

Your Quarterly Statement

Contact Us | 804-330-7400 Richmond | 804-436-1600 Gloucester—Mathews—River Counties

Your Q1 2019 Statement of Activity is now available on DonorConnect!

STRATEGIES FOR GIVING

BUNDLING YOUR CHARITABLE GIFTS

Now that tax season is over, are you wondering what you could do differently to maximize your charitable deduction next year? Learn about the value of “bundling” your charitable gifts using a donor advised fund and read about the experience of Community Foundation donor Bobby Thalhimer in [our latest blog post](#) by Molly Dean Bittner.



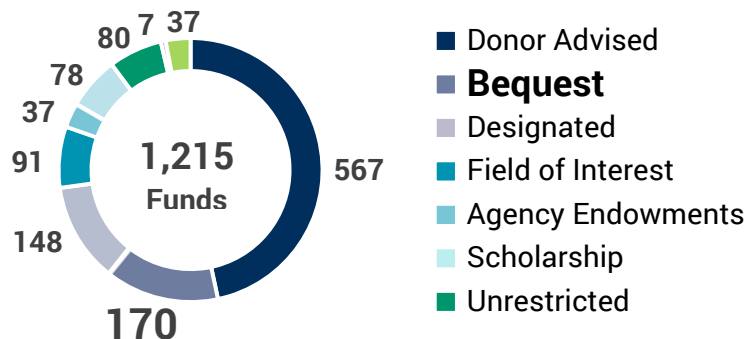
"I did not have a mental grasp on how many donations I was making outside my DAF until much later—when I turned my 2018 tax information over to my accountant last month. Whoa! I actually felt a stab of pain when I met with my accountant and faced the loss of these deductions."

- Bobby Thalhimer

PLAN FOR THE FUTURE OF YOUR FUND

What will your charitable legacy be? Donors have established 170 bequest funds to carry out their charitable legacy beyond their lifetime through a planned gift at the Community Foundation, or by designating their charitable fund as an estate beneficiary. This ensures the causes that mean so much to them during their lifetimes will continue to thrive for future generations. When you make a commitment to strengthen our community, today or in the future, it can be one of the most meaningful and lasting decisions you can make. Contact your Philanthropic Advisor to start the conversation.

Community Foundation Funds by Type (as of 12/31/18)

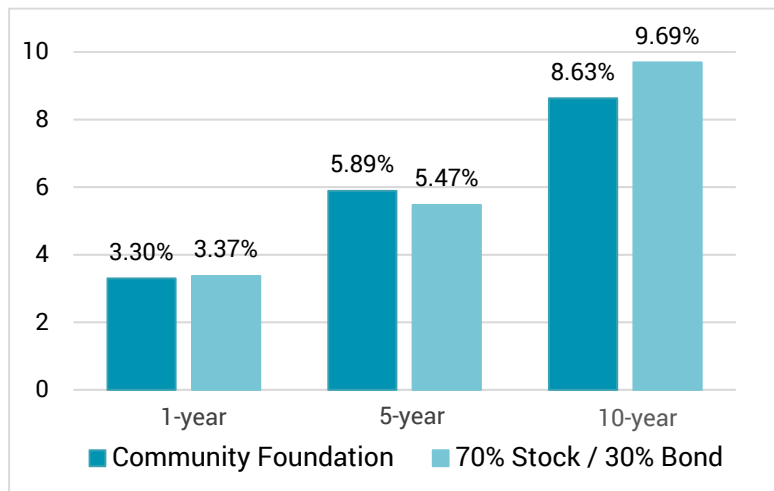


INVESTMENT UPDATE

SIGNATURE FUND UPDATE

The 1st quarter returns for charitable funds invested with Spider Management Company (SMC) were 5.15%. Our partnership with SMC is based on a shared understanding that future generations rely on these long-term assets. Spider Management Company's performance over the past decade of our partnership reflects the value of its disciplined and diversified investment strategy.

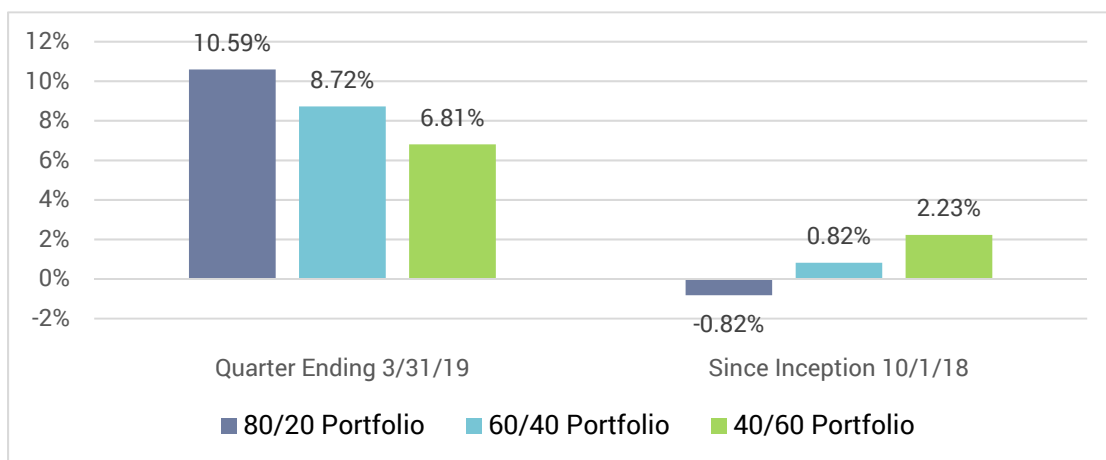
Investment Performance (as of 3/31/19)



INDEX POOL UPDATE

Please see the chart below for Vanguard's investment performance through 3/31/2019. These investment results have been applied to funds invested in Vanguard.

Investment Performance (as of 3/31/19)



If you would like to discuss your fund's investments, please contact your Philanthropic Advisor.

AFFILIATES UPDATE

2019 GRANTMAKING

The Mathews, Gloucester and River Counties Community Foundations have been reviewing grant proposals recently. The Mathews Community Foundation is awarding \$147,940 to 41 organizations, Gloucester is awarding \$43,381.75 to 16 organizations, and River Counties is still making final recommendations. To learn more about the grants that are being awarded in Mathews, Gloucester and River Counties, please contact [Brian Jenkins](#).

MATHEWS CELEBRATES 20 YEARS OF GIVING

Congratulations to the Mathews Community Foundation for 20 years of working hand-in-hand with donors and the local nonprofit community to keep Mathews County strong and vibrant. We look forward to your next 20 years of community impact!

FOUNDATION NEWS

FEATURED STAFF



Bre Johnson
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sjohnson@cfrichmond.org

We have recently made some changes to our Philanthropic Services team to better serve our donors. One of the most exciting changes is Bre Johnson, who has been with the Foundation for 20 years, has been named Donor Services Specialist. She will provide dedicated customer service to address your questions and concerns, such as:

- I need help logging onto DonorConnect.
- I need help making a grant recommendation to my favorite nonprofit.
- What is the balance of my fund?
- When did I last make a gift to my fund?

2019 COMMUNITY GRANT INVESTMENTS

In June, the Community Foundation board will finalize its annual community grant investments. This year, our team reviewed 115 nonprofit proposals, totaling \$5 million in funding requests – far exceeding the \$2 million available to support the greatest needs in our community. We are happy to share proposals or insights with you if you are interested in learning more about initiatives happening in the community.

Thank you to the donors who participated in “Giving Together,” a pilot program to bring donors’ voices into the Foundation’s funding considerations – this year, in consideration of arts and culture. This is an opportunity for donors to partner with us to extend the grantmaking dollars available. We look forward to expanding this program in the future.

Thank you for your partnership and please contact us anytime we can be of assistance in furthering your philanthropic impact.