MARTIN HALL:
“Charitable Tools that Benefit Donors, Owners, and Families”

MAY 10, 2022
As a premier national university, SMU shapes future leaders who transform communities and organizations through ingenuity and thoughtful problem-solving. The University’s deep ties with Texas continue to grow stronger, thanks to more than 86,000 alumni who make our state a better place in which to work and live. Building on its history of excellence, the University has launched **SMU Ignited: Boldly Shaping Tomorrow**, a multiyear $1.5 billion campaign to:

- **Empower outstanding students.**
- **Enrich teaching and research.**
- **Enhance our campus and community.**

To date, **SMU Ignited** has raised over $800 million toward its goals, thanks entirely to its generous donors and dedicated community members. Mustangs dare to dream big and do good, transforming their community, Texas and beyond for the better. We invite you to join us at the forefront of this latest stampede to ignite the bold, the curious and the creative.

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A Top 25 firm, our domestic and international teams are here to support your clients.

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On behalf of Communities Foundation of Texas and Southern Methodist University, thank you for joining us for our 2022 Professional Seminar.

We are excited to welcome you as we gather in-person after two years of virtual meetings to learn more about how we can best serve our clients, donors, and community.

As always, we are grateful for the unwavering support of our sponsors:

- Southern Methodist University, Presenting Sponsor
- Carter Financial Management; Frost Bank; Heritage Auctions; Holland & Knight; Meadows, Collier, Reed Cousins, Crouch & Ungerman, LLP; and Tolleson Wealth Management, Partner Sponsors
- Gray Reed & McGraw and Mercer Advisors | Quest Capital Management, Engagement Sponsors
- Annen Consulting; Armanino, L.L.P.; HighGround Advisors; and Island Wealth Strategies, Supporting Sponsors

Special thanks to our Professional Seminar Committee, chaired by Kathy Muldoon, whose members have done an outstanding job of providing their guidance and time to ensure an exceptional program.

We recognize the role of Trusted Advisor has become even more important, as North Texas continues to recover and return to normal. Our desire is that you consider CFT as a resource or an extension of your practice for your clients’ philanthropic needs.

CFT has a long history of supporting and partnering with professional advisors. We are honored to work with some of the best in the industry to support our community’s charitably minded individuals, families, and businesses. For 70 years, we’ve worked side by side with estate and tax attorneys, CPAs, wealth advisors, and financial planners to help guide and execute donors’ charitable interests and plans.

These trusted partnerships with advisors and their clients have helped to grow community giving across North Texas and beyond.

Through the difficult challenges of the last two years, what has accelerated our ability to learn, adapt, and respond has been working side by side with you, our donors, nonprofits, and our community stakeholders. When we align towards shared goals and helping others, we are truly more impactful.

We are inspired by the generosity of our individual CFT fund holders, and by the work that you do to support their goals as trusted advisors. As your philanthropic partner, we are here to provide the charitable tools and resources needed to advance your client’s knowledge and make their gifting meaningful and effective. We look forward to working side by side with you and your clients for years to come.

David J. Scullin
President and CEO
Communities Foundation of Texas
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Gray Reed attorneys, many of whom are Board Certified in Estate Planning and Probate by the Texas Board of Legal Specialization, have advanced law degrees in taxation or are CPAs, provide experienced legal counsel on all matters related to trusts and estates including:

- Tax-efficient estate planning, including charitable gift planning
- Administration of trusts and estates
- Litigation involving wills, trusts, charitable gifts, fiduciary misconduct and other inheritance disputes

Our trusts and estates team works synergistically with the firm’s other attorneys in such areas as family law, tax, oil and gas, M&A and real estate to make sure each client’s legal needs are met comprehensively.

After all, our clients aren’t just clients. They are part of the Gray Reed family. Your goals are our goals, your industry is our industry, and your legacy is our legacy.
AGENDA

“Charitable Tools that Benefit Donors, Owners, and Families”
Tuesday, May 10, 2022

8:15 am  Welcome
Carolyn A. Newham, J.D.
Senior Director of Donor Relations and Services Communities Foundation of Texas

Remarks
Brad Cheves, Vice President for Development and External Affairs, SMU
Dave Scullin, President and CEO, Communities Foundation of Texas
–Presentation of the Vester Hughes Award video honoring John Bergner

8:30 am  Introduction of Speaker
Carolyn A. Newham, J.D.
Senior Director of Donor Relations and Services Communities Foundation of Texas

8:35 am  Martin Hall, Ropes & Gray LLP

9:35 am  Break

9:45 am  Martin Hall, Ropes & Gray LLP

10:50 am  Closing Remarks and Adjourn
Carolyn A. Newham, J.D.
Senior Director of Donor Relations and Services Communities Foundation of Texas

11:00 am  Adjourn

CE Credits: CFP/CPE/MCLE 2.0 hour credit
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Kathy Muldoon, Chair  
*Carter Financial Management*

“What an excellent resource Communities Foundation is for our community! We have found that our clients are quite comfortable that their charitable dollars are not just well custodied but that they have an able research partner to help with the choices of grant recipients, as well as tax-efficient gifting strategies.”

Edward A. Copley  
*The Blum Firm*

“CFT is a valuable resource for my clients. CFT has broad experience in helping create and implement philanthropic strategies and programs. It is a pleasure to work with its leadership and staff. The CFT seminars are very instructive for the professional community.”

Alan K. Davis  
*Meadows, Collier, Reed, Cousins, Crouch & Ungerman, LLP*

“CFT is a tremendous resource. Professionals can rely on CFT to work towards solutions for their clients and provide the resources to accomplish their objectives. Clients can rely on the professionals at CFT to help design and implement philanthropic plans that enhance their specific charitable objectives. I recommend CFT because of their resources, commitment and people.”

Tim Aronson  
*SMU*

“Community foundations play such an important role in the cities and regions they serve, and CFT is absolutely best in class through its work and mission in Dallas, North Texas and beyond. SMU is proud of our long-standing partnership with CFT to host this important professional advisors seminar.”

Kendall R. Holden  
*Calvetti Ferguson*

“CFT is a great resource to my clients as they seek to maximize their gifts to the Dallas community. The staff is always professional and technically qualified. CFT provides a wonderful experience as they assist me and my clients.”
**Susan Jenevein**  
*Tolleson Wealth Management*  
“As long time supporters of the CFT Professional Seminar, we at Tolleson Wealth Management have seen how important the seminar is to Dallas’ best planning professionals. We are honored to be a part of this effort to support excellence in legal, tax, estate and philanthropic planning services.”

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**Jonathan March**  
*Armanino*  
“Communities Foundation of Texas provides a collaborative environment that connects philanthropists, professionals, and nonprofit organizations needing resources in the North Texas community. My clients enjoy utilizing CFT’s resources to more connect with their North Texas community and create a better world.”

---

**Steve Maus**  
*The Nautilus Group*  
“CFT is a great collaborative ally to advisors in the Metroplex across all the estate and charitable planning disciplines. They help focus on the ‘why’ a philanthropic plan is implemented rather than just ‘where and how.’”

---

**Norman A. Lofgren, Chair**  
*Gray Reed & McGraw, PC*  
“CFT has been a wonderful planning partner for me and an exceptional charitable outlet for clients of mine who have charitable interests. The CFT staff is both professionally knowledgeable and ‘user friendly.’ They have assisted me in implementing tax advantageous structures while simultaneously helping my client families that are working to refine and define their philanthropic goals.”

---

**James V. Roberts**  
*Glast, Phillips & Murray, PC*  
“Communities Foundation of Texas is a true gem in the Dallas estate planning community. Studies demonstrate repeatedly that many clients want to discuss charitable giving in the first meeting with their professional advisors, but many clients are uncertain about how to proceed. CFT makes it easy for everyone involved.”
MARTIN HALL joined Ropes & Gray LLP in 1986. He is a partner of the firm and has been the Chair of its Private Client Group since 2006. He holds law degrees from Cambridge University in England (M.A., First Class Honors, 1981) and Boston University School of Law (J.D., summa cum laude, 1986). He was a visiting fellow and lecturer in law at the University of Chicago Law School in 1982-83.

Martin’s practice is concentrated in the areas of wealth management, estate planning, trust and estate administration, and charitable giving. He is a member of the American Bar Association (Tax Section) and was Chair of the Tax Section’s Estate and Gift Taxes Committee from 2008 until 2010. He is also a fellow of the American College of Trust and Estate Counsel (ACTEC) and was the Chair of ACTEC’s Charitable Planning and Exempt Organizations Committee from 2010 until 2013 and the President of the ACTEC Foundation from 2014 until 2017. Martin was the Chair of the New England Estate Planning Conference (organized by Massachusetts Continuing Legal Education) from 2007 through 2012. Martin was a founding member of the Professional Advisors Committee to The Boston Foundation and served as the Committee’s initial Chair from 2000-2008. In 2020, The Planned Giving Group of New England awarded Martin the David M. Donaldson Distinguished Service Award for his “outstanding service and leadership in the field of charitable gift planning”.

Martin is a co-author of The Harvard Manual on the Tax Aspects of Charitable Giving (9th ed. 2011) and of Practical Guide to Estate Planning (CCH 2021). Martin is a frequent speaker at national and local charitable giving and estate planning programs and has been quoted on various charitable tax matters in The Wall Street Journal.
PROGRAM FEE: $1,000

BENEFITS:
(include but are not limited to)

- Recognized by prospective employees, vendors, clients, peer organizations, and others as a company that supports the future prosperity of our community
- CFT for Business Be In Good Company Seal of Excellence to be displayed publicly both physically and digitally during each year of successful participation
- Recognition announced via Communities Foundation of Texas’ social media networks
- Inclusion in D CEO magazine special section with discounted rates, including ads in D CEO magazine throughout the year

See the full list of benefits at: CFTEXAS.ORG/GOODCOMPANY#BENEFITS

Communities Foundation of Texas for Business (CFT4B) believes that a thriving team creates a thriving culture, which helps ensure a thriving future for all. Our Be In Good Company program recognizes companies that make a difference in the North Texas community and exhibit at least one program or initiative in each of our three pillars of excellence:

Thriving Team | Thriving Culture | Thriving Future

Join CFT4B’s Be in Good Company program so we can shine a spotlight on all the good you’re doing in the community! Visit CFTEXAS.ORG/GOODCOMPANY to learn more and join the movement to make North Texas the most business-engaged community in the country.

QUESTIONS?
To learn more about Be In Good Company or the Engagement Network, contact:
JJ Ponce, Director, CFT for Business | jponce@cf texas.org | 214-750-4111
Through our Engagement Network, CFT for Business organizes volunteer events, educational and professional development workshops, and affinity group networking events. We also offer strategic philanthropic services:

- Strategic philanthropic consulting that aligns with your company’s core values
- Nonprofit partnership development
- Access to group volunteer opportunities
- Customized solutions to meet your business goals
- Grantmaking opportunities for employees

CFT for Business partners with companies of all sizes to help start or grow a business’s giving and community engagement programs.

**PROGRAM FEE:** $5,000–$25,000

**BENEFITS:**
(include but are not limited to)

- Philanthropic consulting and strategy development
- Community engagement opportunities customized to your business values and goals
- Demonstrate inclusive culture through custom programming reflecting employee input, passion, and values
- Improve employee engagement and retention

Contact us today at business@cftexas.org to join good corporate citizens across North Texas to build a thriving community for all!

QUESTIONS?
To learn more about Be In Good Company or the Engagement Network, contact: JJ Ponce, Director, CFT for Business | jponce@cftexas.org | 214-750-4111
“THERE IS NO FINISH LINE”

• A strategic and best practices approach to financial planning and wealth management
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Holland & Knight is proud to support the

Communities Foundation of Texas

and the 2022 CFT/SMU Professional Seminar.

We applaud CFT’s efforts to work side by side with caring donors, committed nonprofits, philanthropy-focused businesses and civic leaders to help build communities that thrive for all.

Holland & Knight
www.hklaw.com
Dallas, TX | 214.964.9500
WHAT WE DO
Since 1953, Communities Foundation of Texas has grown to become one of the nation’s largest community foundations. Our strategic goals are to: grow community giving, advance community equity, and expand community impact. We represent our donors’ charitable interests and add value through our wealth of community knowledge, along with the leadership of our volunteer board of trustees and the expertise of a professional staff. CFT is committed to serving and understanding donor needs, expertly handling complex gifts, wisely managing charitable funds, and leveraging community knowledge. CFT serves as a hub for collaboration between philanthropists, nonprofits, and other funding organizations across the community.

VALUES
Enhancing the experience and impact of giving through:
1. Exemplary service
2. Wise stewardship of resources
3. Trusted community knowledge

TYPES OF FUNDS
- **Donor-advised funds** allow donors to remain actively involved in the grantmaking process.
- **Business-advised funds** support companies’ philanthropic goals with a full spectrum of services, including grantmaking, due diligence, site visits, and community updates.
- **Designated funds** benefit a specific charitable organization.
- **Community impact** and **field-of-interest funds** trust CFT to use its discretion to award grants to local nonprofits meeting current, pressing community needs.
- **Scholarship funds** benefit students pursuing their academic dreams.
- **Supporting organization funds** are similar to donor-advised funds, but are legally separate tax-exempt entities from CFT, which offer more opportunities for donor involvement with grants and investments.
- **Nonprofit funds** allow nonprofits to benefit from CFT’s investment expertise.

FINANCIALS
FISCAL YEAR ENDING June 30, 2021
Total Assets: $1.5 billion
Total Grants Paid: $137 million
Total Gifts Received: $144 million
Number of Funds: 1,200+

CUMULATIVE GRANTS
$2.2 billion+

ASSETS 2007-2021

| 2021 COMPOSITION OF ASSETS (in millions, unaudited) |
|---------------------------------|--------|
| W.W. Caruth, Jr. Foundation     | 545    |
| Donor-Advised Funds             | 476    |
| Discretionary Funds             | 176    |
| Designated Funds                | 133    |
| Nonprofit Agency Funds          | 71     |
| Other Supporting Organizations  | 38     |
| Scholarship Funds               | 33     |
| General Operating Funds         | 26     |
| Charitable Remainder Trusts     | 7      |
| **TOTAL ASSETS**                | **$1,505** |
Representative Grants

D-TRHT’s Racial Equity NOW
Grant Amount: $305,000
In 2016, the W.K. Kellogg Foundation launched a national effort to engage communities across the country in racial healing and change efforts via a Truth, Racial Healing and Transformation (TRHT) process.

Project Unity’s Together We Learn (TWL)
Grant Amount: $475,000
Project Unity developed the Together We Learn (TWL) program out of the belief that the way to heal police-community tensions is through mutual understanding and empathy. TWL brings police officers into schools to reenact traffic stop and other temporary detention scenarios.

Trust for Public Land’s Alice Branch Creek Park
Grant Amount: $500,000
TPL will break ground on the park in July 2020 and expects to complete the project in early 2021, providing a quality park and greenbelt for the benefit and enjoyment of the approximately 7,000 residents and 1,300 students of the South Oak Cliff community who live within a 10-minute walk of the park.

Key Initiatives

Educate Texas
Educate Texas is an innovative alliance of public and private groups that share a common goal: improving the public education system so that every Texas student is prepared for success in school, in the workforce and in life. Launched in 2004 as the Texas High School Project, Educate Texas has made a positive impact on the lives of hundreds of thousands of low-income or underserved students in low-performing schools throughout Texas.

CFT for Business (CFT4B)
For more than a decade, CFT has been facilitating community involvement and philanthropy for companies of all sizes who want to make a beneficial impact on their communities through grantmaking, volunteerism, in-kind donations and pro-bono services. Through CFT for Business, we have the tools and resources to help your business build a thriving company culture of stewardship, service and generosity that meets business objectives.

Emerging Leaders in Philanthropy
CFT’s Emerging Leaders in Philanthropy (ELP) program seeks to educate, engage, and broaden the philanthropic impact of the next generation of leaders in North Texas to ensure that our region’s legacy of generosity continues to thrive and grow. We hope that young professionals with a mind and heart for their community can learn to set their personal strategies for giving, have a deeper understanding of how to approach philanthropic issues, and connect with others who have a diverse background but share a commitment to be engaged.

CFT’s NTX Giving Day
Launched in 2009 by CFT, NTX Giving Day is the largest communitywide giving event in the nation. Since its inception, this online event has transformed from an idea to help local people give wisely, to a movement that has ignited a broad culture of giving. During the 2021 event, $66 million was raised for 3,300 North Texas nonprofits, bringing the 13-year total to more than $441 million.

Economic Security for Low-Income Families
CFT seeks to improve the economic security of working families in the North Texas area by: 1) promoting community understanding of the current issues and challenges facing low-income and working families; 2) convening, equipping and aligning service providers; and 3) investing in programs and services that enable families and individuals to achieve and sustain economic security.
For donors with a commitment to achieve their philanthropic north star and create a thriving community for all

WHAT WE OFFER:

- Dedicated philanthropic advisors who provide extensive community knowledge
- Charitable giving options that meet your needs for today and in the future
- Customized legacy planning
- Flexible grantmaking
- Freedom from accounting management and tax filings
- Ability to keep your current investment manager

FOR AN ADDITIONAL FEE:

- Unique, customized grant application process
- Personalized webpage with custom URL and logo

WHY CHOOSE CFT OVER A PRIVATE FOUNDATION?

CHARITABLE CONCIERGE
Dedicated relationship manager to serve as your charitable concierge to ensure highest level of service.

GOVERNANCE
Options for the governance structure of your fund to meet your needs. We can help facilitate meetings, structure family discussions, set an advisory board, or you can work independently.

NO START-UP COSTS
Charitable donation that is fully grantable, $0 to create and customize governing documents and open fund.

CUSTOMIZED GRANTMAKING
Tailored research, identification, and vetting of nonprofits, including multi-year commitments and nonprofit reporting.

BETTER TAX BENEFITS
Benefits include higher immediate tax benefits and no net investment income tax.

NO ANNUAL CHARITABLE PAYOUT
No annual required amount to grant.

PRIVACY
Donor decides, grant by grant, how much information to share with recipients.

CUSTOMIZED PHILANTHROPIC ADVISING
Information on thousands of charities and all required due diligence available without additional costs of an employee or contractor.

Questions? Contact our expert:

CAROLYN A. NEWHAM, J.D.
Senior Director of Donor Relations and Services
cnewham@cftexas.org | 214-750-4146
CFT’s team of experts specialize in providing grant services to individuals, families, private foundations, corporate foundations, and businesses for various levels of charitable giving. Our team will work with you to identify your giving style and passions, as well as formulate a giving strategy that aligns with the causes and issue areas you care about most.

SERVICES WE OFFER:

1. Build your strategy
Refine your philanthropic objectives through CFT’s GiveWisely® program

2. Find the best nonprofits
Leverage CFT’s network of 3,000+ area nonprofits to find grant opportunities that align best with your grantmaking strategy. Specifically, CFT can:
   - Develop customized lists of grant opportunities
   - Provide financial reviews of nonprofits of interest

3. Measure progress
Monitor the effectiveness of grants through periodic grant report reviews. Specifically, CFT can:
   - Coordinate site visits to build stronger knowledge of nonprofits
   - Collect and review grant performance reports to better understand progress toward key goals

FOR AN ADDITIONAL FEE:

CFT can design and implement customized grantmaking strategies for clients that have very specific needs. Services include:

- Designing or updating grant guidelines, grant applications, and grant evaluations
- Hosting customized application processes on CFTs online grantmaking platform
- Reviewing grant applications and developing grant recommendations
- Coordinating nonprofit evaluations so client can better understand the impact of grants

“The value that CFT brings is in working with so many nonprofits closely. We’re able to align with the goals of donors and recommend vetted nonprofits that are best positioned to do specific types of work and make an impact long-term.”

- GALEN SMITH, CFT’S SENIOR COMMUNITY PHILANTHROPY OFFICER

Questions? Contact our expert:

GALEN SMITH
Senior Community Philanthropy Officer
gsmith@cftexas.org | 214-346-5525

Learn more about the benefits of CFT’s philanthropic advising services by scanning the QR code.

CFT’s current philanthropic advising partnerships include:

The Dallas Morning News  Constantin Foundation  Cotton Bowl AC Heisman Trophy

SCAN ME
THE EXPERTS

CFT Philanthropic Services Team

Monica Christopher  
SVP, Chief Giving and Community Impact Officer  
214-750-4135  
meget@cftexas.org

Carolyn A. Newham, J.D.  
Sr. Director of Donor Relations and Services  
214-750-4146  
cnewham@cftexas.org

Amelia White  
Director of Donor Engagement  
214-346-5507  
awhite@cftexas.org

Melissa Hardage  
Director of Donor Initiatives  
214-750-4251  
mhardage@cftexas.org

Elizabeth Liser, CAP®  
Senior Donor Engagement Specialist  
214-750-4234  
eliser@cftexas.org

Katie Kuehl  
Scholarships and Philanthropy Officer  
214-750-4137  
kkuell@cftexas.org

Boski Sharma, CAP®  
Donor Relations Officer  
214-346-4128  
bsharma@cftexas.org

Morgan Spann  
Donor Relations Officer  
214.750.4107  
mspann@cftexas.org

Jeri Chambers  
Senior Officer of Donor Engagement, Collin County  
214-750-4117  
jchambers@cftexas.org

Laura Payne  
Donor Services and Scholarships Coordinator  
214-346-5511  
lpayne@cftexas.org

CFT for Business Team

JJ Ponce  
CFT for Business, Director  
214-750-4111  
jponce@cftexas.org

Kymberlaine Banks  
Business Engagement Officer  
214-346-5509  
kbanks@cftexas.org

Jenna-Wade Fowler  
Business Engagement Associate  
214-346-5501  
jfowler@cftexas.org
CFT’s funds and underlying assets are governed by an independent board of trustees, composed of respected community leaders from diverse backgrounds. They are selected for their knowledge of and commitment to community needs and for their professional expertise. The trustees’ charge is to understand donors’ interests and the roles of nonprofits, acting as stewards of more than 1,200 funds. Trustees serve without compensation and exercise the final authority with regard to all CFT investments and charitable grants.
YOUR COLLECTION.
YOUR LEGACY.

Every collection is unique and every collector has a story to tell. At Heritage Auctions, it is our mission to provide each client and their advisor with customized estate planning and valuation services designed to help further their legacy.

In 2021, Heritage reached a remarkable milestone, achieving annual sales of more than $1.4 billion. Headquartered in Dallas, Heritage is a proud ambassador of the Texas spirit of entrepreneurship and innovation through its locations across the United States and around the globe. Heritage has grown over the decades from a numismatics-focused auction house to now offering unparalleled expertise in more than 40 collecting categories.

The Trusts & Estates department at Heritage® assists professional advisors with complimentary on-site or virtual estate consultations, sales proposals for auction, private sale opportunities, and collection advisory services.

Heritage Auctions Appraisal Services, Inc., offers an experienced team of qualified appraisers who produce IRS-compliant formal reports that follow the guidelines set forth by the Uniform Standards of Professional Appraisal Practice (USPAP). Our meticulously researched and detailed reports will not only meet, but exceed your expectations.

INQUIRIES:
Michelle Castro | Director, Trusts & Estates | Dallas
214.409.1824 | MichelleC@HA.com

Carol Lee Pryor | Director, Appraisals | Dallas
214.409.1138 | CarolLeeP@HA.com
We create strong alliances with clients and their existing advisors to solve complex tax and business issues.

The firm has been providing business, tax and regulatory solutions to individuals and corporate clients since 1983. Our attorneys provide services in the following practice areas:

- Estate and Gift Tax Litigation
- Estate Planning and Probate
- Income Tax Litigation
- Income Tax and Business Planning
- State Planning and Litigation
- White Collar and Government Regulatory Litigation
- Real Estate
- Corporate
- Commercial

Meadows Collier

ATTORNEYS AT LAW

MEADOWS, COLLIER, REED, COUSINS, CROUCH & UNGERMAN, LLP.

901 Main Street, Suite 3700 Dallas, Texas 75202 phone (214) 744-3700 (800) 451-0093

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You know your clients.
We know philanthropy.

Side by side, we can ensure your clients’ giving thrives in Texas, across the country and beyond. We’re here to help you and your clients achieve their charitable goals.

Learn more at CFTEXAS.ORG/ADVISORS