latino youth and their parents

**\$10,000 to Johnson C. Smith University** to support the Saturday Academy, which provides on-site mentoring and tutoring for at-risk students in grades 3 and 5 from two underperforming Charlotte Mecklenburg schools

**\$15,000 to the Latin American Coalition** to provide an after-school mentoring program to help elementary students, ages 6 - 12, adapt to their new culture

**\$5,704 to Learning Labs' Computer Recycling Program**, which collects donated computers and distributes them to families in inner city housing communities

**\$5,000 to the Lee Institute** to fund a strategic planning retreat for The Children's Alliance, a collaborative effort of numerous organizations committed to the well-being of children and families in Mecklenburg County

**\$50,000 to the Lee Institute** to support the United Agenda for Children initiative, with the goal of ensuring that all children in Mecklenburg County are healthy, safe and well-educated

**\$7,000 to The Light Factory** to support the Media Literacy Leadership Conference, which provides youth leaders an opportunity to discuss issues of race, gender and class, and to learn how to deconstruct media images and messages

**\$3,970 to The Light Factory** to support a multi-disciplinary art exploration through photography and images, storytelling and visual art for young men who are coming of age and need assistance in understanding their role in society

**\$65,000 to the Mecklenburg Medical Alliance Endowment** for its Reach Out and Read literacy program, to provide books and educational materials for 15,000 children and their parents

**\$10,000 to the National Conference for Community and Justice** to support a five-day youth leadership and diversity program for 40 high school students

**\$141,343 to Partners in Out-of-School Time (POST)**, a collaborative effort to increase the quantity and quality of out-of-school time programming, to provide technical assistance and training for providers and to increase public awareness of out-of-school time issues

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“When women walk through the door, they are just a friend – not a label or stereotype,” said Beverly Grant (third from left), founder of **Friends of Beverly**. Grant's group was the recipient of a Front Porch grant from the Charlotte Mecklenburg Community Foundation. The Friends of Beverly grant is managed by Crisis Assistance Ministry. Front Porch grants are awarded to organizations that are building relationships between different races, ethnicities, genders, ages,



religions and neighborhoods. The monthly gatherings of Friends of Beverly builds relationships by “proving that professional women can be supportive of each other and that a life filled with diversity is a richer tapestry,” Grant said.

**\$5,000 to Partners in Out-of-School Time (POST)** for the Lights On Afterschool Community Breakfast featuring guest speaker Dr. Deborah Prothrow-Stith presenting strategies for the prevention of youth violence and gangs

**\$10,000 to Prevent Blindness North Carolina** to provide photo-refractive vision screening to 675 preschoolers

**\$30,000 to Right Moves For Youth** to support the expansion of clubs for students in 4th through 8th grades in fragile and threatened neighborhoods

**\$4,000 to Seigle Avenue Presbyterian Church** for the service/learning project of the youth department's 2003-2004 program

**\$10,000 to Seigle Avenue Preschool Cooperative** to provide curriculum and materials for the classrooms, and professional development for teachers and staff of the Charlotte Preschool Partnership

**\$10,000 to Summit House of Charlotte** to provide financial and professional support to pregnant women and mothers who have been convicted of nonviolent offenses, to help them successfully reintegrate into society

**\$15,000 to Urban League of Central Carolinas, Inc.** to expand its Make A Difference Centers for at-risk youth and families in low-income communities by offering after-school and summer camps to displaced children

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A **\$54,523** grant from the George D. Patterson Fund will make possible a spay and neuter media campaign. The grant was awarded to **Charlotte-Mecklenburg Animal Control** in cooperation with the **Humane Society of Charlotte** and will teach pet owners how spaying and neutering can effectively and humanely end the pet population crisis.



The George D. Patterson Family Fund was established in 2001 in honor of George Patterson and his daughter, Sally, who both shared a deep love for animals. Today, the Patterson family's legacy continues through the fund which provides significant support to agencies focused on animal welfare.

**\$3,761 to YMCA - Lake Norman Branch** for the Youth Engaged in Leadership and Learning (YELL) program, which helps youth explore their relationship to, and position in, the community in which they live

**\$15,000 to YWCA of Central Carolinas** to support its Literacy Initiative, which offers a seamless continuum of literacy services to at-risk children in the child development center and out-of-school programs

**\$40,000 to YWCA of Central Carolinas** to continue support of three Support Our Schools (SOS) sites in at-risk communities in the Charlotte area

**\$40,000 to Zion Center for Worship and the Arts** to establish a year-round dance program for 5- to 14-year-old low-income youth and immigrants in the Briar Creek/Central Avenue area

## Environment \$190,513

**Addresses issues concerning the environment and quality of life in Mecklenburg County and 13 surrounding counties in North and South Carolina**

**\$25,000 to Catawba Lands Conservancy** for its Open Space Protection Program, which enables the Conservancy and five other land conservation organizations to expand the rate and efficiency of land protection in our region by providing financial and estate planning expertise to landowners and their advisors

**\$38,500 to the Lee Institute** to conduct focus groups and feasibility studies with environmental leaders and agencies in the community

**\$5,000 to the Lee Institute** to explore the creation of a network of environmental agencies to foster increased collaboration and conversation throughout the region

**\$117,257 to Voices & Choices** to fund the State of the Region Report and the Catawba Regional Trail project

**\$4,756 to Warren Wilson College** to promote a statewide dialogue of the challenges presented in the *Horizon 2100* report created by nine of the state's leading conservation scientists

## Social Capital \$478,138

**Focuses on addressing the growing racial, cultural and economic diversity of the region**

**\$5,000 to Afro-American Cultural Center** to sponsor the Carolina Circuit Writers, a program aimed at increasing our understanding of the role and value of the arts, especially literature, as an essential stimulant in our lives

**\$5,000 to the Better Business Bureau Consumer Foundation** for the Alto Al Farude (Stop the Fraud) event, which focuses on information and educational tools to protect Latino consumers from fraudulent and unethical marketplace activities

**\$15,000 to Charlotte Advocates for Education** to develop a Parent Leadership Institute to encourage a higher level of parent involvement in public schools

**\$5,000 to Community Building Initiative** to host a symposium for the Front Porch grants program to explore ways to build bridges between people of different backgrounds

**\$95,333 to Community Building Initiative** to help Charlotte-Mecklenburg become a racially and ethnically inclusive and equitable community

**\$200,000 to Community Building Initiative** for its Crossroads Charlotte program, which engages the community through storytelling and focuses on a productive approach to the community's future in terms of access, equity, inclusion and trust for all citizens

**\$19,885 to Foundation of the University of North Carolina at Charlotte, Inc.** to host the Institute for Social Capital Colloquium Series, bringing speakers to Charlotte for community dialogue around the issues of social capital, children's well-being, data sharing, university-community partnerships, interdisciplinary research and community accountability

**\$37,920 to International House of Metrolina** to create a Middle Eastern Council for the Charlotte-Mecklenburg area to facilitate greater trust and understanding among members of the Middle Eastern community and with the community at large

**\$50,000 to Lee Institute** to support the United Agenda for Children initiative, with the goal of ensuring that all children in Mecklenburg County are healthy, safe and well-educated

**\$5,000 to Queens University** for its 4th Annual Southern Summit, which brings together 200 individuals from all walks of life for a day-long discussion to build a greater sense of shared community for our rapidly growing and diverse region

**\$40,000 to YMCA of Greater Charlotte** to support the University City Community Building Project's Leadership Academy and Leadership Summit program, with the goal of developing leadership, infrastructure and social capital to strengthen the area's sense of community

### **Opportunity Fund \$102,500** Provides support for special opportunities in Mecklenburg County

**\$15,000 to Advantage Carolina Foundation** to support the City Committee in researching the increasingly competitive market to attract and retain the next generation of talented and educated professionals

**\$10,000 to Charlotte Emergency Housing** to explore the feasibility of developing family supportive housing in Charlotte-Mecklenburg

**\$15,000 to Charlotte Woman of the Year Fund** to create a woman's leadership program that will nurture young women to serve as Charlotte's future leaders

**\$1,000 to Community Link** to support the Employer Partnership Pilot Project designed to increase awareness and mobilize efforts in the business community to enable the working poor to be more successful and self-sufficient

**\$25,000 to Justice Initiatives, Inc.** to establish a non-profit dedicated to funding justice-related initiatives in the 26th Judicial District

**\$11,500 to MedAssist of Mecklenburg** to support the Mecklenburg Pharmacy Partnership in creating a freestanding, centrally located pharmacy that can be used by clients of free clinics, Physician Reach Out and organized homeless health programs

**\$25,000 to the University of North Carolina's Center for International Understanding** for its Latino Initiative, which provides North Carolina leaders with resources and information to successfully integrate immigrants into the community

### **Specialized Grants \$185,000** Addresses a wide range of needs throughout the region

**\$40,000 to the Impact Funds** to support the Teen and Emerging Philanthropists programs

**\$10,000 to United Way of Central Carolinas, Inc.** to support the 2004 Health & Human Services Institute

**\$10,000 to Foundation For The Carolinas' Employee Matching Gifts Program** to encourage its employees to make charitable gifts to nonprofits of their choice

**\$85,000 to Foundation For The Carolinas** to advance community philanthropy

**\$40,000 to Regional HIV/AIDS Consortium** for continued operational support

### **Cherokee County Community Foundation** Total Grants \$7,000

**\$2,000 to the Cherokee County Literacy Association** to purchase computer hardware and software to teach adults how to read

**\$2,000 to the Institute at Biltmore** for a study of Cherokee County's social infrastructure as it relates to individual needs, and the opportunities for forging partnerships and strengthening public support for human needs

**\$3,000 to Limestone College** to create a customized Web site to promote planned giving

Every day more than 13,400 York County children are at risk for hunger. Research shows that many families find it difficult to make healthy food choices on limited incomes. To combat this



crisis, **Second Harvest Food Bank of Metrolina** teamed up with various York County Boys & Girls Clubs to provide nutritious meals and snacks to children during the week through its Kids Café program. A \$6,000 grant from the York County Community Foundation expanded the program to the weekends. An estimated 600 children between the ages of 5 and 15 now take home backpacks over the weekend, filled with food and educational materials about nutrition. The backpack program ensures proper nutrition every day.

## Cleveland County Community Foundation

Total Grants \$8,112

**\$10,000 to the Broad River Greenway** for trail restoration due to heavy rains and flooding from Hurricane Frances

**\$2,500 to the Cleveland County Abuse Prevention Council** to provide outreach services for men in the homeless shelter

**\$1,950 to Habitat for Humanity of Cleveland County** to expand the part-time coordinator's position

## The Cole Foundation

Total Grants \$822,583

**\$150,000 to Arts Richmond/Richmond County Arts Council** for renovation of the existing Arts Richmond Center

**\$5,000 to the Boy Scouts of America - Central NC Council** for a two-week survival challenge in Cimarron, New Mexico

**\$25,000 to the Boys & Girls Clubs of the Sandhills** for an after-school tutoring program in Richmond County

**\$30,000 to Environmental Impact** to develop a watershed restoration road map for the cleanup of the Hitchcock Creek Watershed

**\$30,000 to Friendship Trays** to subsidize meals for the homebound

**\$60,500 to the Humane Society of Richmond County** to build exercise areas and new kennels at the facility

**\$40,000 to the Leak Street Alumni** to renovate the bathrooms at the Leak Street Educational and Cultural Center

**\$50,100 to Mineral Springs School** to complete the Barry Ridley Memorial Learning Garden

**\$125,000 to the Richmond Community College Foundation** to build the Grimsley Health Sciences Building

**\$46,000 to the Richmond County Community Support Center** for its Indigent Prescription Drug Program, which provides counseling and serves as an information and referral source to residents

**\$9,567 to the Richmond County Council on Aging** to purchase non-perishable home-delivered meals to clients outside the current service area

**\$17,266 to the Richmond County Historical Society** to research and write a book chronicling the history of Richmond County from 1900 to 2000

**\$50,000 to Richmond County Hospice** to support construction of a residential hospice facility and new administrative center

**\$50,000 to Richmond County Schools** to purchase science kits for all Richmond County students grades K-8

**\$23,000 to Richmond County Schools** to construct a new playground at Washington Street School

**\$8,500 to Rockingham Downtown Corp.** to update the sound system in the Richmond Community Theatre

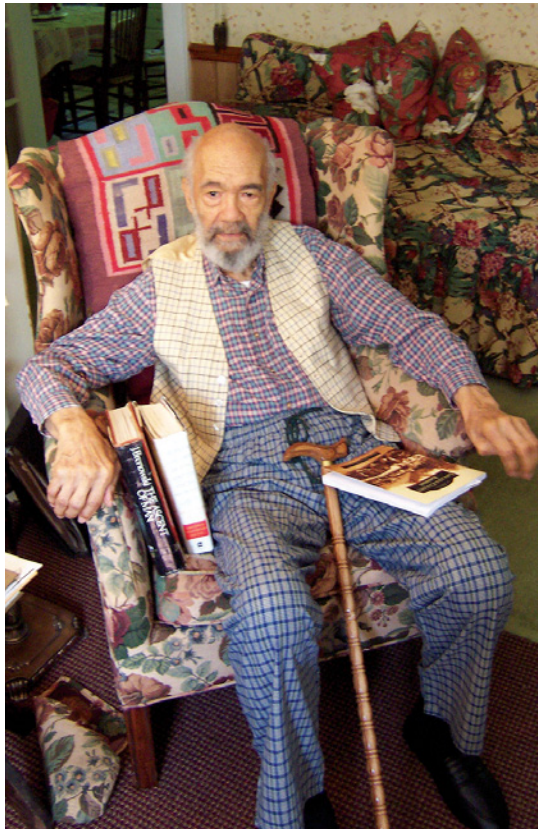
**\$25,000 to the Rockingham Housing Authority** to provide art classes designed to prepare students interested in pursuing art in college

**\$8,000 to Rockingham Junior High School** for the annual Fine Arts Festival

**\$15,650 to the United Way of Richmond County** to examine methods for improving access to existing services in the public and private sectors for county residents

**\$54,000 to Womenfolk Unlimited** to provide shelter and services for victims who are escaping domestic violence

Important voices were at risk of being lost or never discovered until the **Lincoln County Historical Association** created the Lincoln County Voices Project. The goal of Voices is to document and preserve the history and heritage of Lincoln County's African American community. Historical Association staff members are collecting personal histories and cataloging documents, photographs, artifacts and other related objects. A grant from the Lincoln County Community Foundation funded the purchase of audio equipment needed to conduct interviews with residents such as Leonard Holloway (pictured). The collected personal histories highlight the contributions of African Americans to the arts, culture, businesses and demographic makeup of Lincoln County.





## Foundation For Richmond County

No competitive grants awarded in 2004

## Foundation For The Carolinas' Regional Grants

Total Grants \$313,726

**Encourages regional solutions to challenges that cross geographic and political boundaries**

### African American Community Foundation \$20,000

**Supports the efforts that promote economic self-reliance, equal opportunity, leadership skills and cultural awareness among the region's African American community**

**\$10,000 to Advantage Learning Center** for its Camp Bright Star summer camp that focuses on math, science and character education for children ages 5-12. Funds will be used to bring children from A Child's Place who are homeless or at a high risk of being homeless

**\$10,000 to Seigle Avenue Partners** to integrate the Children's Defense Fund Freedom School curriculum into Seigle Avenue's existing out-of-school time program

### Building Regional Capacity \$87,500

**Supports new and innovative projects for a broad range of charitable purposes**

**\$15,000 to the Charlotte Housing Authority Scholarship Fund** for a feasibility study regarding an endowment campaign

**\$5,000 to Cherokee County Community Foundation** for its operating fund

**\$15,000 to Echo Foundation** to bring six Nobel Laureates in the sciences to Charlotte for three days of intense dialogue and interaction with students, teachers, school administrators, scientists, professionals, community leaders and the general public

**\$25,000 to Elon Homes for Children** for programs aimed at enhancing mental health and for after-school programming

**\$15,000 to the NC Center for Nonprofits** for general support

**\$12,500 to NPower** for operating support

### Children's Medical Fund \$33,143

**Provides assistance – including medication, supplies, equipment, surgical procedures and special treatment – to children from families with limited income**

**\$24,143 to Community Health Services** to offset medical expenses incurred by children with critical medical needs

**\$5,000 to Community Health Services** for administering the Children's Medical program

**\$4,000 to LensCrafters Vision Van** to provide eye exams and glasses to students from Charlotte-Mecklenburg schools

### Medical Research \$65,891

**Provides seed funds to initiate promising new medical research projects**

**\$65,891 to Carolinas Medical Center, East Carolina University, UNC-Chapel Hill, UNC-Chapel Hill – Lineberger Comprehensive Cancer Center and UNC-Charlotte** for medical research

### Kate B. Reynolds Medication Assistance Program \$107,192

**Helps pay for prescription medications for low-income individuals who are not covered by Medicaid or insurance**

**\$14,274 to Community Care Clinic** in Rowan County

**\$5,774 to Community Care Clinic** in Stanly County

**\$9,274 to Community Free Clinic** in Cabarrus County



From its headwaters high in the Blue Ridge Mountains, the Broad River first trickles, then cascades, and finally roars down the mountainside. During Hurricane Frances in 2004, that comforting roar turned into a deafening bellow as heavy rains and flooding caused extensive damage to the **Broad River Greenway** trails. Downed trees, deep ruts and impassable areas have prevented the public from having safe access to the 1,500-acre preserve. A grant from the Cleveland County Community Foundation is helping to restore the greenway so it can continue to reward visitors with glimpses of osprey and spotted sandpipers and engage them with landscape portraits painted by wildflowers, mountain laurel and wild azalea.

**\$9,774 to Department of Health** in Cleveland County

**\$8,274 to Department of Social Services** in Mecklenburg County

**\$9,774 to Diakonos (5th St. Ministries)** in Iredell County

**\$9,274 to HealthQuest** in Union County

**\$40,774 to MedAssist of Mecklenburg** in Mecklenburg County

## Iredell County Community Foundation

Total Grants \$20,000

**\$5,000 to Appropriate Punishment Options** to provide competency-based life skills workshops to youth ages 12-19, who have exited or are in danger of exiting the educational system

**\$5,000 to the Iredell County Partnership for Young Children** to fund a Resource Development Director to work with groups seeking grants for programs in the community

**\$2,000 to LifeSpan** for a computer learning center in Troutman for adults with developmental disabilities

**\$2,000 to Mitchell Community College** to provide personal development and education to minority male students to help improve academic success

**\$2,000 to the Mooresville-South Iredell Health Assistance Clinic** to provide funding for the Resource Development Director to research grant opportunities for the organization

**\$2,000 to Teen Health** to provide funding for the Resource Development Director to research grant opportunities for the organization

**\$2,000 to The Jemsek Project** to provide services to people living with HIV/AIDS who have no medical insurance and who do not qualify for medical assistance

## Lancaster County Community Foundation

Total Grants \$13,150

**\$2,000 to The Diabetes Education Center** to educate students at Clinton Elementary School about diabetes and the role nutrition and exercise play in preventing diabetes

**\$4,202 to Eastside Academy** to build a walking track to promote healthier lifestyles, provide a safe haven for exercise and add to the beauty and surroundings of the campus

**\$2,650 to the Lancaster County Council of the Arts** to provide instruction in pottery making for students ages 12-18 in an alternative school program

**\$1,495 to Lancaster County Schools** for an Outdoor Wilderness Adventure at Eastside Academy for students in grades 6 through 9 who have completed the program

**\$2,803 to the Palmetto Citizens Against Sexual Assault** to implement a system to videotape and record forensic interviews of children who have been victimized in order to prevent children from being interviewed by numerous agencies

## Lexington Area Community Foundation

Total Grants \$1,000

**\$1,000 to the Davidson County Community College** to support its 40th Anniversary Celebration

## Lincoln County Community Foundation

Total Grants \$3,000

**\$700 to the American Red Cross** to prepare students, their families and schools for disasters and other emergencies

**\$500 to East Lincoln Christian Ministry** to provide holiday meals for families in need

**\$800 to the Lincoln County Coalition Against Child Abuse** for a program that helps children and educators better understand the underlying issues that contribute to child abuse and neglect

**\$500 to the Lincoln County Historical Association** to document and preserve the history and heritage of the African American community in Lincoln County

**\$500 to the Lincoln Cultural Development Center** to provide school-age children an opportunity to attend performances and observe African works of art by local African American artists

## Salisbury Community Foundation, Inc.

Total Grants \$50,000

**\$50,000 to Rowan County YMCA/Salisbury Branch** to assist with construction of a full-service facility

## Stanly County Community Foundation

Total Grants \$14,925

**\$2,000 to the Badin Historic Museum** to restore and preserve a 1915 quadruplex unit

**\$2,925 to Friends of the Senior Center** to provide services, training and support to caregivers of those with dementia

**\$4,000 to Stanly Community Christian Ministry** to purchase needed medications for households where sickness has interrupted their lifestyles

**\$2,000 to the Stanly County Partnership for Children** to provide parent education and support to expecting parents and parents with children birth up to age 3

**\$4,000 to Stanly Memorial Hospital** to provide children, who are victims of physical or sexual abuse, and their families quicker access to medical examinations, treatment and counseling

## Union County Community Foundation

Total Grants \$2,205

**\$1,400 to the American Red Cross, Union County Chapter** to educate citizens in the community who are caring for a person at home

**\$805 to the Union County Community Shelter** to install a shower in the shelter's lobby restroom

## York County Community Foundation

Total Grants \$11,565

**\$3,065 to the Anne Springs Close Greenway** to develop new historical and environmental exhibits at Graham Cabin to help families and school children better understand early life in York County

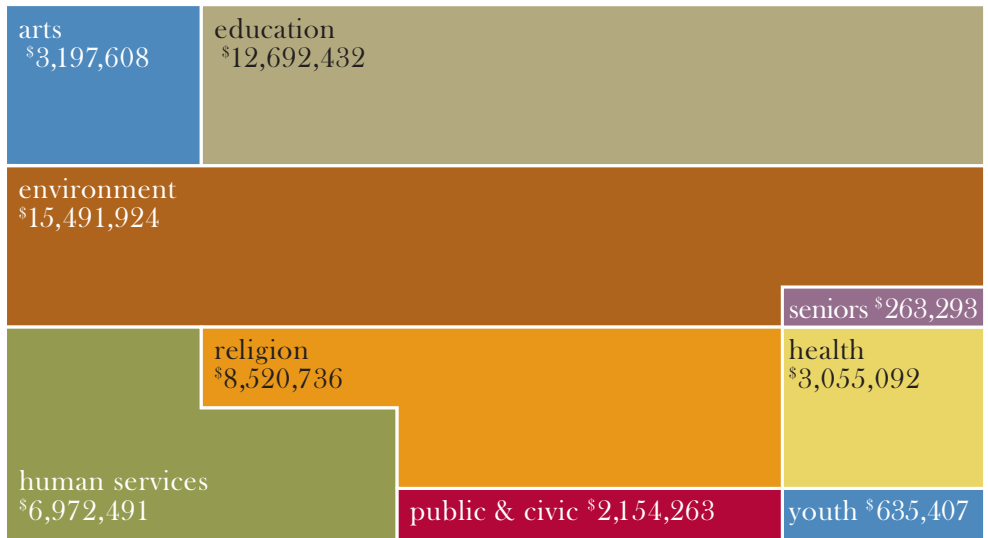
**\$2,500 to the Clover Area Assistance Center** to purchase medicines for those in need in the community

**\$6,000 to the Second Harvest Food Bank of Metrolina** to provide nutritious food during the weekends for children who are at risk for hunger

# all grant distributions

# total \$52,983,246

This listing includes all grants recommended by Foundation donors and clients to benefit nonprofits in the Charlotte region and throughout the United States. In addition, the list includes competitive grants awarded through the Foundation's numerous affiliates.



Grant figures are cumulative and may represent numerous grants.

## arts \$3,197,608

Afro-American Cultural Center, Charlotte, NC	\$13,999
Arts & Science Council, Charlotte, NC	1,385,308
Arts Richmond/Richmond County Arts Council, Rockingham, NC	150,000
Atlanta Opera Association, Atlanta, GA	135,000
Brevard Music Center, Brevard, NC	20,750
Cabarrus Arts Council, Concord, NC	26,250
Carolinas Concert Association, Charlotte, NC	10,500
Charlotte Repertory Theatre, Charlotte, NC	18,793
Charlotte Symphony Orchestra, Charlotte, NC	153,680
Children's Theatre of Charlotte, Charlotte, NC	345,263
Community School of the Arts, Charlotte, NC	35,946
Foundation for the Arts & Sciences, Charlotte, NC	78,166
Foundation For The Arts & Sciences Operating Fund, Charlotte, NC	23,500
High Museum of Art, Atlanta, GA	20,000
McColl Center for Visual Art, Charlotte, NC	34,800
Mint Museum of Art, Charlotte, NC	174,575

NC Dance Theatre, Charlotte, NC	134,624
North Carolina Blumenthal Performing Arts Center, Charlotte, NC	47,021
Opera Carolina, Charlotte, NC	35,701
Penland School of Crafts, Penland, NC	65,350
Piedmont Players Theatre, Salisbury, NC	37,000
Queen's Table Restricted Fund, Charlotte, NC	32,000
Salisbury-Rowan Symphony Society, Salisbury, NC	26,950
Waterworks Visual Arts Center, Salisbury, NC	41,200
Zion Center for Worship and the Arts, Charlotte NC	40,000
Others (56 less than \$10,000 each)	\$111,232

## education \$12,692,432

Above and Beyond Students, Charlotte, NC	\$40,000
Adventist Christian Academy, Charlotte, NC	16,195
Appalachian State University, Boone, NC	28,350
Asheville School, Asheville, NC	40,500
Ashley Hall Foundation, Charleston, SC	100,000
Belmont Abbey College, Belmont, NC	19,250
Berean Junior Academy, Charlotte, NC	11,422
Brevard College, Brevard, NC	2,100,255

education (continued)

Brookstone Schools of Mecklenburg County, Charlotte, NC	20,100	Gainesville City Schools, Gainseville, GA	10,000
Brown University, Providence, RI	10,000	Garr Christian School, Charlotte, NC	26,738
The California Institute of Technology, Pasadena, CA	300,000	Georgia Tech Foundation, Atlanta, GA	22,100
Campbell University, Buies Creek, NC	14,500	Gordon-Conwell Theological Seminary, South Hamilton, MA	34,500
Canterbury School, Greensboro, NC	15,000	Greensboro Day School, Greensboro, NC	15,000
Catawba College, Salisbury, NC	597,390	Hampden-Sydney College, Hampden-Sydney, VA	151,750
Central Avenue Bilingual Preschool, Charlotte, NC	61,695	Healthy Children of Rowan County, Inc., Salisbury, NC	22,750
Central Piedmont Community College, Charlotte, NC	27,129	Hickory Grove Baptist Christian School, Charlotte, NC	33,162
Central Piedmont Community College Foundation, Charlotte, NC	24,386	Highlands Community Child Development Center, Highlands, NC	10,000
Chapel of Christ The King Weekday School Inc., Charlotte, NC	27,700	Hiram College, Hiram, OH	100,000
Character Builders Christian Academy, Charlotte, NC	10,295	Hood Theological Seminary, Salisbury, NC	316,000
Charlotte Advocates for Education, Charlotte, NC	15,500	Johnson C. Smith University, Charlotte, NC	13,800
Charlotte Children's Scholarship Fund, Charlotte, NC	36,250	Kings Academy, Florence, SC	10,500
Charlotte Christian School, Charlotte, NC	28,040	LSU Foundation, Baton Rouge, LA	12,000
Charlotte Country Day School, Charlotte, NC	243,837	La Grange College, La Grange, GA	50,000
Charlotte Housing Authority Scholarship Fund, Charlotte, NC	24,553	Lee Institute, Charlotte, NC	301,500
Charlotte Islamic School, Inc., Charlotte, NC	16,875	Levine Museum of the New South, Charlotte, NC	134,800
Charlotte Latin School, Charlotte, NC	90,250	Lexington Educational Association - Project Potential, Lexington, NC	13,500
Charlotte Mecklenburg Schools, Charlotte, NC	51,032	Lineberger Comprehensive Cancer Center, Chapel Hill, NC	16,243
Chatham Hall, Chatham Hall, VA	12,250	Linville Foundation, Linville, NC	98,150
Classroom Central, Charlotte, NC	26,844	Livingstone College, Salisbury, NC	40,800
Clemson University, Clemson, SC	50,100	Mars Hill College, Mars Hill, NC	40,500
Clemson University IPTAY Club, Clemson, SC	51,600	McCallie School, Chattanooga, TN	55,900
Converse College, Spartanburg, SC	332,389	NC A&T State University, Greensboro, NC	26,500
Crossnore School, Crossnore, NC	27,700	NC Central University, Durham, NC	11,250
Culture and Heritage Foundation, Inc., Rock Hill, SC	10,250	NC High School Athletic Association, Chapel Hill, NC	12,000
Dallas Theological Seminary, Dallas, TX	18,000	NC State University, Raleigh, NC	28,800
Davidson College, Davidson, NC	473,400	NC State University-Financial Aid, Raleigh, NC	86,425
Dental Foundation of North Carolina, Inc., Chapel Hill, NC	99,741	NC State University Foundation, Raleigh, NC	23,500
Discovery Place, Charlotte, NC	75,373	Nations Ford Christian Academy, Charlotte, NC	12,930
Duke University, Durham, NC	652,235	New Life Christian Academy, Charlotte, NC	22,982
East Carolina University, Greenville, NC	42,715	North Carolina Outward Bound, Asheville, NC	11,000
East Carolina University Foundation, Greenville, NC	15,222	Northside Christian Academy, Charlotte, NC	47,337
Educational Foundation, Chapel Hill, NC	36,500	NPower Charlotte Region, Inc., Charlotte, NC	159,452
Emory University, Atlanta, GA	137,500	Paw Creek Christian Academy, Charlotte, NC	14,550
Episcopal High School, Alexandria, VA	45,615	Peace College, Raleigh, NC	14,000
Evelyn Mack Academy Inc., Charlotte, NC	21,075	The Pegasus School, Huntington Beach, CA	250,000
First Assembly Christian School, Concord, NC	10,590	Pfeiffer University, Misenheimer, NC	45,500
Fletcher School, Charlotte, NC	66,810	Porter-Gaud School, Charleston, SC	22,000
Foundation of the University of North Carolina, Charlotte, NC	53,885	Presbyterian College, Clinton, SC	22,500
Fuller Theological Seminary, Pasedena, CA	13,000	Providence Day School, Charlotte, NC	28,338
Fuqua School of Business, Durham, NC	10,000	Public Library of Charlotte & Mecklenburg County, Charlotte, NC	26,500
Furman University, Greenville, SC	11,250	Queens University of Charlotte, Charlotte, NC	248,340
		Randolph Macon Women's College, Lynchburg, VA	204,250

education (continued)

Resurrection Christian School, Charlotte, NC	53,264
Rhodes College, Memphis, TN	15,000
Richmond Community College Foundation, Hamlet, NC	126,000
Richmond County Schools, Hamlet, NC	123,100
St. Anne's-Belfield School, Charlottesville, VA	11,000
Salem Academy & College, Winston-Salem, NC	29,750
Salem College, Winston-Salem, NC	11,000
Salisbury High School, Salisbury, NC	316,602
Savannah College of Art & Design, Savannah, GA	25,000
Southern Methodist University, Dallas, TX	10,000
Stanly Community College Foundation, Albemarle, NC	11,320
Texas A&M University-Kingsville Foundation, Kingsville, TX	20,000
Trinity Episcopal School, Charlotte, NC	34,198
UNC-Chapel Hill, Chapel Hill, NC	376,539
UNC-Charlotte, Charlotte, NC	159,730
UNC-Charlotte Athletic Foundation, Charlotte, NC	40,246
UNC-Greensboro, Greensboro, NC	29,150
UNC-Pembroke, Pembroke, NC	28,400
UNC-School of Law Foundation, Inc., Chapel Hill, NC	26,000
UNC-Wilmington, Wilmington, NC	19,720
Union Theological Seminary & Presbyterian School, Charlotte, NC	176,600
Union Theological Seminary & Presbyterian School, Richmond, VA	26,500
United Negro College Fund, Charlotte, NC	10,000
University City Preparatory Academy, Charlotte, NC	38,502
University of Massachusetts at Lowell Alumni, Lowell, MA	10,000
University of South Carolina, Columbia, SC	37,600
University of Virginia, Charlottesville, VA	14,250
Victory Christian Center School, Charlotte, NC	93,993
Virginia Episcopal School, Lynchburg, VA	35,712
WFAE - University Radio Foundation, Charlotte, NC	11,565
WTVI, Charlotte, NC	42,715
Wake Forest University, Winston-Salem, NC	133,790
Warren Wilson College, Asheville, NC	40,756
Washington & Lee University, Lexington, VA	31,950
West Charlotte High School, Charlotte, NC	12,064
Western Carolina University, Cullowhee, NC	17,250
Wingate University, Wingate, NC	10,200
Winston-Salem State University, Winston-Salem, NC	39,900
Winthrop University, Rock Hill, SC	12,900
Winthrop University Foundation, Rock Hill, SC	11,800
Woodberry Forest School, Woodberry Forest, VA	31,488
Woodward Academy, College Park, GA	25,000
Others (509 less than \$10,000)	\$1,209,607

# environment

## \$15,491,924

American Chestnut Foundation, Bennington, VT	\$200,250
American Forests, Washington, DC	50,250
Appalachian Voices, Boone, NC	135,000
Audubon South Carolina, Harleyville, SC	10,000
Blue Ridge Environmental Defense League, Glendale Springs, NC	50,000
Canary Coalition, Sylva, NC	15,000
Carolina Raptor Center, Charlotte, NC	11,350
Catawba Lands Conservancy, Charlotte, NC	62,500
Charlotte Museum of History, Inc., Charlotte, NC	168,877
Clean Water for North Carolina, Asheville, NC	40,000
Conservation Council of North Carolina Foundation, Raleigh, NC	25,000
Conservation Fund, Arlington, VA	2,050,000
Conservation International Foundation, Washington, DC	10,000
Conservation Trust for North Carolina, Raleigh, NC	2,719,000
Daniel Jonathan Stowe Conservancy, Belmont, NC	77,000
Dogwood Alliance, Asheville, NC	77,000
Ducks Unlimited, Memphis, TN	41,000
Earth Island Institute, Pasadena, CA	10,000
EarthJustice Legal Defense Fund, Oakland, CA	100,250
Environmental Defense, Raleigh, NC	26,500
Environmental Impact, Aberdeen, NC	30,000
Environmental Support Center, Inc., Washington, DC	10,000
Friends of Great Smoky Mountains National Park, Waynesville, NC	25,000
Friends of the Earth, Washington, DC	100,000
GreenBlue Institute, Charlottesville, VA	10,000
Hebrew Cemetery Association, Charlotte, NC	10,491
Historic Salisbury Foundation, Salisbury, NC	17,769
The LandTrust for Central North Carolina, Salisbury, NC	1,360,900
League of Conservation Voters Education Fund, Washington, DC	200,000
National Audubon Society, Chapel Hill, NC	96,000
National Committee for the New River, West Jefferson, NC	10,000
National Forest Protection Alliance, Charlottesville, VA	45,000
Natural Resources Defense Council, New York, NY	100,000
NC Coastal Federation, Newport, NC	151,250
NC Coastal Land Trust, Wilmington, NC	91,000
NC Conservation Network, Raleigh, NC	32,500
NC Environmental Defense Fund, Raleigh, NC	355,000
NC Nature Conservancy, Durham, NC	171,250
NC Outward Bound School, Asheville, NC	24,370

environment (continued)

NC Waste Awareness & Reduction Network, Durham, NC	15,000
North Carolina Transportation Museum Foundation, Spencer, NC	10,200
North Carolina Waterfowl Association, Greenville, NC	32,500
Partners for Parks, Charlotte, NC	105,000
Population Action International, Washington, DC	25,000
Richmond County Historical Society, Rockingham, NC	17,266
RiverLink, Asheville, NC	100,000
Rowan County Parks & Recreation Dept., Salisbury, NC	251,000
Sierra Club Foundation, San Francisco, CA	344,000
South Carolina Coastal Conservation League, Charleston, SC	10,000
Southern Alliance for Clean Energy, Asheville, NC	20,000
Southern Appalachian Forest Coalition, Asheville, NC	101,000
Southern Appalachian Biodiversity Project, Asheville, NC	81,250
Southern Appalachian Highlands Conservancy, Asheville, NC	1,868,250
Southern Environmental Law Center, Chapel Hill, NC	3,041,500
Southern Environmental Law Center, Charlottesville, VA	35,000
Southwings, Asheville, NC	45,000
Sustainable North Carolina, Raleigh, NC	12,000
UNC-Charlotte, Charlotte, NC	10,000
Union of Concerned Scientists, Cambridge, MA	50,000
Voices and Choices, Charlotte, NC	119,007
Western North Carolina Alliance, Asheville, NC	125,000
Western North Carolina Development Association, Inc., Asheville, NC	10,000
Wild South, Moulton, AL	65,000
Wilderness Society, Atlanta, GA	50,000
World Stewardship Institute, Santa Rosa, CA	12,000
York County Culture & Heritage Commission, Rock Hill, SC	30,000
Others (93 less than \$10,000)	\$187,444

health  
\$3,055,092

ALS Association - Jim Catfish Hunter Chapter, Raleigh, NC	\$11,000
ALS Therapy Development Foundation, Cambridge, MA	10,000
American Cancer Society - Mecklenburg Unit, Charlotte, NC	74,738
American Red Cross, Central NC Chapter, Henderson, NC	12,000
American Red Cross, Charlotte, NC	10,650
American Red Cross, Concord, NC	21,250
American Red Cross, Reidsville, NC	17,660

American Red Cross, Salisbury, NC	86,403
Brain Tumor Fund for the Carolinas, Charlotte, NC	12,100
Carolinas Healthcare Foundation, Charlotte, NC	252,289
Carolinas Medical Center, Charlotte, NC	10,000
Close To A Cure, A Fund For Parkinson's Research, Charlotte, NC	18,520
Community Care Clinic of Rowan County, Salisbury, NC	87,492
Community Free Clinic, Concord, NC	14,824
Community Health Services, Charlotte, NC	58,133
Diakonos (5th St. Ministries), Statesville, NC	14,024
Dowd YMCA, Charlotte, NC	14,340
Drug Policy Alliance, New York, NY	20,000
Duke Comprehensive Cancer Center, Durham, NC	48,200
Duke University Children's Hospital, Durham, NC	20,000
Duke University Medical Center, Durham, NC	152,500
Greater Cleveland County Baptist Association, Shelby, NC	42,248
Health Sciences Foundation of M.U.S.C., Charleston, SC	125,036
Heineman Medical Research Center, Charlotte, NC	18,250
Hornet's Nest MS Fund, Charlotte, NC	10,000
Hospice & Palliative Care Charlotte Region, Charlotte, NC	20,800
Hospice of Cleveland County, Shelby, NC	10,282
Hospice of Iredell County, Statesville, NC	18,500
Jeff Gordon Foundation, Harrisburg, NC	25,000
Juvenile Diabetes Research Foundation International, Charlotte, NC	15,515
Lance Armstrong Foundation, Austin, TX	20,000
Lineberger Cancer Research Center, Chapel Hill, NC	10,300
Marrow Foundation - Hendrick Program, Charlotte, NC	102,500
Mecklenburg Medical Alliance Endowment, Charlotte, NC	65,000
MedAssist of Mecklenburg, Charlotte, NC	53,774
Medical Foundation of North Carolina, Chapel Hill, NC	10,500
Mental Health Association in North Carolina, Raleigh, NC	18,245
Mission St. Joseph's Healthcare Foundation, Inc., Asheville, NC	10,500
Northeast Medical Center Foundation, Inc., Concord, NC	10,417
Parkinson's Association, Charlotte, NC	27,057
Presbyterian Hospital Foundation, Charlotte, NC	48,213
Regional HIV/AIDS Consortium, Charlotte, NC	44,750
Robert Packard Center for ALS Research at Johns Hopkins, Baltimore, MD	10,000
Rowan Regional Medical Center Foundation, Salisbury, NC	1,134,601
Others (40 less than \$10,000)	\$251,821

# human services

## \$6,972,491

A Child's Place, Charlotte, NC	11,500	Graham County Department of Social Services, Robbinsville, NC	12,634
Alexander Youth Network, Charlotte, NC	18,323	Greensboro Urban Ministry, Greensboro, NC	103,340
Anderson Interfaith Ministries Inc., Anderson, SC	17,449	Habitat for Humanity of Charlotte, Charlotte, NC	41,680
Atlanta Union Mission, Atlanta, GA	20,000	Harnett County Department of Social Services, Lillington, NC	10,662
Baptist Children's Home of North Carolina, Thomasville, NC	76,800	Harvest Kitchen, Charlotte, NC	78,108
Blue Ridge Opportunity Commission, Inc., North Wilkesboro, NC	18,065	Helping Hands of Georgetown, Georgetown, SC	10,000
Boys & Girls Club of Cabarrus County, Concord, NC	27,000	The Hunger Project, New York, NY	71,500
Burke United Christian Ministries, Morganton, NC	13,265	Inter-Faith Council for Social Services, Carrboro, NC	27,778
Cabarrus Cooperative Christian Ministry, Concord, NC	105,899	Interfaith Assistance Ministry, Inc., Hendersonville, NC	71,703
Cabarrus Meals On Wheels, Concord, NC	20,250	International House, Charlotte, NC	39,022
Caldwell County Yokefellow, Inc., Lenoir, NC	14,988	J. F. Hurley Family YMCA, Salisbury, NC	11,000
Cannon Memorial YMCA, Kannapolis, NC	22,500	J. Smith Young YMCA, Lexington, NC	11,000
Catholic Social Ministries, Raleigh, NC	11,000	Jackson County Department of Social Services, Sylva, NC	16,795
Charlotte Lesbian and Gay Fund, Charlotte, NC	10,000	Jacob's Ladder Job Center, Charlotte, NC	22,000
Charlotte Emergency Housing, Charlotte, NC	28,250	Joshua's, Inc., Charlotte, NC	10,500
Charlotte Pregnancy Care, Charlotte, NC	11,260	Junior Charity League of Concord, Concord, NC	25,000
Charlotte Rescue Mission, Charlotte, NC	17,778	Kinder-Mourn, Charlotte, NC	10,100
Children and Family Services Center, Charlotte, NC	221,432	Lakewood Preschool Corporation, Charlotte, NC	53,787
Children and Family Services Center Fund, Charlotte, NC	385,054	Latin American Coalition, Charlotte, NC	20,000
Choanoke Area Development Association, Rich Square, NC	14,279	Leak Street Alumni, Rockingham, NC	40,000
Christian Crisis Center, Inc., Taylorsville, NC	15,324	Love INC of Mecklenburg County, Charlotte, NC	15,510
Clemson Community Care Inc., Clemson, SC	10,325	MDC, Chapel Hill, NC	15,000
Community Food Rescue, Charlotte, NC	22,700	Macon County Care Network, Franklin, NC	21,464
Cooperative Christian Ministries - Rockingham, Eden, NC	11,271	Martin County Department of Social Services, Williamston, NC	14,994
Council For Children, Charlotte, NC	157,937	Matthews Help Center, Matthews, NC	11,655
Crisis Assistance Ministry, Charlotte, NC	310,905	Maxwell M. Corpening Jr. Memorial Foundation, Marion, NC	19,749
Crisis Assistance Ministry of Greater Gastonia, Gastonia, NC	31,072	Mooreville Area Christian Mission, Mooreville, NC	19,522
Crisis Control Ministry, Winston-Salem, NC	180,245	NC Center for Non-profit Organizations, Raleigh, NC	15,250
Durham County Social Services, Durham, NC	78,607	National Conference for Community and Justice, Charlotte, NC	13,750
Eastern Catawba Cooperative Christian Ministry, Newton, NC	14,316	100 Black Men of Greater Charlotte, Charlotte, NC	15,000
Echo Foundation, Charlotte, NC	89,500	Open Door Ministries of High Point, Inc., High Point, NC	11,388
Elon Homes for Children, Elon, NC	47,072	Opportunity International, Inc., Oak Brook, IL	10,000
Family Center, Charlotte, NC	44,850	Our Towns of Lake Norman	16,000
Family Services of Davidson County, Lexington, NC	26,750	Habitat for Humanity, Davidson, NC	
Feed the Children, Oklahoma City, OK	32,400	Planned Parenthood Golden Gate, San Francisco, CA	30,000
Foundation For The Carolinas, Charlotte, NC	13,520	Planned Parenthood Health Systems - Charlotte, Charlotte, NC	68,445
Georgetown County United Way, Georgetown, SC	25,000	Population Communications International, New York, NY	100,000
Golden Strip Emergency Relief & Resources Agency, Simpsonville, SC	14,772	Population Connection, Washington, DC	11,000
Good Fellows Club, Charlotte, NC	11,750	Prevent Blindness North Carolina, Raleigh, NC	10,000

human services (continued)

Recording For The Blind & Dyslexic - Virginia, Charlottesville, VA	14,000
Richmond County Community Support Center, Rockingham, NC	46,000
Rockingham Housing Authority, Rockingham, NC	25,000
Rowan Helping Ministries, Salisbury, NC	124,472
St. Peter's Homes/McCreesh Place, Charlotte, NC	10,000
The Salvation Army, Charlotte, NC	61,980
The Salvation Army, Concord, NC	24,900
The Salvation Army, Gastonia, NC	11,662
The Salvation Army, Henderson, NC	10,230
The Salvation Army - Hickory, Hickory, NC	16,703
The Salvation Army - Mount Airy, Mt. Airy, NC	12,547
The Salvation Army - Reidsville, Reidsville, NC	20,454
The Salvation Army, Salisbury, NC	28,039
The Salvation Army - Winston-Salem, Winston-Salem, NC	20,299
Second Harvest Food Bank of Metrolina, Charlotte, NC,	14,000
Seigle Avenue Preschool Cooperative, Charlotte, NC	54,796
Society of St. Andrew, Durham, NC	100,000
South Caldwell Christian Ministries, Granite Falls, NC	10,392
Sunbelt Human Advancement Resources, Inc., Greenville, SC	25,850
Swain County Department of Social Services, Bryson City, NC	14,726
Thermal Belt Outreach Ministry, Columbus, NC	10,432
Thompson Children's Home, Charlotte, NC	129,637
Tri-County Christian Crisis Ministry, Inc., Elkin, NC	22,267
Union County Crisis Assistance Ministry, Monroe, NC	15,244
United Way of Alamance County, Burlington, NC	39,565
United Way of Central Carolinas, Charlotte, NC	850,198
United Way of Iredell-Statesville, Statesville, NC	22,375
United Way of Richmond County, Rockingham, NC	15,650
United Way of Rowan County, Salisbury, NC	62,720
United Way of Santa Fe County, Santa Fe, NM	10,000
United Way Services of Cleveland, Cleveland, OH	25,000
Urban League of Central Carolinas, Charlotte, NC	19,000
Waccamaw Community Foundation, Myrtle Beach, SC	11,323
Wachovia Corporation, Charlotte, NC	196,846
Wachovia Relief Fund, Winston-Salem, NC	268,785
Womenfolk Unlimited, Rockingham, NC	54,000
Word of Faith Ministries, Kenansville, NC	11,329
World Vision, Federal Way, WA	12,500

YMCA Blue Ridge Assembly, Black Mountain, NC	17,925
YMCA Harris Branch, Charlotte, NC	10,000
YMCA of Greater Charlotte, Charlotte, NC	88,872
YMCA of Rowan County, Salisbury, NC	110,100
YWCA of the Central Carolinas, Charlotte, NC	72,063
Yokefellow Service Center, Spindale, NC	37,744
Youth Homes, Inc., Charlotte, NC	43,000
Others (297 less than \$10,000)	\$846,782

public & civic  
\$2,154,263

Advantage Carolina Foundation, Charlotte, NC	47,500
Americans United for Separation of Church & State, Washington, DC	40,000
Beta Theta Pi Foundation, Oxford, OH	20,000
Carolina Rowing Foundation, Charlotte, NC	10,000
Center for Immigration Studies, Washington, DC	80,000
Center for Reproductive Law & Policy, New York, NY	75,000
Charlotte Communities of Shalom, Charlotte, NC	10,000
Charlotte Regional Sports Commission, Charlotte, NC	20,250
Charlotte-Mecklenburg Police Department, Charlotte, NC	63,000
City of Rock Hill, Rock Hill, SC	13,000
Community Building Initiative, Charlotte, NC	106,333
Community Foundations of America, Louisville, KY	75,000
The Community Foundation of Davie County, Mocksville, NC	10,282
Charlotte-Mecklenburg Crime Stoppers, Charlotte, NC	21,754
Cumberland County Animal Haven, Fayetteville, NC	110,838
The Emily Krzyewski Family LIFE Center, Durham, NC	25,000
Federation for American Immigration Reform, Washington, DC	150,000
Foundation For The Carolinas - Building Fund, Charlotte, NC	39,525
Housing Opportunity Foundation, Charlotte, NC	65,750
Humane Society of Richmond County, Rockingham, NC	60,500
Justice Initiatives, Inc., Charlotte, NC	25,000
League of Conservation Voters Education Fund, Washington, DC	50,000
The Lynnwood Foundation, Charlotte, NC	71,748
MPP Foundation, Washington, DC	60,000
NC Center for International Understanding, Raleigh, NC	28,800
New Life Mobility Assistance Dogs, Moravian Falls, NC	10,000
Numbers USA.Com, Arlington, VA	200,000
O. L. Miller Orthopedic Clinic, Charlotte, NC	60,250



public & civic (continued)

Park Square Advocates, Boston, MA	10,000
Population Media Center, Shelburne, VT	100,000
Salisbury Community Development Corp., Salisbury, NC	13,646
Seigle Avenue Partners, Charlotte, NC	15,000
Smith Barney Charitable Trust, Inc., New York, NY	124,132
U.S., Petoskey, MI	40,000
United Jewish Appeal Federation of Jewish Philanthropy, New York, NY	16,000
United Jewish Communities, New York, NY	15,000
William J. Clinton Presidential Foundation, Little Rock, AR	40,965
The Women's Impact Fund, Charlotte, NC	26,150
YMCA of Greater Charlotte, Charlotte, NC	40,000
Others (134 less than \$10,000)	\$163,840

religion  
\$8,520,736

2XSalt, Inc., Charlotte, NC	11,500
African Leadership, Franklin, TN	20,000
Ascension Lutheran Church, Charlotte, NC	15,000
Avondale Presbyterian Church, Charlotte, NC	25,000
Barnabas Center, Charlotte, NC	19,300
Bethel Presbyterian Church, Cornelius, NC	21,796
Bethlehem Presbyterian Church, Monroe, NC	12,500
Billy Graham Evangelistic Association, Charlotte, NC	1,014,815
Break Thru Ministries, Inc., Charlotte, NC	18,000
Campus Crusade for Christ International, Orlando, FL	53,050
Carmel Baptist Church, Matthews, NC	15,000
Carolina Sports Outreach, Charlotte, NC	22,250
Carolina Youth Commission, Charlotte, NC	21,317
Caswell County Parish, Inc., Yanceyville, NC	13,253
The Cathedral of All Souls, Asheville, NC	19,951
Cathedral of St. Phillip, Atlanta, GA	12,000
Celo Monthly Meeting of Friends, Burnsville, NC	13,775
Central Church of God, Charlotte, NC	25,700
Central United Methodist Church, Concord, NC	16,000
Central United Methodist Church, Shelby, NC	56,385
Chamber Music At St. Peter's, Charlotte, NC	12,000
Charlotte Center for Urban Ministry, Charlotte, NC	77,900
Charlotte Communities of Shalom, Charlotte, NC	26,486
Christ Church, Lancaster, SC	38,000
Christ Episcopal Church, Charlotte, NC	382,619
Christ Lutheran Church, Charlotte, NC	53,407
Christ The King Lutheran Church, Charlotte, NC	20,000
Christian Ministry of Lincoln County, Lincolnton, NC	30,750
Church at Charlotte, Charlotte, NC	28,917

Church of the Redeemer, Shelby, NC	33,000
Cokesbury United Methodist Church, Charlotte, NC	100,000
Columbia International University, Columbia, SC	51,282
Cooperative Christian Ministry, Concord, NC	31,500
Covenant Presbyterian Church, Charlotte, NC	46,527
Crown Financial Ministries, Gainesville, GA	12,250
Davidson College Presbyterian Church, Davidson, NC	73,465
Davidson United Methodist Church, Davidson, NC	27,830
Diocese of Charlotte, Charlotte, NC	16,000
East Belmont Presbyterian Church, Belmont, NC	10,000
The Episcopal Church of Our Savior, Rock Hill, SC	12,558
First Baptist Church, Salisbury, NC	18,400
First Baptist Church, Shelby, NC	13,081
First Baptist Church, Spencer, NC	12,000
First Baptist Church, Statesville, NC	11,000
First Presbyterian Church, Albemarle, NC	12,000
First Presbyterian Church, Charlotte, NC	232,483
First Presbyterian Church of Concord, Concord, NC	15,637
First Presbyterian Church, Salisbury, NC	328,089
First Presbyterian Church, Statesville, NC	17,961
First Presbyterian Church, Monroe, NC	31,918
First United Methodist Church, Austell, GA	33,941
First United Methodist Church, Charlotte, NC	57,050
First United Methodist Church, Lexington, NC	43,147
First United Methodist Church, Salisbury, NC	44,970
Forest Hill Presbyterian Church, Charlotte, NC	38,500
Forest Hill United Methodist Church, Concord, NC	20,000
Forest Park Presbyterian Church, Statesville, NC	12,000
Foundation of Shalom Park, Charlotte, NC	282,559
Friendship Baptist Church, Atlanta, GA	15,000
Gideons International - Stanley South Camp, Albemarle, NC	26,800
Grace Community Church, Greensboro, NC	27,041
Grace Fellowship Church, Shelby, NC	14,500
Greater Hickory Cooperative Christian Ministry, Hickory, NC	16,703
International Foundation, Washington, DC	10,000
Jewish Community Center, Charlotte, NC	55,913
Jewish Federation of Greater Charlotte, Charlotte, NC	349,472
King of Kings Church - Charlotte, Charlotte, NC	10,000
Knox Fellowship, Burlingame, CA	10,000
Lausanne Committee for World Evangelization, San Clemente, CA	10,000
Life Teen, Inc., Mesa, AZ	10,000
Living Word Lutheran Church, The Woodlands, TX	21,000
Macedonia United Methodist Church, Mullins, SC	10,000

religion (continued)

Manna Christian Missions, Bonita Springs, FL	28,500
Matthews Presbyterian Church, Matthews, NC	13,000
Meadowview Presbyterian Church, Lexington, NC	10,000
Moravian Church In America Southern Providence, Winston-Salem, NC	62,946
Myers Park Baptist Church, Charlotte, NC	51,200
Myers Park Presbyterian Church, Charlotte, NC	892,556
Myers Park United Methodist Church, Charlotte, NC	261,413
New Covenant Church, Clyde, NC	10,250
Northwestern Rockingham Community Ministries, Madison, NC	10,018
Park Road Baptist Church, Charlotte, NC	37,161
Philadelphia Baptist Church, Stanfield, NC	20,000
Presbyterian Forum Foundation, Greenville, MS	10,000
Providence Baptist Church, Charlotte, NC	59,250
Providence United Methodist Church, Charlotte, NC	27,512
Randleman Friends Meeting, Randleman, NC	16,752
Richland Presbyterian Church, Richland, SC	12,219
St. Gabriel Catholic Church, Charlotte, NC	27,281
St. John's Baptist Church, Charlotte, NC	47,749
St. John's Episcopal Church, Charlotte, NC	637,662
St. John's Lutheran Church, Salisbury, NC	18,123
St. Luke's Episcopal Church, Salisbury, NC	53,935
St. Mark's Evangelical Lutheran Church of Charlotte, Charlotte, NC	26,875
St. Martin's Episcopal Church, Charlotte, NC	19,000
St. Michael's Episcopal Church, Charleston, SC	170,000
St. Peter's Catholic Church, Charlotte, NC	33,150
St. Peter's Episcopal Church, Charlotte, NC	49,037
St. Stephen United Methodist Church, Charlotte, NC	58,500
Sardis Presbyterian Church, Charlotte, NC	115,150
Search Ministries (Charlotte Area), Charlotte, NC	40,861
SIM USA - Serving in Mission, Charlotte, NC	15,507
South Mecklenburg Presbyterian Church, Charlotte, NC	64,000
Stanly Community Christian Ministry, Albemarle, NC	32,860
Steele Creek Presbyterian Church, Charlotte, NC	14,350
Temple Beth El, Charlotte, NC	103,755
Temple Israel, Charlotte, NC	148,802
Transylvania Christian Ministries, Brevard, NC	39,860
Trinity Episcopal Church, Statesville, NC	34,200
Trinity Lutheran Church, Landis, NC	15,000
Trinity Wesleyan Church, Salisbury, NC	10,000
United Ministries, Greenville, SC	25,850

Uptown Christ Covenant Church, Charlotte, NC	92,923
Victory Life Ministry, Paris, PA	10,000
West Stanly Christian Ministry, Stanfield, NC	20,000
Westminster Presbyterian Church, Charlotte, NC	18,250
Women of Vision/World Vision, Laguna Hills, CA	11,500
World Team, Warrington, PA	13,268
Wycliffe Bible Translators, Orlando, FL	14,300
Young Life, Colorado Springs, CO	17,530
Young Life of Charlotte, Charlotte, NC	15,423
Youth With A Mission-Charlotte, Inc., Monroe, NC	10,000
Others (298 less than \$10,000)	\$651,010

## seniors

# \$263,293

Coltrane L.I.F.E. Center, Concord, NC	13,085
Friendship Trays, Charlotte, NC	52,220
Lutheran Services for the Aging, Salisbury, NC	22,312
The Pines at Davidson, Davidson, NC	31,900
Richmond County Hospice, Inc., Rockingham, NC	50,000
Scotia Village Foundation, Laurinburg, NC	10,000
Southminster Foundation, Charlotte, NC	14,850
Others (17 less than \$10,000)	\$68,926

## youth

# \$635,407

Big Brothers Big Sisters of Greater Charlotte, Charlotte, NC	\$12,550
Big Brothers Big Sisters of Metro Chicago, Chicago, IL	11,830
Boy Scouts of America - Central NC Council, Albemarle, NC	30,500
Boy Scouts of America - Mecklenburg County Council, Charlotte, NC	74,439
Boys and Girls Club of the Sandhills, Inc., Southern Pines, NC	25,000
First Tee of Charlotte, Inc., Charlotte, NC	25,500
Girls on the Run, Charlotte, NC	15,550
Hands On Missions, Shelby, NC	80,700
Hispanic Cultural Center of Charlotte, Charlotte, NC	10,000
Make-A-Wish Foundation of Central and Western North Carolina, Charlotte, NC	10,500
Partners in Out-of-School Time (POST), Charlotte, NC	151,993
Right Moves For Youth, Charlotte, NC	42,050
Summit House, Charlotte, NC	10,000
YMCA - Camp Thunderbird, Lake Wylie, SC	12,800
Others (49 less than \$10,000)	\$121,995

# non-endowed gift funds

Non-endowed gift funds enable you to make grant recommendations that may be paid from both income and principal. You may distribute your entire gift fund balance. Gifts are deductible at the time you make them to the Foundation, and you can make grants at times and in amounts most advantageous to you. This partial listing of non-endowed funds is inclusive as of December 2004. Funds established in 2004 are in red.

**DONOR ADVISED FUNDS** allow individuals, families and corporations to be personally involved in the grantmaking process

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Angel Family Fund  
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**B**  
B & B Donor Advised Fund  
James G. & Mary Lou Babb Donor Advised Fund  
Bank of America Corporation Charities Fund  
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Bob and Becky Boulware Donor Advised Fund  
Ty and Pat Boyd Foundation Donor Advised Fund  
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Bob Brady Charitable Gift Fund  
The Joseph L. Brady, Jr. Gift Fund  
Mr. and Mrs. Benton S. Bragg Donor Advised Fund  
Frank Bragg Family Donor Advised Fund  
John F. Bragg, III and Catherine C. Bragg Donor Fund  
Phillips and Leslie Bragg Fund  
Bill and Robin Branstrom Family Fund  
Bridges Family Fund  
Kenneth R. & Nelle N. Brown Donor Advised Fund  
Sharon J. Brown Donor Advised Fund  
Herbert H. Browne, Jr. Fund  
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Kathryn M. and Dennis N. Bunker, III Donor Advised Fund  
Thomas W. and Gail W. Bunn Fund  
Bernard and Patsy Burns Donor Advised Fund  
Nancy and Peter Burroughs Family Fund

**C**  
Mr. and Mrs. C. C. Cameron Donor Advised Fund  
Boyd C. Campbell, Jr. Charitable Donor Advised Fund  
Elizabeth McElwee Cannon Family Fund  
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Sherrill M. Capps Donor Advised Fund  
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Cato Corporation Donor Advised Fund  
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Joe and Janet Caudell Donor Advised Fund  
Eric A. Cerwin Family Fund  
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**David Clark, Jr. Family Trust Fund**  
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David Cohen and Amy Grissom Donor Advised Fund  
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William A. and Jane H. Coley Donor Advised Fund  
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Phyllis C. Coltrane and L. D. Coltrane III Fund  
G. Morrison Creech Donor Advised Fund  
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John Crosland, Jr. Family Donor Advised Fund

Culbertson Family Foundation Fund  
Leslie and John Culbertson Donor Advised Fund  
Cuthbertson Family Donor Advised Fund

**d**  
Larry and Sarah Dagenhart Donor Advised Fund  
Charles O. Dalton Family Donor Advised Fund  
Ruth and Rufus Dalton Donor Advised Fund  
Daniels Family Donor Advised Fund  
John and Susan Davenport Donor Advised Fund  
Joanne C. and Charles T. Davidson Family Fund  
Davis Family Donor Advised Fund  
Davis Family Foundation  
Adelaide and Ned Davis Donor Advised Fund  
Charles K. and Lena P. Davis Donor Advised Fund  
Pahl and Shannon Davis Family Fund  
Donald A. DeLoach Donor Advised Fund  
Susan DeLoach Donor Advised Fund  
Graham and Anne Denton Donor Advised Fund  
Sara C. Dickerson Donor Advised Fund (ADW)  
Sara C. Dickerson Donor Advised Fund (NKD)

**e**  
Jean and Robert Eagle Family Fund  
**The John and Angie Earnhardt Donor Advised Fund**  
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David M. and Aleen F. Epstein Donor Advised Fund  
Eubank Family Advised Fund  
Martha C. Eubanks Donor Advised Fund  
Don and Frances Evans Donor Advised Fund  
**Andy and Mac Everett Fund**

**f**  
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Ray S. and Cydne W. Farris Donor Advised Fund  
Richard and Catherine Ferguson Donor Advised Fund  
First Charter Bank Charitable Foundation Donor Advised Fund  
Fluhme Family Donor Advised Fund  
Smitty and Jill Flynn Family Fund  
Carolyn V. E. Foil Donor Advised Fund  
Anne C. Forrest Family Fund  
Jack Fowler Family Donor Advised Fund  
Mary Elizabeth P. Francis Donor Advised Fund  
Leon and Barbara Frederick Fund  
**The Catherine C. Fuller Donor Advised Fund**  
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**g**  
R. Christopher and Ruth K. Gammon Donor Advised Fund  
Mary Susan Gattis Memorial Donor Advised Fund  
John R. Georgius Donor Advised Fund  
Leonard Statham Gilliam, Jr. and Mary Turner Gilliam Family Advised Fund  
**Godbold Family Fund**  
**Jane and Rusty Goode Donor Advised Fund**  
Dr. Alvin S. and Rachael M. Goodman Donor Advised Fund  
George and Anne Goodyear Donor Advised Fund

Gordon Family Foundation  
Shelton Gorelick Donor Advised Fund  
William T. and Sara S. Graves Donor Advised Fund  
C. Frank and Betsy Griffin Donor Advised Fund  
Mary Jeter Griffin Foundation Fund  
William H. Grigg Donor Advised Fund  
Joseph B. Jr. and Angela M. Grooms Donor Advised Fund  
Price H. and Katherine L. Gwynn Donor Advised Fund

**h**  
Michael R. Haake Family Fund  
Elisabeth G. Hair Donor Advised Fund  
Katherine G. and William S. Hall Donor Advised Fund  
**Bridget-Anne Hampden Fund**  
Carol and Watts Hamrick Donor Advised Fund  
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Harald and Betsy Hansen Family Donor Advised Fund  
Hardaway - Dalton Donor Advised Fund  
C. Marcus and Jean R. Harris Donor Advised Fund  
Hauptfuhrer Family Donor Advised Fund  
Tom and Dana Hearn Donor Advised Fund  
The Henderson Family Fund  
Wade and Carolyn Hendricks Donor Advised Fund  
**The Maurice D. Hinton Heritage Fund**  
Holbrook Donor Advised Fund  
Nikki and John Holcomb Donor Advised Fund  
Thomas and Sara Holderness Donor Advised Fund  
Thomas P. and Lyttleton R. Hollowell Donor Advised Fund  
Hull Family Donor Advised Fund  
David Scott and Jeanette Gilbert Humphries Foundation Fund  
Linda and Thomas Hunter III Donor Advised Fund  
John and Maria Huson Charitable Fund

**i**  
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F. Kenneth and Martha M. Iverson Donor Advised Fund  
**j**  
Forrest A. and June S. Jenkins Donor Advised Fund  
Sarah E. Jetton Donor Advised Fund  
Dr. Edward P. and Bentha S. Johnson Charities  
Mr. and Mrs. James V. Johnson Donor Advised Fund  
Linda I. and Mark P. Johnson Family Donor Advised Fund  
Stanley D. and Dianne D. Johnson Family Donor Advised Fund  
Edwin and Lucille Jones Donor Advised Fund  
Scott M. Jones Family Fund

**k**  
The KMC Fund  
Robert E. Kear Donor Advised Fund  
Sheree Kear Donor Advised Fund  
Mr. and Mrs. Graeme M. Keith Donor Advised Fund  
**The James B. Kelligrew Charitable Gift Fund**  
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Alan Kronovet - Cary Bernstein Family Fund  
Kutteh Family Donor Advised Fund

**L**  
Phil and Beth Lambert Donor Advised Fund  
Pete and Kelli Lash Donor Advised Fund  
Lawton Family Donor Advised Fund  
Dennis and Kay Leffler Donor Advised Fund  
Ruth P. Leffler Donor Advised Fund  
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Mr. and Mrs. Joseph A. Lipe Donor Advised Fund  
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Phil E. Lipe, II Donor Advised Fund  
Little & Associates Architects -  
W. Edwin McMahan Donor Advised Fund  
Mr. and Mrs. Malcolm F. Locke, Jr. Donor Advised Fund  
Josephine Lopez Nonpermanent Donor Advised Fund

**M**  
M633, INC Donor Advised Fund  
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Donor Advised Fund  
Rick and Sandra Magee Family Fund  
Tim Marburger Donor Advised Fund  
Marsh Family Donor Advised Fund  
**Carla and Alex Marsh III Foundation Fund**  
Leslie and Michael Marsicano Donor Advised Fund  
Frances P. and J. Franklin Martin Donor Advised Fund  
Joe and Joan Martin Donor Advised Fund  
John and Joan Martin Donor Advised Fund  
Judy and Ned Martin Donor Advised Fund  
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Thomas N. Massey, Jr. and Renna M. Massey  
Donor Advised Fund  
Al and Lil McAulay, Jr. Donor Advised Fund  
Neill G. McBryde Family Donor Advised Fund  
McCull Foundation Donor Advised Fund  
Dr. Joseph B. McCoy Donor Advised Fund  
The Stewart and Marwen McDowell Family Fund

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**William B. McGuire, Jr. Family  
Foundation Gift Fund**

McKay Donor Advised Fund

Edward B. McKenzie Family Fund

Herman and Olivia McManaway Donor Advised Fund  
Donald A. McMullen, Jr. Donor Advised Fund  
Rebecca T. and William H. McNair Donor  
Advised Fund  
Mark & Anna Mendenhall Donor Advised Fund  
Chester and Maxine Middlesworth Charitable Fund  
Milburn Donor Advised Fund

**James Dewitt Miller III and  
Kaye McKinney Miller Fund**

Will and Missy Miller Family Donor Advised Fund  
K. Heinz Moehring and Ilse Moehring  
Donor Advised Fund  
Mr. and Mrs. George Montague Donor Advised Fund  
Clifford G. Moore, Jr. Donor Advised Fund  
Trudy & Gary Morgan Donor Advised Fund  
John H. Morrison, Jr. and Margaret Knox Morrison Fund  
Moss Family Donor Advised Fund  
Edythe Mullis Donor Advised Fund  
Dr. William F. and Linde L. Mullis Donor Advised Fund  
James and Deidre Myers Family Donor Advised Fund

**N**  
N.C. Catawba - Wateree Habitat Enhancement Fund  
Rolfe and Ann Neill Donor Advised Fund  
Edwin and Jill Newman Donor Advised Fund  
Nancy Nickels Donor Advised Fund  
W. Olin and Marian M. Nisbet Donor Advised Fund  
Charles L. and Vivian H. Norwood Donor Advised

**O**  
Anthony O'Boyle Charitable Fund  
James and Maria Ofelia O'Boyle Charitable Fund  
Thomas and Christine O'Boyle Charitable Fund  
Richard J. Osborne Donor Advised Fund

**P**  
PCM Fund

Palmer Family Fund

John M. and Susan T. Papadopoulos  
Donor Advised Fund

W. Daniel Pate and Sara Jane Pate  
Donor Advised Fund

Patrick Family Donor Advised Fund

Bailey and Rose Patrick Donor Advised Fund

Philippians 4:19 Fund

L. Steven Phillips Fund

Bob and Gretchen Pindell Family Fund

Dr. and Mrs. Harold E. Plaster, Jr. Fund

**Dr. and Mrs. William R. Plaster Fund**

William W. Plyler Donor Advised Fund

Frank S. Poe Donor Advised Fund

John and Ann Porter Family Fund

Jess and Becky Powell Donor Advised Fund

Steven G. Price and Cynthia J. Furr  
Donor Advised Fund

Richard B. and Joan E. Priory Family  
Foundation Fund

**R**  
Lloyd and Margaret Rash Family Advised Fund  
Helen and Craig Redwine Donor Advised Fund

Peter and Cathy Ridder Donor Advised Fund  
Mary C. Rinehart Donor Advised Fund  
Riverside Donor Advised Fund  
Kenneth & Deborah Rivkin Donor Advised Fund  
Anne and Epes Robinson Donor Advised Fund  
Anne and Derek Rogers Donor Advised Fund  
Arthur H. Rogers, Jr. and Sandra P. Rogers Donor Advised Fund  
Rowe Family Donor Advised Fund

**S** Alex and Linda Sanchez Family Donor Advised Fund  
Don and Mary Sanders Donor Advised Fund  
The Saturday Fund for ALS  
James Ellery and Rebecca Miller Saunders Donor Advised Fund  
Vernon H. Scarborough Family Advised Fund  
Dr. Dave Schlenker Memorial Fund  
Louis A. and Martha H. Schmitt Donor Advised Fund  
**Linda C. Seigel Donor Advised Fund**  
Dr. & Mrs. Jay G. Selle Donor Advised Fund  
James W. and Mary Bruce Serene Donor Advised Fund  
James M. and Martha Shannonhouse Donor Advised Fund

Patricia and Harold Shapiro Donor Advised Fund  
Ruth and Colin Shaw Family Fund  
Shea Family Foundation Advised Fund  
**Kate and Raleigh Shoemaker, Jr. Donor Advised Fund**  
Samuel and Raenea Siegel Donor Advised Fund  
John P. and Victoria L. Singleton Donor Advised Fund  
Emily and Zach Smith Donor Advised Fund  
Zebulon V. and Janet T. Smith Donor Advised Fund  
Shelagh Meehan and R. Jordan Smyth, Jr. Fund  
The David R. Snider Fund  
SouthWood Corporation Donor Advised Fund  
C. D. Spangler Foundation Donor Advised Fund  
Squires Foundation Fund  
Fred Stanback Donor Advised Fund  
Staples Family Donor Advised Fund  
Stedman-Norman Donor Advised Fund  
Elaine Steele Donor Advised Fund  
Marjorie Lawrence Stell Donor Advised Fund  
Bill & Katy Stephenson Family Advised Fund  
Sterling Capital Management Donor Advised Fund  
Tim and Kim Stump Donor Advised Fund  
Wesley and Claudia Sturges Donor Advised Fund  
Robert W. & Ruth B. Suddreth Donor Advised Fund

**t** Claire and John Tate Donor Advised Fund  
Gene and Kathy Taylor Fund  
Florence J. Teague Donor Advised Fund  
Lillian and Chris Teigland Donor Advised Fund  
Thomas L. and Ann Fleming Temple Donor Advised Fund  
Frances J. Teter Donor Advised Fund

Austin Thies Donor Advised Fund  
Richard E. Thigpen, Jr. and Nancy S. Thigpen Donor Advised Fund  
Nancy B. Thomas Donor Advised Fund  
Thompson Family Foundation  
Ken and Kathylee Thompson Donor Advised Fund  
Sydnor and Harriette Thompson Donor Advised Fund  
Hellena and Isaiah Tidwell Donor Advised Fund  
Bob & Kay Timberlake Family Donor Advised Fund  
C. H. Timberlake, Jr. Family Donor Advised Fund  
Ed and Lisa Timberlake Family Donor Advised Fund  
Sarah and Larry Tomlinson Donor Advised Fund  
James Traynor Donor Advised Fund

**V** Sally and Bill Van Allen Donor Advised Fund  
Craig and Gail Van Der Veer Donor Advised Fund  
F. William Vandiver Family Fund  
Houston and Katherine VanHoy Donor Advised Fund  
Herb and Tess Verbesey Donor Advised Fund  
James and Brenda Vernon Donor Advised Fund

**W** **Wachovia Capital Partners Fund**  
**Wachovia Corporation Donor Advised Fund**  
Edwin and Mary Walker Donor Advised Fund  
Jim and Linda Wallace Family Fund  
John and Debby Wallace Donor Advised Fund  
Nancy & J. Mason Wallace, Jr. Donor Advised Fund  
Byron and Nancy Walthall Fund  
Robert and Elizabeth Warren Donor Advised Fund  
James B. Webb Family Donor Advised Fund  
**Laura and Ward Wellman Fund**  
Welton Family Donor Advised Fund  
Barry and Kathy Whisnant Donor Advised Fund  
William A. & Elizabeth Smith White Donor Advised Fund  
Whitton-Diamond Family Advised Fund  
The Hunter and Steffanie Widener Charitable Gift Fund  
Nancy Bowen Wiggins Donor Advised Fund  
The Carol Dabbs Wiggs Family Fund  
**Ben and Leah Williams Family Fund**  
William H. Williamson III Donor Advised Fund  
Kathy and Larry Wilson Fund  
Susan and Al Winget Donor Advised Fund  
Women's Impact Fund  
The Worley Family Donor Advised Fund

**Y** Yates Donor Advised Fund  
D. Bryan and Jane S. Young Donor Advised Fund  
Julius Smith Young, Jr. and Katherine Garrity Young Family Donor Advised Fund

**Z** Margaret and Price Zimmermann Donor Advised Fund  
Emily F. and Samuel H. Zimmern Donor Advised Fund

## DESIGNATED FUNDS support worthy causes and nonprofits

**A**  
Afro-American Cultural Center Restricted Fund  
Atkins/N.C. Zoo Society Restricted Fund  
Marian Segal Bennett Musical Arts Endowment Fund  
Anita and Herman Blumenthal Endowment Fund  
Brain Tumor Fund of the Carolinas

### **Julian Brown Memorial Fund**

**C**  
Carolina Foundation For Oral Health Restricted Fund  
Carolina Panthers Charities Donor Advised Fund  
Carolina Panthers Women's Association Fund  
Carolina Raptor Center Restricted Fund

### **Charlotte Lesbian & Gay Fund**

Charlotte Children's Choir Restricted Fund  
Charlotte Children's Scholarship Fund  
Charlotte Day Nursery Endowment Fund  
Charlotte Housing Authority Scholarship Fund  
Charlotte Preschool Partnership Fund  
Charlotte Symphony Orchestra Restricted Fund  
Child Care Resources Restricted Fund  
Children & Family Services Center  
Capital Campaign Fund

### **Children & Youth Convening/Leadership Fund**

Claire Bear's Fund  
Close To A Cure, A Fund for Parkinson's Research  
Cole Foundation Scholarship Fund  
Communities In Schools of Charlotte-Mecklenburg/Think College Restricted Fund  
Community Building Restricted Fund  
Cornelius Library Restricted Fund  
Cynthia and David Crane Endowment for Temple Beth El Fund  
Crisis Assistance Ministry Fund for the Future

### **Crossroads Charlotte Fund**

**D**  
Davidson College Presbyterian Church Gift Fund  
Davidson Community Endowment Fund  
Davidson Community Players Restricted Fund  
Dilworth Rotary Club Foundation Restricted Fund  
Earnhardt Family Advised Fund

### **Environment Convening/Leadership Fund**

**F**  
The Federation Restricted Fund  
The Federation Original Unrestricted Fund  
Stuart P. Fishburne Memorial Endowment Fund  
Sandy Ford Restricted Fund  
Foundation of Shalom Park, Inc. Endowment Fund  
Foundation For The Carolinas Operating Fund  
Friends of Town Creek Indian Mound Restricted Fund  
C. W. Fruit Professional Development Restricted Fund  
General N.C. Zoo Society Restricted Fund  
The Hebrew Cemetery Endowment Fund

**R. Bruce Irons Fund**

Jewish Community Center of Charlotte Endowment Fund

Leave A Legacy Project for the Charlotte Area Fund  
Sadie W. Levin Guest Speaker Endowment for Temple Beth El Fund

### **Levine Museum Foundation Fund**

### **Levine Museum of the New South Fund**

### **Sandra and Leon Levine Fund of the Levine Museum Foundation Fund**

George T. Lewis, Jr. Academic Scholarship Fund  
The Light Factory Restricted Fund

### **London Window and Altar Fund**

**M**  
McMillan Foundation Restricted Fund  
Melasky Nursery Endowment for Temple Beth El Fund  
William F. Mulliss Endowment Fund

### **Myers Park Presbyterian Church Fund**

NC Architectural Foundation Unrestricted Fund  
NC Dance Theatre Restricted Fund

### **North Carolina West District Civitan Scholarship Fund**

### **Palisades Episcopal School Fund**

Partners in Out-of-School Time Fund

### **Gus Purcell / MPHS Fund**

**R**  
Regional REALTOR Association Housing Opportunity Foundation Fund

River Hills Community Church Foundation  
Non-Endowed Fund  
Estate of Rollin Corson Rose

S. A. Schloss Special Book Endowment for Temple Beth El Fund

Mariam Coltrane Schramm Restricted Fund for Concord Benevolences

### **SEED Charlotte Fund**

Shepherd's Center Restricted Fund  
David Silverman Youth Activity Endowment for Temple Beth El Fund

### **Social Capital Convening/Leadership Fund**

The Gabe S. Stewart Memorial Fund

### **The Teaching Fellows Institute at Charlotte Teen Impact Fund**

Teens for Charlotte Donor Advised Fund

Temple Beth El Unrestricted Principal Endowment Fund

The Temple Israel Building Fund

The Temple Israel Capital Fund

The Temple Israel Designated Named Fund

The Temple Israel Education Fund

The Temple Israel Membership Fund

Thompson Children's Home Endowment Funds

**U**  
Union County Library Foundation Restricted Fund

Elizabeth Van Every Endowment Fund

Carol and Joe Voynow Building Maintenance Fund  
WE CARE Fund

Wildacres Leadership Initiative Endowment Fund

### **Wildacres Leadership Initiative Restricted Fund**

### **Wildacres Retreat Endowed Fund I**

### **Wildacres Retreat Endowed Fund II**

YMCA Endowment Funds

Wanda Yates Child Advocacy Fund

Jason Scott Zwerin/N.C. Zoo Restricted Fund

Anonymous - 443 funds

# endowed gift funds

Endowed gift funds are structured so that your donation grows over time and works forever. Your gift principal is never spent and you use the spendable income to make grant recommendations. This partial listing of Endowed gift funds is inclusive as of December 2004. Funds established in 2004 are in red.

## Donor Advised Funds

Enable you to recommend grants from annual earnings to benefit your favorite charities

### Allegro Endowment Fund

Established in 1991 by an anonymous donor for broad charitable purposes.

### Allvac Endowment Fund

Established in 1988 for broad charitable purposes in the Union County, N.C. area.

### Ruth E. Anderson Endowment Fund

Established in 2001 for broad charitable purposes.

### John and Marian Andrews Family Endowment Fund

Established in 1990 for broad charitable purposes.

### Association of Carolina Shag Clubs Endowment Fund

Established in 1992 to enable the Association to make gifts annually to the National Hospice Organization.

### B & B Endowment Fund

Established in 1984 by Mr. and Mrs. A.S. Blankenship Jr. for broad charitable purposes.

### William H. Barnhardt Endowment Fund

Established in 1986, this endowment is one of five under the will of William H. Barnhardt for broad charitable purposes.

### Lee and Sandra Basinger Family Advised Endowment Fund

Established in 1999 with broad charitable purposes.

### George W. Baxter Endowment Fund

Established in 1981 with broad charitable purposes.

### Mary Lou Bleu Endowment Fund

Established in 1988 with broad charitable purposes.

### Philip and Amy Blumenthal Family Advised Endowment Fund

Established in 2000 for broad charitable purposes.

### Bridge Builder Foundation Endowment Fund

Established in 2001 for broad charitable purposes.

### Emmett W. and Elizabeth H. Bringle Endowment Fund

Established in 1989 by Southern Webbing Mills in honor of the Bringles and in recognition of their service to the company.

### Julian C. and Dona W. Burroughs Endowment Fund

Established in 2000 for broad charitable purposes.

### Carolina Circle Endowment Fund

Established in 1985 under the will of a resident of Winston-Salem, N.C., with broad charitable purposes.

### Morris Curlee Family Endowed Fund

Established in 2004 for broad charitable purposes.

### Anne and Don Davidson Endowment Fund

Established in 1985 by Anne and Don Davidson for the benefit of the First Presbyterian Church of Charlotte. In particular, the fund will benefit the church's urban ministry and support in other ways the existence of a Christian theological and ethical conscience within the heart of Charlotte.

### Gratitude Endowment Fund

Established in 1990 for broad charitable purposes.

### Romola D. Hardy Endowment 1 Fund

Established in 1981 for the support of community projects of Charlotte Rotary Club #256. A gift is made annually in memory of Mrs. Hardy's husband, Harry, who was a member of that club.

### Romola D. Hardy Endowment 2 Fund

Established in 1991, this fund is designated for the Foundation's unrestricted grantmaking.

### Barbara T. Hautau Endowment Fund

Established in 1989 in honor of Barbara Hautau for 15 years of service to the Foundation as its vice president.

### Dr. W. D. and Betty K. Holbrook Endowment Fund

Established in 1991 for broad charitable purposes.

### Hull Foundation Endowment Fund

Established in 1993 by Dr. William M. Hull for broad charitable purposes.

### Knight Foundation Donor Advised Fund for Horry County, SC

Established in 1999 by the John S. and James L. Knight Foundation of Miami, Fla., for the benefit of Waccamaw Community Foundation.

### Knight Foundation Endowment Fund

Established in 1988 by the John S. and James L. Knight Foundation of Miami, Fla., for charitable purposes in the Carolinas.

### Lancaster Breakfast Rotary Club Endowment Fund

Established in 1992 for broad charitable purposes.

### The Margaret J. Leath Donor Advised Fund

Established in 2003 for broad charitable purposes.

### Matthew 25 Donor Advised Endowment Fund

Established in 2001 for broad charitable purposes.

### James J. and Dorothy F. McCarthy Endowment Fund

Established in 1990 with broad charitable purposes by Swimmer Insurance Agency to honor the McCarthys for their service to the community.

### Doris and John Miller Endowment Fund

Established in 1995 to support private schools, Shrine Hospital programs, childrens' homes, retirement centers and Central United Methodist Church in Charlotte, N.C.

### Clifford G. Moore Jr. Endowment Fund

Established in 1983 with broad charitable purposes.

### Myers Endowment Fund

Established in 1991 by Brevard S. and Beatrice W. Myers with broad charitable purposes.

### National Welders Supply Company Endowment Fund

Established in 1994 for broad charitable purposes.

### North State Communications Endowment Fund

Established in 1990 with broad charitable purposes.

### Richard Osborne Endowment Fund

Established in 2001 for broad charitable purposes.



**Carolyn Walker Owens and Charles William Owens Fund**

Established in 1993 to benefit broad charitable purposes including the youth program at Sugaw Creek Presbyterian Church.

**Wilton L. and Mary W. Parr Foundation Endowment Fund**

Established in 1991 with broad charitable purposes.

**Patrick Family Endowment Fund**

Established in 1994 for broad charitable purposes.

**Andy Pitts Memorial Endowment Fund**

Established in 1985 in memory of Noah A. "Andy" Pitts with broad charitable purposes.

**Thomas E. and Rosemary I. Rogers Endowment Fund**

Established in 2001 for broad charitable purposes.

**James M. and Ellen Ross Foundation Endowment Fund**

Established in 2000 for broad charitable purposes.

**Bob and Wilma Shaw Endowment Fund**

Established in 1978 with broad charitable purposes.

**Tappy Family Endowment Fund**

Established in 2000 for broad charitable purposes.

**Anne L. Van Every and Thomas Walter Glenn III Endowment Fund**

Established in 1981 with broad charitable purposes.

**Capt. Salem A. Van Every Endowment Fund**

Established in 1983 with broad charitable purposes.

**S. Lance Van Every Endowment Fund**

Established in 1981 with broad charitable purposes.

**Robert and Elizabeth Warren Endowment Fund**

Established in 1999 with broad charitable purposes.

**Ed and Agnes Weisiger Endowment Fund**

Established in 1994 for broad charitable purposes.

**Designated Funds**

**Allow you to support the good works of any nonprofit**

**ASC Unrestricted Fund**

Established in 2002 for the benefit of the Arts & Science Council.

**Afro-American Children's Theatre Endowment Fund**

Established in 2002 for the benefit of the Afro-American Children's Theatre.

**Afro-American Cultural Center Endowment Fund**

Established in 2002 for the benefit of the Afro-American Cultural Center.

**American Cancer Society Endowment Fund**

Established in 1996 to benefit the American Cancer Society's general operations, this endowment was created by the late Bessie W. Ray through a charitable remainder unitrust.

**American Guild of Organists Endowment Fund**

Established in 2002 for the benefit of the American Guild of Organists.

**American Red Cross Greater Carolinas Chapter Fund**

Established in 1985 for the benefit of the American Red Cross Greater Carolinas Chapter.

**Arthritis Patient Services Endowment Fund**

Established in 1980 for arthritis education, research and patient support activities.

**Arts Council of Rock Hill and York County Endowment Fund**

Established in 2004 for the benefit of the Arts Council of Rock Hill and York County.

**Arts Education Training Institute Endowment Fund**

Established in 2002 by the Arts & Science Council for the benefit of the Arts Education Training Institute.

**Arts Education Fund**

Established in 2002 by the Arts & Science Council for the benefit of arts education.

**Arts Endowment Fund**

Established in 1975 for the benefit of the Arts and Science Council to honor J. Walter Barr, one of the founders and the first president of the Council.

**Barnhardt/Thomas Endowment For the Arts (PAC) Fund**

Established in 1990 by contributions from Mrs. William H. Barnhardt, Mr. J. David Barnhardt, Mr. and Mrs. William M. Barnhardt, Mr. and Mrs. William D. Thomas, Mr. and Mrs. R. Alan Barnhardt, Mr. Steven F. Barnhardt, Mr. Thompson B. Barnhardt, Mr. and Mrs. William B. Barnhardt, Mr. and Mrs. William B. Thomas, and Southern Webbing Mills, Inc. This endowment is designated for the Performing Arts Center.

**Barnhardt/Thomas Endowment for the Arts (Symphony) Fund**

Established in 1990 by contributions from Mrs. William H. Barnhardt, Mr. J. David Barnhardt, Mr. and Mrs. William M. Barnhardt, Mr. and Mrs. William D. Thomas, Mr. and Mrs. R. Alan Barnhardt, Mr. Steven F. Barnhardt, Mr. Thompson B. Barnhardt, Mr. and Mrs. William B. Barnhardt, Mr. and Mrs. William B. Thomas, and Southern Webbing Mills, Inc. This endowment is designated for the Charlotte Symphony.

**Barbara K. Bernstein Lion of Judah Endowment Fund for the Charlotte Jewish Federation**

Established in 1997 to provide annual contributions to the Lion of Judah Campaign for the Jewish Federation of Greater Charlotte.

**Donald H. Bernstein Federation Continuity Fund**

Established in 1997 to provide annual campaign contributions to the Jewish Federation of Greater Charlotte.

**Donald H. and Barbara K. Bernstein Foundation of Shalom Park Continuity Fund**

Established in 1999 to benefit Foundation of Shalom Park.

**Donald H. and Barbara K. Bernstein NCDT Continuity Fund**

Established in 2003 to benefit the North Carolina Dance Theatre Endowment.

**Donald H. and Barbara K. Bernstein Spoleto Festival USA Continuity Fund**

Established in 2001 for the benefit of Spoleto Festival USA.

**Donald H. and Barbara K. Bernstein Temple Beth El Continuity Fund**

Established in 1997 to benefit the general activity and operation of Temple Beth El.

**Bethlehem Center Endowment Fund**

Established in 1990 to celebrate the 50th anniversary of the Bethlehem Center.

**Billy Graham Evangelistic Association Endowment Fund**

Established in 1986, this endowment is one of five under the will of William H. Barnhardt to provide annual income for the Billy Graham Evangelistic Association.

**Bioethics Resource Group Ltd. Endowment Fund**

Established in 1992 to benefit the programs of Bioethics Resource Group Ltd., which exists to provide leadership in dealing with difficult issues of medicine and ethics.

**Henrietta Blakeney Endowment Fund**

Established in 1994 for the benefit of St. Paul's Episcopal Church of Monroe, N.C.

**Blue Ridge Parkway Foundation Endowment Fund**

Established in 2000 for the benefit of the Blue Ridge Parkway Foundation.

**Boy Scouts of America - Mecklenburg Council Fund**

Established in 1982 for the benefit of the Mecklenburg County Council, Boy Scouts of America. The first gift to the fund was made in memory of R. Michael Beck and Lori Pfann.

**Boy Scouts of America - Mecklenburg Council Fund**

Established in 1986, this endowment is one of five under the will of William H. Barnhardt to provide annual income for the Boy Scouts of America - Mecklenburg County Council.

**Boys Home of York County Endowment Fund**

Established in 1991 for the benefit of Boys Home of York County, S.C.

**Dr. Ralph Brauer Endowment for the Benefit of University of North Carolina - Wilmington**

Established in 2000 for the benefit of UNC Wilmington.

**Will Bremer Memorial Music Endowment Fund**

Established in 1996 to benefit the music programs at St. Paul's Episcopal Church in Monroe, N.C.

**Stanford R. Brookshire Endowment Fund**

Established in 1979 for the benefit of High Point University, High Point, N.C.

**CFIDS Association of America Endowment Fund**

Established in 1994 for the benefit of the Chronic Fatigue and Immune Dysfunction Syndrome Association of America.

**Karen T. Calhoun Memorial Education Arts Fund**

Established in 1993 for the benefit of the Union County Community Arts Council as a memorial to Karen T. Calhoun. The purpose of the fund is to support the advancement of arts education in Union County Schools.

**Carolina Raptor Center Endowment Fund**

Established in 2002 for the benefit of the Carolina Raptor Center.

**Carolina Raptor Center Endowment Fund**

Established in 2004 for the benefit of the Carolina Raptor Center.

**Carolina Voices Endowment Fund**

Established in 1980 for the benefit of Carolina Voices.

**Carolina Voices Endowment Fund**

Established in 2002 for the benefit of Carolina Voices.

**Carolinas Concert Association Goodrich Education Endowment Fund**

Established in 1993 for the benefit of Carolinas Concert Association.

**Central United Methodist Church Endowment Fund**

Established in 1986 for the benefit of Central United Methodist Church in Shelby, N.C.

**Charlotte Area Personnel Fund of the Public Library of Charlotte and Mecklenburg County**

Established in 1999 for the benefit of the Charlotte-Mecklenburg Public Library.

**Charlotte Children's Choir Endowment Fund**

Established in 2002 for the benefit of the Charlotte Children's Choir.

**Charlotte Civic Orchestra Endowment Fund**

Established in 2002 for the benefit of the Charlotte Civic Orchestra.

**Charlotte Community Day Care Endowment Fund**

Established in 1987 by a gift from an anonymous donor to build and endow the YWCA Uptown Child Development Center.

**Charlotte Country Day School Endowment Fund**

Established in 1979 for the benefit of Charlotte Country Day School with one-half of the net income to be used for scholarships and one-half for unrestricted use.

**Charlotte Emergency Housing Endowment Fund**

Established in 1996 to support its mission in providing homeless families with secure transitional housing and comprehensive services.

**Charlotte-Mecklenburg Public Library Endowment Fund**

Established in 1992 to enrich and enhance the services, programs and special collections of the Charlotte-Mecklenburg Public Library.

**Charlotte-Mecklenburg Public Schools Endowment Fund**

Established in 1985 for the benefit of the Charlotte-Mecklenburg Board of Education and the public schools under its jurisdiction.

**Charlotte-Mecklenburg Senior Center Building Fund**

Established in 1997 to maintain and make necessary repairs to the current building.

**Charlotte-Mecklenburg Senior Centers Endowment Fund**

Established in 1994 for the benefit of the Charlotte-Mecklenburg Senior Centers.

**Charlotte Museum of History & Hezekiah Alexander Homesite Endowment Fund**

Established in 1990 for the benefit of the Hezekiah Alexander Foundation.

**Charlotte Rehabilitation Hospital Endowment Fund**

Established in 1981 for the benefit of the Charlotte Institute of Rehabilitation.

**Charlotte Repertory Theatre Endowment Fund**

Established in 2002 for the benefit of the Charlotte Repertory Theatre.

**Charlotte Speech and Hearing Center Endowment Fund**

Established in 1980 for the benefit of the Charlotte Speech and Hearing Center.

**Charlotte Symphony Orchestra Endowment Fund**

Established in 1978 for the benefit of the Charlotte Symphony Orchestra.

**Charlotte Symphony Orchestra Endowment Fund**

Established in 2002 for the benefit of the Charlotte Symphony Orchestra.

**Chemical Dependency Center of Charlotte Fund**

Established in 1978 for the benefit of the Chemical Dependency Center.

**Cherokee County Operating Endowment**

Established in 2003 to provide operating revenues for Cherokee County Community Foundation.

**Cherokee Disabilities Endowment Fund**

Established in 2004 for the benefit of the Cherokee County Disabilities and Special Needs Board, which provides family support, day and residential services for children and adults with disabilities and their families, and prevention education.

**Child Care Resources Endowment Fund**

Established in 1984 for the benefit of Child Care Resources. The first gift to the fund was in memory of Captain Steven F. Locke.

**Children's Home Society Endowment Fund**

Established in 1978 for the benefit of the Children's Home Society in Mecklenburg County.

**Children's Homes of Cleveland County, Inc. Fund**

Established in 1996 to support the special needs of Cleveland County children who are in residential care due to abuse and neglect.

**Children's Theatre of Charlotte Endowment Fund**

Established in 2002 for the benefit of Children's Theatre of Charlotte.

**Cleveland County Memorial Library Endowment Fund**

Established in 1993 for the benefit of Cleveland County Memorial Library.

**Columbia International University Endowment Fund**

Established in 1987, the fund supports the training of missionaries to develop new churches.

**Communities In Schools of Charlotte-Mecklenburg, Inc. Endowment Fund**

Established in 2000 for the benefit of Communities in Schools of Charlotte-Mecklenburg, Inc.

**Community Health Services in Mecklenburg & Union Fund**

Established in 1979 for the benefit of Community Health Services.

**Community School of the Arts Endowment Fund**

Established in 2002 for the benefit of Community School of the Arts.

**Evelyn D. Cormier Endowment Fund**

Established in 2002 to benefit the Public Library of Charlotte and Mecklenburg County.

**Cornelius Library Endowment Fund**

Established in 1999 to benefit the Cornelius Library.

**Katherine B. Couch Endowment for the Oratorio Fund**

Established in 1984 by Miss Couch for the benefit of the Oratorio Singers of Charlotte.

**Council for Children Endowment Fund**

Established in 1982 for the benefit of the Council for Children.

**York Cress Endowment Fund**

Established in 1993 under the will of York Cress through the First Union Foundation to benefit broad charitable interests in Cabarrus County.

**Crisis Assistance Ministry Endowment Fund**

Established in 1981 for the benefit of Crisis Assistance Ministry.

**Anne and Don Davidson Charitable Endowment Fund**

Established in 1997 for support of organizations designated by the donors.

**Discovery Place Endowment Fund**

Established in 1979 for the benefit of Discovery Place.

**Discovery Place Endowment Fund**

Established in 2002 for the benefit of Discovery Place.

**Discovery Place/Nature Museum Endowment Fund**

Established in 2002 for the benefit of Discovery Place and the Nature Museum.

**Dore Academy Endowment Fund**

Established in 1999 for the benefit of the students and programs of Dore Academy.

**Emerging Artist Grants Fund**

Established in 2002 by the Arts & Science Council for the benefit of emerging artists.

**Durant W. Escott Memorial Fund of the Public Library of Charlotte and Mecklenburg County Fund**

Established in 1999 for the benefit of the Charlotte-Mecklenburg Public Library.

**Louis Feldman Food Endowment for Jewish Family Services**

Established in 2000 to benefit the families and individuals served by Jewish Family Services.

**First United Methodist Church Endowment Fund**

Established in 1986 for the benefit of the First United Methodist Church in Austell, Ga.

**Florence Crittenton Services Endowment Fund**

Established in 1979 for the benefit of Florence Crittenton Services.

**Leighton Ford Ministries Endowment Fund**

Established in 1996 to support efforts to prepare young Christian leaders for ministry. The endowment was established from the William H. Barnhardt endowment fund whose advisors are J. David Barnhardt, William M. Barnhardt and Nancy B. Thomas.

**Foundation of Shalom Park, Inc. Endowment Fund**

Established in 1998 for the benefit of Foundation of Shalom Park.

**Friendship Trays Endowment Fund**

Established in 1980 for the benefit of Friendship Trays, a meals-on-wheels program for the elderly and homebound.

**Paul Hughston Frowein Endowment Fund**

Established in 1989 by the First Presbyterian Church, Lancaster, S.C. to provide postgraduate scholarships for ministry or church affiliated work.

**Hoyt Galvin/Friends of the Library Trust Endowment Fund**

Established in 1980 for the benefit of the Public Library of Charlotte and Mecklenburg County to provide funds for special library acquisitions, activities, or scholarships for which budgeted funds are not available.

**C. W. & Catherine Gilchrist Endowment Fund**

Established in 1997 for the benefit of Crisis Assistance Ministry, Queens University, Presbyterian Hospital, Discovery Place and Foundation For The Carolinas.

**Good Fellows Club Endowment 1 Fund**

Established in 1979 to benefit the Good Fellows Club, which provides financial assistance to needy residents of Mecklenburg County.

**Good Fellows Club Endowment 2 Fund**

Established in 1994 to benefit the Good Fellows Club, which provides financial assistance to needy residents of Mecklenburg County.

**Todd and Stacy Gorelick Endowment for the Jewish Federation of Greater Charlotte**

Established in 2004 to provide annual campaign contributions to the Major Gift Campaign and the Lion of Judah Campaign for the Jewish Federation of Greater Charlotte.

**William and Patricia Gorelick Family Executive Incentive Endowment Fund**

Established in 1996 for the benefit of the Mint Museum of Art for its Executive Incentive Program.

**Greater Statesville Rotary Club Endowment Fund**

Established in 1992 for broad charitable purposes.

**Greenspon/Goldstein Family Endowment Fund**

Established in 1996 to support diabetes research on an international level through the Charlotte Chapter of the Juvenile Diabetes Foundation.

**Edna Tarlton Griggs Endowment Fund**

Established in 1994 in memory of Edna Tarlton Griggs for the benefit of Hopewell United Methodist Church of Peachland, N.C.

**Habitat for Humanity of Charlotte Endowment Fund**

Established in 1999 for the benefit of Habitat for Humanity.

**Mrs. A. J. Hagood Endowment for Bethlehem Center Fund**

Established in memory of Mrs. A. J. Hagood for the benefit of the Bethlehem Center.

**J. Hyatt Hammond Scholarship Endowment Fund**

Established in 2003 by the North Carolina Architecture Foundation to provide scholarships for young professionals to attend the American Institute of Architects' North Carolina Summer Design Conference.

**Julie Hargrave Library Endowment Fund**

Established in 1986 in memory of Julie Hargrave for the benefit of the Montclair Elementary School library in Charlotte, N.C.

**Harriet Cuthbertson Endowment Fund**

Established in 2002 by the Arts & Science Council.

**Deborah Harris Arts Education Fund**

Established in 2002 by the Arts & Science Council.

**Hornets' Nest Girl Scout Council Endowment Fund**

Established in 1984 for the benefit of the Hornets' Nest Girl Scout Council.

**Hospice at Charlotte Endowment Fund**

Established in 1983 for the benefit of Hospice at Charlotte.

**Hospice of Cleveland County Endowment Fund**

Established in 1987 to benefit Hospice of Cleveland County.

**Hospice of Union County Endowment Fund**

Established in 1990 for the benefit of Hospice of Union County.

**Regional REALTOR Association Housing Opportunity Endowment Fund**

Established in 2003 to provide funding for affordable housing in Mecklenburg County.

**Lois Howard Endowment Fund (For LifeSpan Inc.)**

Established in 1993 for the benefit of LifeSpan to support programs at the Developmental School and Lakeview.

**Robert and Doris Huckabee Memorial Fund**

Established in 2002 to benefit the Public Library of Charlotte and Mecklenburg County.

**Humanities Endowment Fund**

Established in 2000 for the benefit of the Public Library of Charlotte and Mecklenburg County.

**Innovative Theatre Endowment Fund**

Established in 2002 for the benefit of the Innovative Theatre Company.

**International House Endowment Fund**

Established in 1984 for the benefit of International House.

**Iredell-Statesville Public Schools Endowment Fund**

Established in 1991 by Chester and Maxine Middlesworth for the benefit of the Iredell-Statesville Public Schools. Additional gifts from the public are encouraged.

**Jewish Community Center of Charlotte Endowment Fund**

Established in 1997 to provide annual support for the general activity and operation of the Sandra and Leon Levine Jewish Community Center.

**Jewish Community Center of Charlotte - General Endowment Fund**

Established in 2003 to provide annual support for the general activity and operation of the Sandra and Leon Levine Jewish Community Center.

**Annabel Lambeth Jones Endowment 1 Fund**

Established in 1980 to honor Annabel Lambeth Jones. It was established for the benefit of Brevard College (the Annabel Lambeth Jones Dormitory) and the Western N.C. Conference of the United Methodist Church for the Ministers' Pension Fund.

**J. A. Jones Endowment for the Greater Enrichment Program**

Established in 2000 for the benefit of the Greater Enrichment Program.

**Junior Achievement Endowment Fund**

Established in 1993 for the benefit of Junior Achievement of Charlotte.

**Kamphoefner Endowment Fund**

Established in 2003 by the North Carolina Architecture Foundation to provide Recognition Fellowship Awards in Modernist Architecture.

**Hoyt S. Keeter, Sr. Endowment Fund**

Established in 1997 for the benefit of the Cleveland County Community Foundation to provide support to Gardner-Webb University, First Baptist Church in Shelby and programs to support indigent people in Cleveland County, N.C.

**Julia Kendall Endowment Fund**

Established in 1994 for the benefit of St. Paul's Episcopal Church of Monroe, N.C.

**Kennedy Campus of Elon Homes for Children Fund**

Established in 1982 for the benefit of Elon Homes for Children, Kennedy Campus in Charlotte.

**Kinder-Mourn Endowment Fund**

Established in 1990 for the benefit of Kinder-Mourn, which provides counseling and support services to parents who have lost a child.

**William States Lee Institute Endowment Fund**

Established in 2001 for the benefit of the William States Lee Institute.

**The Leon Levine Family Endowment for the Jewish Community Center Fund**

Established in 1998 to provide annual support for the general activity and operation of the Sandra and Leon Levine Jewish Community Center.

**Leon Levine Foundation/Sandra & Leon Levine Endowment Fund for Temple Beth El**

Established in 2004 to benefit Temple Beth El.

**Leon Levine Foundation Endowment for Shalom Park - Sandra and Leon Levine**

Established in 2004 to provide endowed assets to benefit the operation, maintenance and management of Foundation of Shalom Park.

**Mary Ann Levinson, Rose Cohen & Christine Maier Endowment**

Established in 1998 to promote the broad charitable purposes of Jewish Family Services.

**Life Enrichment Center of Cleveland County Fund**

Established in 1987 to benefit the Life Enrichment Center, an adult day care service, in Shelby, N.C.

**LifeSpan Inc. Endowment Fund**

Established in 1984 for the benefit of LifeSpan, which provides services to mentally challenged children and adults.

**The Light Factory Endowment Fund**

Established in 2002 for the benefit of The Light Factory.

**Lincoln County Community Foundation Endowment to Benefit Christian Ministry of Lincoln County, Inc.**

Established in 2001 for the benefit of Christian Ministry of Lincoln County, Inc.

**Lincoln Memorial Fund of the Public Library of Charlotte and Mecklenburg County**

Established in 1999 for the benefit of the Charlotte-Mecklenburg Public Library.

**Nina Lyon Memorial Fund of the Public Library of Charlotte and Mecklenburg County**

Established in 1999 for the benefit of the Charlotte-Mecklenburg Public Library.

**W. Reid Martin Endowment Fund**

Established in 2001 for the benefit of Communities in Schools of Rockingham County, N.C.

**Sara Couch Masten Endowment Fund**

Established in 2003 for the benefit of charitable activities in Mecklenburg County.

**The Mauney Memorial Library Endowment Fund**

Established in 1998 for the benefit of the Jacob S. Mauney Memorial Library in Kings Mountain, N.C.

**Louise Ray Mayo Memorial Fund of the Public Library of Charlotte and Mecklenburg County**

Established in 1999 for the benefit of the Charlotte-Mecklenburg Public Library.

**McColl Center for Visual Art - CHC Artist-in-Residence Endowment**

Established in 2002 for the benefit of the Artist-in-Residence program at the McColl Center for Visual Art.

**McColl Center for Visual Art - VA Endowment**

Established in 2002 for the benefit of the McColl Center for Visual Art.

**Gail McKnight Staff Development Fund of the Public Library of Charlotte and Mecklenburg County**

Established in 1999 for the benefit of the Charlotte-Mecklenburg Public Library.

**Charles B. McLin Endowment Fund of the Public Library of Charlotte and Mecklenburg County**

Established in 1999 for the benefit of the Charlotte-Mecklenburg Public Library.

**Sam and Carolyn McMahon, Jr. Endowment Fund**

Established in 1988 to benefit the Community School of the Arts in Charlotte, N.C.

**Mecklenburg 4-H Endowment Fund**

Established in 1979 for the benefit of the Mecklenburg County 4-H.

**Metrolina Association for the Blind Endowment Fund**

Established in 1980 for the benefit of the Metrolina Association for the Blind.

**Mint Museum of Art Endowment Fund**

Established in 1977 as a permanent fund for the benefit of the Mint Museum of Art.

**Mint Museum of Art Endowment Fund**

Established in 2002 for the benefit of the Mint Museum of Art.

**Mint Museum of Craft & Design - Visual Arts Endowment**

Established in 2002 for the benefit of the Mint Museum of Craft & Design.

**Dorothy L. Moline Endowment Fund for the National Kidney Foundation of North Carolina**

Established in 1981 in memory of Dorothy L. Moline for the benefit of the National Kidney Foundation of N.C., Mecklenburg Chapter.

**Monroe High School Educational Foundation Fund**

Established in 1992 to benefit the public schools in Union County, N.C.

**Margaret Parker Moss Endowment for Mint Museum Fund**

Established in 1986 in memory of Margaret Parker Moss for the benefit of special programs of the Education Department of the Mint Museum of Art.

**The Warren and Louise Moss Memorial Fund**

Established in 2004 to be used for general purposes including assisting in education, mission projects and other related charitable opportunities for Hopewell Baptist Church, Blacksburg, S.C.

**NC Blumenthal Performing Endowment Fund**

Established in 2002 for the benefit of NC Blumenthal Performing Arts Center.

**NC Dance Theatre Endowment Fund**

Established in 2002 for the benefit of the NC Dance Theatre.

**National Conference for Community and Justice/NCCJ Fund**

Established in 1994 for the benefit of The National Conference for Community and Justice.

**Nevins Center Endowment Fund**

Established in 1983 for the benefit of the Nevins Center, which serves mentally and physically challenged adults.

**New Works Fund**

Established in 2002 by the Arts & Science Council for the benefit of new works.

**North Carolina School of the Arts Endowment Fund**

Established in 1981 for the benefit of the North Carolina School of the Arts.

**Old Waxhaw Presbyterian Church Historic Cemetery Fund**

Established in 1994 for the benefit of the Historic Cemetery at the Old Waxhaw Presbyterian Church of Lancaster, S.C.

**The Opera Carolina - William Randolph Hearst Education Fund**

Established in 1977 for the benefit of Opera Carolina.

**Opera Carolina Endowment Fund**

Established in 2002 for the benefit of Opera Carolina.

**Nicki Ostrow Endowment Fund**

Established in 2004 to provide annual contributions to the Lion of Judah Campaign for the Jewish Federation of Greater Charlotte.

**The Our Saviour Foundation Fund**

Established in 2002 to benefit the Episcopal Church of Our Saviour in Rock Hill, S.C.

**Our Towns of North Mecklenburg/South Iredell Habitat for Humanity, Inc. Endowment Fund**

Established in 1999 for the benefit of Our Towns of Lake Norman Habitat for Humanity.

**PAC Activity Endowment**

Established in 2002 by the Arts & Science Council for the benefit of PAC activity.

**Parkinson's Association Endowment Fund**

Established in 1985 for the benefit of the Parkinson's Association of Mecklenburg County, a division of Community Health Services.

**D. Lindsay Pettus Conservation Endowment Fund**

Established in 1997 for the benefit of the Katawba Valley Land Trust.

**Planned Parenthood of North Carolina-West Fund**

Established in 1985 for the benefit of Planned Parenthood. The initial gift to establish this fund was from the Blumenthal Foundation.

**Elizabeth Ramsey Poole Endowment Fund**

Established in 1993 for the benefit of LifeSpan.

**Robert C. and Mary Allen Price Endowment Fund**

Established for the benefit of the First Presbyterian Church, Rockingham, N.C.

**Rankin Museum Endowment Fund**

Established in 1997 for the benefit of the Rankin Museum of American Heritage located in Ellerbe, N.C.

**Regional Arts Council Endowment Fund**

Established in 2002 by the Arts & Science Council for the benefit of the Regional Arts Council.

**Clyde L. Richardson and Martha S. Richardson Memorial Fund**

Established in 2001 for the purpose of assisting the mentally disadvantaged or physically handicapped as a result of visual and hearing impairments in Union County, N.C.

**Richmond County Hospice Endowment Fund**

Established in 1990 for the benefit of Richmond County Hospice.

**Ridout Mission and Outreach Fund**

Established in 2002 to benefit the Episcopal Church of Our Saviour in Rock Hill, S.C.

**James A. Risser Memorial Fund (JAR Fund)**

Established in 2004 for the benefit of Helping Hands Health Clinic.

**David Thomas Ritch Foundation Designated Endowment**

Established in 2001 to provide programming and luxury items that will draw others to visit The Dowd House.

**River Hills Community Church Foundation Endowed Fund**

Established in 2003 to provide support to the programs at River Hills Community Church.

**Rock Hill Parks Foundation Fund**

Established in 2004 to benefit the City of Rock Hill parks, recreation and tourism.

**Rotary Club of Statesville Endowment Fund**

Established in 1991 for charitable projects of the Rotary Club in Statesville, N.C.

**Salvation Army Endowment Fund**

Established in 1989 for the benefit of Salvation Army programs in the greater Charlotte area.

**The Salvation Army in the United States of America Endowment Fund**

Established in 1996 for the benefit of the Salvation Army in the United States.

**Science Education Fund**

Established in 2002 by the Arts & Science Council for the benefit of science education.

**Second Harvest Food Bank of Metrolina Endowment Fund**

Established in 2000 for the benefit of Second Harvest Food Bank of Metrolina.

**Second String Santas Endowment Fund**

Established in 1994 for the benefit of Second String Santas, an organization that provides Christmas presents for needy children.

**Linda Seigel Lion of Judah Endowment Fund**

Established in 2003 to provide annual contributions to the Lion of Judah Campaign for the Jewish Federation of Greater Charlotte.

**Seigle Avenue Presbyterian Church Endowment Fund**

Established in 1994 for the benefit of Seigle Avenue Presbyterian Church to provide support for the Church's programs for youth.

**Seigle Avenue Preschool Cooperative Endowment Fund**

Established in 1993 for the benefit of Seigle Avenue Preschool Cooperative.

**Silas Alexander Sharpe Foundation Endowment Fund**

Established in 1997 to benefit the Silas Alexander Sharpe Homeplace located in Statesville, N.C.

**Shelter for Battered Women Endowment Fund**

Established in 1998 to benefit the Shelter for Battered Women.

**Shepherd's Center Endowment Fund**

Established in 1987 for the benefit of Sheperd's Center, which provides educational opportunities and services to senior citizens.

**The Raenea and Sam Siegel General Endowment Fund for Temple Beth El**

Established in 2004 to benefit Temple Beth El.

**Kimberly Ann Sipes Memorial Endowment Fund**

Established in 1994 in memory of Kimberly Ann Sipes for the benefit of Florence Crittenton Services.

**Rachel and Ty Snoddy Endowment Fund**

Established in 1998 for the Cleveland County Memorial Library to benefit the library.

**Shaw and Jack Spiers Endowment Fund**

Established in 2002 to provide scholarships to students at Brevard College with an interest in Christian ministry or other areas of Christian service.

**The Late Lenora S. Stein Tzedakah Endowment**

Established in 2004 for cystic fibrosis research and the Art Angel Fund of Fiorello Laguardia High School.

**Marjorie Warlick Tate Child Care Assistance Endowment Fund**

Established in 1997 to provide funds to Child Care Resources to support developmental services for special needs children.

**John Taylor Memorial Scholarship Fund**

Established in 2003 to support education programs at The Light Factory.

**Theatre Charlotte Endowment Fund**

Established in 2002 for the benefit of Theatre Charlotte.

**Teresa S. and Laura H. Thomas Endowment Fund**

Established in 1981 for the benefit of Discovery Place. The two sisters established this fund in memory of their aunts, Alice H. Wickersham and Alice F. Hogans.

**Thornwell Endowment Fund**

Established in 1996, the Thornwell Endowment supports the Thornwell Lecture Series.

**Union County Community Arts Council Endowment Fund**

Established in 1990 for the benefit of Union County Community Arts Council.

**United Family Services Endowment Fund**

Established in 1998 for the benefit of United Family Services.

**United Methodist Agency For The Retarded Endowment Fund**

Established in 1997 for the benefit of the United Methodist Agency For The Retarded - Western N.C.

**United Way Retirees Association Endowment - Gordon Berg Founders Fund**

Established in 2002 in honor of Gordon Berg to maintain United Way programs.

**WTVI Public Television Endowment Fund**

Established in 1985 for the benefit of WTVI.

**The Harry and Jeanette Weinberg Endowment Fund for the Foundation of Shalom Park**

Established in 2003 for the ongoing maintenance and operation of the facilities and grounds of Shalom Park.

**Rachel E. Whittle Endowment Fund**

Established in 1993 for the benefit of the Saluda Nursing Center in Saluda, S.C.

**Charles R. Willard, Jr. Lecture Series Endowment Fund**

Established in 1978 by Mr. and Mrs. Charles R. Willard in memory of their son. The fund is used for the Charles R. Willard Jr. Lecture Series at the First Presbyterian Church, Charlotte N.C.

**Williamson Fund - ASC Unrestricted**

Established in 2002 by the Arts & Science Council as an unrestricted fund.

**Wing Haven Foundation Endowment Fund**

Established in 1980 for the benefit of the Wing Haven Foundation, which operates a bird and garden sanctuary in Charlotte.

**Billy Wireman Professorship at Queens University Fund**

Established in 1988 in honor of Billy Wireman, then president of Queens University.

### **World Team Endowment Fund**

Established in 1987 for the benefit of World Team to promote missionary outreach of churches in the U.S.

### **Lois M. Yandle Preservation Endowment Fund**

Established in 2000 for the benefit of the Public Library of Charlotte and Mecklenburg County. This endowment will fund efforts by the Library's local History and Genealogy department and its successors to preserve materials that document community history.

### **YMCA Blue Ridge Assembly Endowment Fund**

Established in 1986, this endowment is one of five under the will of William H. Barnhardt to provide annual income for the YMCA Blue Ridge Assembly in Black Mountain, N.C.

### **YMCA Endowment Fund**

Established in 1986, this endowment is one of five under the will of William H. Barnhardt to provide annual income for the YMCA of Greater Charlotte.

### **YMCA of Charlotte Endowment Fund**

Established in 1980 for the benefit of the Young Men's Christian Association of Greater Charlotte.

### **YWCA Endowment Fund**

Established in 1983 for the benefit of the Young Women's Christian Association of the Central Carolinas.

### **York County Environmental & Conservation Endowment Fund**

Established in 1999 by Rebecca and Harry Dalton to support environmental and conservation initiatives in York County, S.C.

### **York County Hospice Endowment Fund**

Established in 1991 for the benefit of York County, S.C. Hospice.

### **Eugenia Young Endowment Fund**

Established in 2000 for the benefit of the Cleveland County Memorial Library.

### **Youth Homes Endowment Fund**

Established in 1982 for the benefit of Youth Homes, which provides residential and other services to older youth with emotional or behavioral problems.

### **YouthNetwork Endowment Fund**

Established in 1999 for the benefit of YouthNetwork's youth shelters.

### **Sam and Emily Zimmern General Fund for Temple Beth El**

Established in 2004 to benefit Temple Beth El.

## **Field of Interest Funds**

**Benefit a broad category of need such as children's health, the arts or environmental causes**

### **African American Community Endowment Fund**

Established in 1994 to encourage and foster philanthropy to support nonprofit programs and organizations that address African American concerns, creating a legacy that will benefit future generations.

### **Bechtler Arts Endowment Fund**

Established in 1981 by Andreas H. Bechtler to provide support to major arts programs in the Charlotte area.

### **Belmont Area Endowment for the Homeless and Hungry Fund**

Established in 1991 by an anonymous donor to benefit charitable efforts in Belmont, N.C.

### **Gordon Berg Endowment Fund**

Established in 1977 by Charles R. and Ailene S. Harris. The endowment is unrestricted with emphasis on (1) the voluntary system of social work, (2) the field of child welfare and protective services, and (3) social planning for the community as a whole.

### **Henry and Daisy Bridges Earth Lecture Series Fund**

Established in 1999 to provide perpetual funding for programs that increase dialogue about our planet and inform others of concerns about its ecology.

### **Cabarrus County Community Foundation Endowment Fund**

Established in 1989 with a \$50,000 gift by the Cannon Foundation.

### **Carolinas Cancer Research Endowment Fund**

Established in 1985 by William H. Van Every Jr. for the purpose of medical research into the causes, detection, treatment and cure of cancer and for the purpose of educating and stimulating further cancer research by physicians and medical centers in the Carolinas.

### **Cherokee County Community Foundation Endowment Fund**

Established with a \$100,000 gift from the Fullerton Foundation.

### **Children's Medical Endowment Fund**

Established in 1979 to assist with the medical needs of children (ages 17 and under) which may be beyond their families' means to meet.

### **Cleveland County Community Foundation Endowment Fund**

Established in 1985 with an inaugural gift by George Blanton.

### **Joanne C. and Charles T. Davidson Endowment For The Greater Enrichment Program**

Established in 2000 for the benefit of the Greater Enrichment Program.

### **Durwood Medical Clinic Endowment Fund**

Established in 1979 for medically-related purposes.

### **Mr. and Mrs. Edward R. Fatzinger Endowment Fund**

Established in 1983 in memory of Mr. Edward R. Fatzinger for cancer research.

### **Fire Museum Endowment Fund**

Established in 1982 for the following purposes: (1) teaching fire safety, (2) honoring firefighters injured or killed in action, and (3) preserving the heritage of firefighting in this community.

### **Carrie Marshall and Peter S. Gilchrist, Jr. Fund**

Established in 1993 as an unrestricted endowment with a special interest in helping the indigent, colleges and schools, hospitals and health centers.

### **Charles R. and Ailene S. Harris Endowment Fund**

Established in 1977 as an unrestricted fund with special interest in youth, education and teen pregnancy. The fund also provides scholarships in engineering at the University of North Carolina at Charlotte.

### **Judge D.E. and Mattie J. Henderson Endowment Fund**

Established in memory of Judge D. E. and Mattie J. Henderson for the purpose of providing aid and assistance to abused women and children of the Charlotte-Mecklenburg area.

### **Lethia Jones Henderson Endowment Fund**

Established in 1981 by the transfer to the Foundation of the trust created by the will of Lethia Jones Henderson. This is an unrestricted fund in the field of health and community service with emphasis on service to minority groups.

### **Don S. Holt Memorial Endowment Fund**

Established in 1982 in memory of Don S. Holt for the purpose of education and research in the renal field.

### **E. F. Hutton Endowment Fund**

Established in 1979 to be used for crippled children (under 18) of North Carolina in need of braces, corrective shoes, wheelchairs and other orthopedic appliances.

### **Impact Fund for Emerging Philanthropists Endowment Fund**

Established in 2000 to ensure the long-term strength of The Impact Fund, a program to engage young regional leaders in an educational experience which encourages responsible philanthropy and funds innovative projects.

### **Keeter Fund for the Indigent**

Established in 2004 to benefit programs to support indigent citizens residing in Cleveland County.

### **Lexington Area Community Foundation Endowment Fund**

Established in 1997 with a gift in memory of Casper and Ella Timberlake.

### **Lincoln County Community Foundation Endowment**

Established in 2001 with an inaugural gift of \$300,000 made by First Charter to benefit Christian Ministries.

### **Dottie Martin Children's Endowment Fund**

Established in 1993 to honor and recognize Dottie Martin for her work with children as the First Lady of North Carolina.

### **Imago Mundi Endowment Fund**

Established in 1990 for research in the field of the comparative history of science.

### **Col. Erickson S. and Madeline H. Nichols Endowment Fund**

Established in 1983 in memory of Madeline Hechenbleikner Nichols for cancer research.

### **Lenora Stein Fund for Community Creative Learning**

Established in 2004 to fund creative learning opportunities within Charlotte's Jewish community.

### **Union County Community Foundation Endowment Fund**

Established in 1989 with a gift from Thomas Dillon.

### **Viola and Dorothy Wister Foundation**

Established in 1983 in memory of Viola F. Wister and Dorothy M. Wister for the purposes of cancer research and treatment, and the comfort of cancer patients.

## **Scholarship Funds**

### **Assist deserving students based on criteria that you recommend**

#### **Nancy "Nan" N. Abell Scholarship Endowment Fund**

Established in 1991 to honor Nan Abell, a teacher in the Charlotte-Mecklenburg School System for 45 years, by one of her former students, H. R. McCrorie. The fund provides an annual scholarship to a senior at Garinger High School.

#### **Herb Adrian Memorial Scholarship Endowment Fund**

Established in 1990 in memory of Herb Adrian by the Charlotte Apartment Association for scholarships in the multi-family housing field.

#### **William Tasse Alexander Scholarship Fund**

Established in 1983 to provide merit scholarships to Mecklenburg County, N.C. residents for undergraduate studies primarily in the field of education. This fund was established through the will of Margery Alexander Thompson, a Charlotte-Mecklenburg teacher, in memory of her parents and grandparents.

#### **Bank of America Junior Achievement Scholarship Fund**

Established in 1999 to provide scholarships to students in the Atlanta area with an interest in business through service to Junior Achievement.

#### **Pete and Ellen Bensley Memorial Scholarship Fund**

Established in 1998 by Brandon Bensley in memory of her parents, this fund provides an annual college scholarship to a graduating senior at East Mecklenburg High School.

#### **The Donald H. Bernstein and John B. Talbert, Jr. Scholarship Fund**

Established in 1999, the Donald H. Bernstein & John B. Talbert Jr. Scholarship Fund provides undergraduate college scholarships to students who are children of employees of Hanes Companies, Inc., USA.

#### **Mr. and Mrs. James H. Black Voice of Democracy Fund**

Established in 1987 to provide an annual scholarship to the North Carolina winner of the Voice of Democracy essay contest sponsored by the Veterans of Foreign Wars.

#### **T. Frank Booth Memorial Scholarship Endowment Fund**

Established in 1991 to provide undergraduate scholarships in accounting at East Carolina University.

#### **Elizabeth Leigh Brown Memorial Endowment Fund**

Established in 1992 to benefit broad charitable purposes.

#### **Thomas Kay Buchanan III Memorial Scholarship Fund**

Established in 2002 to provide scholarships to flight school for active cadets within the York County Composite Squadron of the Civil Air Patrol.

#### **Cadmus Communications Corporation Graphics Scholarship Endowment Fund**

Established in 1980 to provide scholarships to graphic arts students at Central Piedmont Community College.

#### **Julian E. Carnes Scholarship Endowment Fund**

Established in 1989 to provide scholarships to students preparing for a career in a technological field appropriate to meet the requirements of the U.S. Patent Office as a patent agent or attorney.

#### **Carolina Panthers Players Institutional Scholarship Fund**

Established in 2001 to provide undergraduate scholarships to fifth-year undergraduate students at UNC Charlotte who have participated in varsity athletics.

#### **Carolinas-Virginias Retail Hardware Scholarship Fund**

Established in 1995 to provide scholarships to children of employees of member firms of the Carolinas-Virginias region of the National Retail Hardware Association.

#### **Charlotte-Mecklenburg Emergency Services Scholarship Fund**

Established in 2004 to provide undergraduate scholarships to students seeking to meet the minimum educational requirements for employment in emergency services professions. This includes, but is not limited to, studies in emergency medical science, emergency medical technician (EMT) paramedics and firefighting services/fire science.

#### **Charlotte-Mecklenburg Schools Scholarship Fund**

Established in 1988 by a \$1 million anonymous gift to provide an incentive for students to graduate and pursue further education.

#### **Charlotte Rotary's 9-11 Scholarship Fund**

Established in 2003 to provide scholarships to the children of Charlotte area public safety personnel.

#### **Lula Faye Clegg Memorial Scholarship Endowment Fund**

Established in 1990 in honor of Lula Faye Clegg, a teacher in the Charlotte-Mecklenburg Schools for more than 40 years, by her former students. The fund provides scholarships in teaching at the University of North Carolina at Charlotte.



### **Consolidated High School of Jewish Scholarship Endowment Fund**

Established in 2001 for the benefit of tuition scholarships to the Consolidated High School of Jewish Studies.

### **Mary Stewart and William T. Covington, Jr. Scholarship Fund**

Established in 1999 to provide college scholarships for graduating seniors from Hoke County, N.C.

### **Judy Crocker Memorial Scholarship Fund**

Established in 1999 to provide undergraduate scholarships to Winthrop University students with an interest in education, human services and related majors.

### **Crowder Scholarship Fund**

Established in 1986 by O. P. and W. T. Crowder Sr. to provide college scholarships to children of employees of general contracting companies located in Mecklenburg County, with preference being given to children of employees of the Crowder Construction Company.

### **E. R. and Lillian B. Dimmette Scholarship Fund**

Established in 1990 to provide college scholarships to students from Gaston, Iredell, Mecklenburg, Rowan and Wilkes counties.

### **Charles and Dorothy Earp Scholarship Fund**

Established in 1997 to provide undergraduate scholarships to low-income students in the Charlotte-Mecklenburg Schools. Initially, this fund will award scholarships to recipients of the Charlotte Housing Authority Scholarship Fund and the Charlotte-Mecklenburg Schools Scholarship Incentive Fund.

### **Peter Hunt Fincher Scholarship Fund**

Established in 2002 to provide scholarships to students attending Charlotte Latin School.

### **Stuart and Martha Fishburne Endowment Fund**

Established in 1982, this fund provides the Howard B. Higgins South Carolina Dental Scholarship to students at the College of Dental Medicine at the Medical University of South Carolina.

### **Richard Goolsby Scholarship Fund**

Established in 1987 by William and Martha DeBrule of Forest City, N.C. in honor of Richard Goolsby, a pioneer in the field of plastics. The fund will provide scholarships to students who have shown a career interest in the plastics industry.

### **Wilbert and Zora Holmes Scholarship Endowment Fund**

Established in 2002 by Dylan and Danette Holmes to honor their parents. This fund provides an annual college scholarship to a graduating senior at York Comprehensive High School No. 1 in York, S.C.

### **James V. Johnson Scholarship Endowment Fund**

Established in 1997 for the benefit of the Iredell County Community Foundation, this fund provides scholarships to students at Pfeiffer University and Mitchell Community College.

### **Annabel Lambeth Jones Merit Scholarship Fund**

Established in 1980 for merit scholarships in Mrs. Jones' name at Queens University and Brevard College.

### **Lucille Finch Jones Endowment 1 Fund**

Established in 1979 for the Lucille Finch Jones Presidential Scholarship Program of Queens University.

### **Lucille Finch Jones Endowment 2 Fund**

Established in 1988 to provide scholarships for male students at Queens University.

### **Margaret H. Jones Scholarship Endowment Fund**

Established in 1987 by the will of Annie Lois Hyland in memory of her daughter, Margaret H. Jones. This endowment provides an annual college scholarship for a graduating senior at Myers Park High School.

### **Sarah Hall Jordan Scholarship Endowment Fund**

Established in 1992 to be distributed annually to the Thyatira Presbyterian Church in Rowan County, N.C. for the Sarah Hall Jordan Scholarship Program of the Church.

### **Mary and Millard Kiker Scholarship Fund**

Established in 1992 to provide scholarships on the basis of academics, character and need to students of Anson and Union counties.

### **Gail Elaine King Endowment Fund**

Established in 1985 to provide scholarships to Providence Day School.

### **Lamb Murnan Endowment Fund**

Established in 1997 for the benefit of the Charlotte Housing Authority Scholarship Fund to provide extra support to a deserving recipient of the Charlotte Housing Authority Scholarship Fund.

### **Law Enforcement Memorial Scholarship Endowment Fund**

Established in 1987 in memory of Charlotte Police Officer Robert L. Smith and all other officers slain in the line of duty. This fund awards scholarships to undergraduate students studying law enforcement at Central Piedmont Community College and the University of North Carolina at Charlotte.

### **Grayson Lea Memorial Scholarship Endowment Fund**

Established in 2000 to provide undergraduate scholarships to varsity soccer players graduating from Piedmont High School.

### **The Samuel Lerner Scholarship Endowment Fund**

Established in 2002 to provide scholarships to low-income students from Charlotte-Mecklenburg. The Fund provides additional funding to recipients of the Charlotte Housing Authority Scholarship Fund and the Communities in Schools of Charlotte-Mecklenburg ThinkCOLLEGE Scholarship Program.

### **Minority Professional Association Institutional Scholarship Fund**

Established in 2001, the fund provides undergraduate scholarships to high school seniors from North and South Carolina planning to pursue college majors in designated science and business-related fields.

### **Minority Scholarship Foundation Endowment Fund**

Established in 1995 to provide scholarships for minority students of the Rock Hill and Fort Mill school districts to enable them to attend a college or university.

### **Music Education Foundation of Southern Park Fund**

Established in 1994 to support music education for Mecklenburg County children.

### **North Carolina League for Nursing Academic Fund**

Established in 1989 to offer graduate scholarships in nursing and related fields.

### **Ted H. Ousley Scholarship Endowment Fund**

Established in 1993 as a memorial to Mr. Ousley by the North Mecklenburg Chamber. Annual college scholarships are awarded to seniors at North Mecklenburg High School.

### **Anne and Turner Page Family Endowment Fund**

Established in 1993 to provide secondary education scholarships at Cool Spring United Methodist Church.

### **Ed and Harriet Parris Education Student Scholarship Fund**

Established in 2002 to provide undergraduate scholarships to graduating seniors at Shelby High School who plan to pursue teaching careers.

### **Mary Lynn Phillips Dance Scholarship Endowment Fund**

Established in 1983 in memory of Mary Lynn Phillips to provide instructional scholarships to students of dance at Community School of the Arts on the basis of need and talent.

### **Henry DeWitt Plyler Scholarship Fund**

Established in 1989 to provide undergraduate scholarships for students from Lancaster County, S.C. attending Winthrop University.

### **Elizabeth S. Randolph Scholarship Fund of the Public Library of Charlotte and Mecklenburg County**

Established in 1999 for the benefit of the Charlotte-Mecklenburg Public Library.

### **Amy E. Ray Memorial Scholarship Endowment Fund**

Established in 1989 to provide an annual scholarship to a senior band student at Southpoint High School in Belmont, N.C.

### **Elizabeth Anne Reid Memorial Scholarship Fund**

Established in 2003 in memory of Elizabeth Anne Reid to provide scholarships to graduating seniors at Providence High School.

### **Ben Robinette Scholarship Fund**

Established in 1999 to provide scholarships to UNC - Chapel Hill in honor of Ben Robinette.

### **R. Stephen Ross Scholarship Endowment Fund**

Established in 2003 in memory of R. Stephen Ross to provide scholarships to students at Independence High School and David W. Butler High School who have provided exceptional service to their community.

### **Rotary Scholarship Endowment Fund**

Established in 1987 as a scholarship fund converted from a loan program. The fund was established by the Charlotte Rotary Club to provide scholarships for graduates of Central Piedmont Community College who wish to obtain a bachelor's degree from a four-year college in Mecklenburg County.

### **William Hensdale Shipp Memorial Scholarship Fund**

Established in 1998, this fund provides college scholarships to students who are members of Westminster Presbyterian Church or Progressive Baptist Church.

### **Tacy Anna Smith Memorial Scholarship Endowment Fund**

Established in 1996 to provide undergraduate college scholarships to graduating seniors at Providence High School.

### **Spirit Square Center for Arts and Education Fund**

Established in 1997 to provide undergraduate scholarships to college juniors and seniors from Mecklenburg and surrounding counties with an interest in the arts.

### **W. H. Stroud, Jr./Charlotte-Mecklenburg Fund**

Established in 1990 in memory of Charlotte Police Captain Wade H. Stroud, Jr. to provide scholarships in law enforcement at the University of North Carolina at Charlotte.

### **Swimming/Diving Scholarship Fund for Shelby High School**

Established in 1999 in memory of Maxine Miller Francis Forrest by her friends to provide undergraduate scholarships to Shelby High School students.

### **Whitten Crawford Tadlock Memorial Scholarship Endowment Fund**

Established in 2000 to provide undergraduate scholarships to Charlotte area high school tennis players.

### **Laramie Walden Memorial Endowment Fund**

Established in 1994 to provide scholarships to North Mecklenburg High School students interested in creative writing.

### **Matthew Tennyson Wanke Scholarship Endowment Fund**

Established in 1997 by Willis Carroon Corporation of North Carolina in memory of Matthew Tennyson Wanke. The Fund provides undergraduate scholarships to graduating seniors at Providence High School.

### **Westminster Scholarship Endowment Fund**

Established in 1996 to provide undergraduate college scholarships to students who are members of the First Presbyterian Church of Lancaster. Students may attend the college of their choice and pursue a course of study that will enable them to contribute to the welfare of human kind.

### **Loise and Leonard Whitesell Memorial Scholarship Endowment Fund**

Established in 2000 to provide scholarships to graduating seniors at Pinecrest High School in Southern Pines, N.C.

### **Fred C. Wikoff, Jr. Scholarship Fund**

Established in 1991 to provide scholarships to children of employees of Wikoff Color Corporation and its subsidiaries.

### **Wilmore Scholarship Endowment Fund**

Established in 1991 to provide college scholarships to students from the Wilmore Neighborhood of Charlotte.

### **Mary and Elliott Wood Foundation Scholarship Endowment Fund**

Established in 1998 to offer encouragement and comprehensive scholarships to the most gifted future leaders who have the capability, desire, energy, enthusiasm and determination to enhance and improve our civilization and quality of life – cultural, civic and ecological.

## **Unrestricted Funds**

**Benefit the community as a whole, either through community initiative efforts or for donor-specific areas of interest**

### **The Cole Foundation Endowment Fund**

Established in 1965 by Elizabeth S. Cole and her brother, Robert L. Cole for a broad range of charitable, educational, religious, literary and cultural purposes in Richmond County, N.C.

### **Julia H. Cuthbertson Endowment Fund**

Established in 1996 to assist with operations of Foundation For The Carolinas.

### **Foundation Endowment Fund for Grantmaking**

Established in 1979 to assist with the grantmaking of Foundation For The Carolinas.

### **Foundation Endowment Fund for Operations**

Established in 1980 to assist with operations of Foundation For The Carolinas. Throughout the years, numerous donors have contributed to this fund.

### **Lucille Puette Giles Endowment Fund**

Established in 1996 for broad charitable purposes benefiting the people of Mecklenburg County.

### **Wayne Howe Endowment Fund**

Established in 1998 to assist with operations of Foundation For The Carolinas.

### **Scott Macfarlan Memorial Endowment Fund**

Established in 1995 in memory of Scott Macfarlan for broad charitable purposes.

### **McMahon Memorial Endowment Fund**

Established in 1965 as an unrestricted fund through the will of Mrs. Philip McMahon. During her lifetime, Mrs. McMahon was interested in beautification projects, women's rights and social welfare.

### **Thomas H. and Jane B. Olson Endowment Fund**

Established in 1999 with broad charitable purposes.

## **Anonymous - 68 funds**

# summarized financial information

for years ended December 31

2004

2003

## Statement of Financial Position

### Assets

Cash and cash equivalents	\$7,723,476	\$25,600,108
Accounts receivable	4,315,281	7,763,062
Pledges receivable	4,504,673	6,123,579
Prepaid expenses	9,461	11,620
Short-term investments	66,614,671	55,202,444
Property and equipment, net	5,235,420	5,026,097
Notes receivable	250,000	250,000
Beneficial interest in trust	9,213	433,931
Long-term investments	<u>316,174,540</u>	<u>255,926,122</u>
<b>Total Assets</b>	<u><b>\$404,836,735</b></u>	<u><b>\$356,336,963</b></u>

### Liabilities And Net Assets

Liabilities	\$122,250,534	\$104,335,777
Net Assets	<u>282,586,201</u>	<u>252,001,186</u>
<b>Total Liabilities And Net Assets</b>	<u><b>\$404,836,735</b></u>	<u><b>\$356,336,963</b></u>

## Statement of Activities

### Revenues

Contributions	\$84,983,617	\$78,910,773
Less - contributions received on behalf of others	<u>(13,516,234)</u>	<u>(11,314,700)</u>
Net contributions	71,467,383	67,596,073
Other, Net	<u>15,621,917</u>	<u>28,321,842</u>
<b>Total revenues, gains and other support</b>	<b>\$87,089,300</b>	<b>\$95,917,915</b>

### Expenses

Grants	\$52,943,370	\$35,640,593
Less - grants disbursed on behalf of others	<u>(4,753,317)</u>	<u>(2,554,065)</u>
Net Grants	48,190,053	33,086,528
Operating Expenses	3,390,560	2,879,445
Other Expenses	<u>4,923,672</u>	<u>3,974,931</u>
<b>Total Expenses</b>	<u><b>\$56,504,285</b></u>	<u><b>\$39,940,904</b></u>
Change in net assets	\$30,585,015	\$55,977,011
Net Assets, Beginning Of Year	<u>252,001,186</u>	<u>196,024,175</u>
Net Assets, End Of Year	<u><b>\$282,586,201</b></u>	<u><b>\$252,001,186</b></u>

The audited financial statements of Foundation For The Carolinas are available for inspection at the office of Foundation For The Carolinas, 217 South Tryon Street, Charlotte, NC 28202.

Independent auditors: Cherry, Bekaert & Holland, L.L.P.

# dedicated leadership

2004

## Board of Directors

**Ruth G. Shaw, Ph.D.**, *Chair*  
Duke Energy Corporation

**Mark R. Bernstein**  
Parker Poe Adams & Bernstein

**James E. Burt III**  
First Charter Bank

**H.W. Close**  
Springs Foundation, Inc.

**Edward E. Crutchfield**  
Retired, First Union  
National Bank

**Algeania Freeman, Ph.D.**  
Livingstone College

**Harvey B. Gantt**  
Gantt Huberman Architects

**William H. Grigg**  
Retired, Duke Energy

**Hugh L. McColl Jr.**  
McColl Brothers Lockwood

**Thomas C. Nelson**  
National Gypsum Company

**Martha "Brownie" Plaster**  
Civic Leader

**Peter B. Ridder**  
The Charlotte Observer

**Sally Robinson**  
Civic Leader

**Lynne S. Safrit**  
North American Commercial  
Operations/Castle & Cooke

**Geraldine Sumter**  
Ferguson Stein Wallas Adkins  
Gresham & Sumter, PA

**James G. Whitton**  
Retired, Whitton  
Distributors, Inc.

2005

## Board of Directors

**Ruth G. Shaw, Ph.D.**, *Chair*  
Duke Energy Corporation

**Mark R. Bernstein**  
Parker Poe Adams & Bernstein

**James E. Burt III**  
First Charter Bank

**H.W. Close**  
Springs Foundation, Inc.

**Alan T. Dickson**  
Dickson Foundation

**Harvey B. Gantt**  
Gantt Huberman Architects

**William H. Grigg**  
Retired, Duke Energy

**Polly C. Jackson**  
Civic Leader

**Hugh L. McColl Jr.**  
McColl Brothers Lockwood

**Thomas C. Nelson**  
National Gypsum Company

**Martha "Brownie" Plaster**  
Civic Leader

**Peter B. Ridder**  
The Charlotte Observer

**Sally Robinson**  
Civic Leader

**Lynne S. Safrit**  
North American Commercial  
Operations/Castle & Cooke

**Geraldine Sumter**  
Ferguson Stein Wallas Adkins  
Gresham & Sumter, PA

**G. Kennedy Thompson**  
Wachovia Corporation

**James G. Whitton**  
Retired, Whitton  
Distributors, Inc.

2004 - 2005

## Executive Committee

**Ruth G. Shaw, Ph.D.**, *Chair*

**Peter B. Ridder**, *Past Chair*

**Harvey B. Gantt**, *Treasurer*

**Lynne S. Safrit**, *Audit  
Committee Chair/Secretary*

**Mark R. Bernstein**, *At Large*

**Thomas C. Nelson**, *At Large*

## Legal Advisor

**Herbert H. Browne Jr.**  
Helms Mulliss & Wicker PLLC

## 2004 - 2005 Board of Advisors

**James T. Staples**, *Chair*  
Iredell County  
Community Foundation

**Bernard N. Ackerman**  
York County  
Community Foundation

**Robert K. Folks**  
Lancaster County  
Community Foundation

**Larry D. Hamrick Sr.**  
Cleveland County  
Community Foundation

**Seth A. Haney**  
Lincoln County  
Community Foundation

**Margaret H. Kluttz**  
Salisbury Community  
Foundation, Inc.

**Robert F. Lowe**  
Lexington Area  
Community Foundation

**Sallie M. Lowrance**  
Charlotte Mecklenburg  
Community Foundation

**Charles L. Norwood**  
Union County  
Community Foundation

**Arthur H. Rogers Jr.**  
Stanly County  
Community Foundation

**Mark E. Shelley**  
Cabarrus County  
Community Foundation

**Dr. John S. Stevenson**  
Foundation For  
Richmond County

**John B. Travers**  
Cherokee County  
Community Foundation

**Ruth G. Shaw, Ph.D., Ex Officio**  
Foundation For The Carolinas

## 2004 - 2005 Investment Committee

**Thomas C. Nelson**, *Chair*  
National Gypsum Company

**Kathy Anderson**  
Civic Leader

**James E. Burt III**  
First Charter Bank

**Charles T. Davidson**  
Retired, J.A. Jones, Inc.

**W. Barnes Hauptfuhrer**  
Wachovia Corporation

**Harry Lerner**  
Lerner & Company Real Estate

**Stephanie S. Lynch**  
The Duke Endowment

# Foundation staff

## Executive Office

**Michael Marsicano, Ph.D.**

*CEO and President*

**Laura L. Meyer**

*Executive Vice President*

**Gretchen A. McLean-Bridges**

*Executive Assistant*

## Client Services

**Holly Welch Stubbing, J.D.**

*Senior Vice President,  
Client Services*

**Nicole K. DeVillers**

*Assistant Vice President,  
Client Services*

**Andrea C. Edwards**

*Assistant Vice President,  
Client Services*

**Fontella D. McKyer**

*Assistant Vice President,  
Client Services*

## Communications

**Charity L. Perkins**

*Vice President, Communications*

**Pamela Davis**

*Communications Specialist*

## Community Philanthropy

**Donald K. Jonas, Ph.D.**

*Senior Vice President,  
Community Philanthropy*

**Jenene H. Seymour**

*Senior Vice President,  
Scholarships*

**E. Bridget Ancil**

*Administrative Assistant,  
Community Philanthropy*

**Vicki L. Jones**

*Assistant Vice President,  
Community Philanthropy*

**Carla F. McCrorey**

*Administrative Assistant,  
Scholarships*

**Ryan Moses**

*Scholarship Specialist*

**M. Elaine Rhodes**

*Assistant Vice President,  
Community Philanthropy*

**Susan L. Stewart**

*Administrative Assistant,  
Community Philanthropy*

## Development and Planned Giving

**C. Barton Landess, J.D.**

*Senior Vice President,  
Development & Planned Giving*

**Cassandra Tydings, J.D., LL. M.**

*Vice President of Planned  
Giving, Foundation for the  
Arts & Sciences*

**Sue Worrel**

*Executive Director,  
Foundation for the Charlotte  
Jewish Community*

**Lynne P. Wooten**

*Administrative Assistant,  
Development & Client Services*

## Investments & Administration

**Judy L. Kerns**

*Senior Vice President,  
Investments & Administration*

**Kimberlie K. Coleman**

*Administrative Assistant*

**Karen U. Hurd**

*Investment Specialist*

**Sharon A. Laliberte**

*Office Manager*

**Warren J. McKee**

*Maintenance Specialist*

**Becky P. Taylor**

*Receptionist*

## Operations

**Debra S. Watt**

*Senior Vice President,  
Operations*

**Jill K. Blumenthal**

*Service Specialist*

**Alyssa R. Federico, CPA**

*Assistant Vice President,  
Operations*

**Lee E. Roseboro**

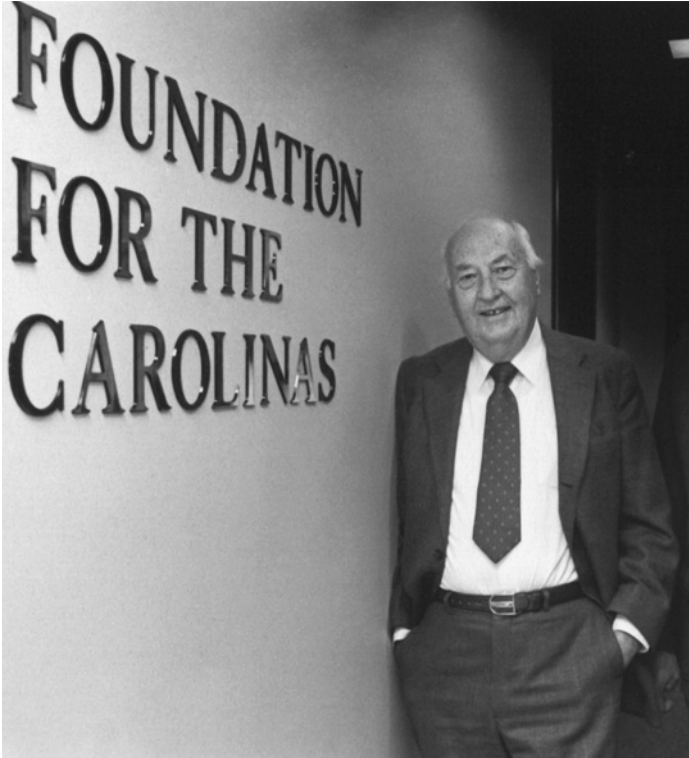
*Accounts Payable Specialist*

**Olivia R. Scott**

*Grants Processing Specialist*

# remembering gordon berg

Foundation For The Carolinas suffered a loss this year with the passing of Gordon Berg. Mr. Berg served as the executive director of the Foundation from 1978 to 1986. He passed away July 2, 2005 at the age of 92.



In a quiet and unassuming way, Mr. Berg dedicated his life to improving, enriching and impacting others' lives. A graduate of the University of Minnesota's School of Social Work, he began his career in St. Paul, Minn., establishing daycare centers throughout the city to help working women during World War II.

Mr. Berg is credited with inspiring the charitable spirit that defines our

region. He moved to Charlotte in 1955 to direct what is now the United Way of Central Carolinas. While serving as the executive director for 23 years, Mr. Berg turned the organization into one of the most successful United Ways in the southeast.

In 1958, under Mr. Berg's leadership, a gift of \$3,000 from the United Way helped to launch Foundation For The Carolinas. Upon retiring from the United Way in 1978, Mr. Berg became executive director of the Foundation. During his tenure, Foundation assets grew to more than \$20 million. His philosophy that "anyone can be a philanthropist" has encouraged individuals of all means to participate in building the Foundation into a permanent community resource for charitable needs.

Mr. Berg and his wife Dorothy were married for more than 50 years. Mrs. Berg also passed away this year on September 12 at the age of 96.

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Gordon Berg (shown here with his wife Dorothy) inspired many to give of their time, talent and resources to make their communities better places to live.



The  
**mission**  
of Foundation For The Carolinas  
is to **inspire**  
philanthropy and  
**strengthen**  
our region  
through innovative  
community initiatives  
and **quality**  
services to donors  
and constituents.



FOUNDATION FOR THE CAROLINAS

217 South Tryon Street • Charlotte, NC 28202

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(704) 973-4599 fax

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