With your help, 2018-2019 was another record fiscal year. Since 2008, the Community Foundation has raised more than $130 million in contributions, and together with our generous clients, has distributed more than $60 million in grants to charities in Indian River County and around the world. Thank you for taking time to learn about our progress toward achieving our mission of “building a better community through donor-driven philanthropy.”

Rebecca F. Emmons
Chairwoman

Jeffrey R. Pickering
President & CEO

A YEAR OF GROWTH AND PROGRESS

$66M
ASSETS

168
FUNDS

$62M
GRANTS $ SINCE INCEPTION

7,504
GRANTS # SINCE INCEPTION

ORGANIZATIONS RECEIVING GRANTS

- Animals = 2%
- Arts, Culture and Humanities = 6%
- Children and Youth = 4%
- Education = 20%
- Environment = 17%
- Health = 14%
- Human Services = 14%
- Public, Societal Benefit = 20%
- Religious Related = 3%
## Financial Summary

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>June 30, 2019</th>
<th>June 30, 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Investments</td>
<td>$68,218,000</td>
<td>$45,323,000</td>
</tr>
<tr>
<td>Pledges Receivable, Founders</td>
<td>$132,000</td>
<td>$158,000</td>
</tr>
<tr>
<td>Other</td>
<td>$59,000</td>
<td>$85,000</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$68,409,000</strong></td>
<td><strong>$45,566,000</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES &amp; NET ASSETS</th>
<th>June 30, 2019</th>
<th>June 30, 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants declared and not yet paid</td>
<td>$990,000</td>
<td>$1,870,000</td>
</tr>
<tr>
<td>Other</td>
<td>$1,230,000</td>
<td>$828,000</td>
</tr>
<tr>
<td>Net Assets</td>
<td>$66,189,000</td>
<td>$42,868,000</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES &amp; NET ASSETS</strong></td>
<td><strong>$68,409,000</strong></td>
<td><strong>$45,566,000</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>REVENUES</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Gifts, Grants and Bequests</td>
<td>$30,907,000</td>
<td>$16,494,000</td>
</tr>
<tr>
<td>Investment Gains (Losses)</td>
<td>$3,158,000</td>
<td>$2,128,000</td>
</tr>
<tr>
<td>Administrative Fees</td>
<td>$402,000</td>
<td>$335,000</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>$11,000</td>
<td>$30,000</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES</strong></td>
<td><strong>$34,478,000</strong></td>
<td><strong>$18,987,000</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GRANTS &amp; EXPENSES</th>
<th>June 30, 2019</th>
<th>June 30, 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>$9,977,000</td>
<td>$9,547,000</td>
</tr>
<tr>
<td>Other Program Expenses</td>
<td>$714,000</td>
<td>$598,000</td>
</tr>
<tr>
<td><strong>Total Program Services</strong></td>
<td><strong>$10,691,000</strong></td>
<td><strong>$10,145,000</strong></td>
</tr>
<tr>
<td>Fundraising</td>
<td>$152,000</td>
<td>$105,000</td>
</tr>
<tr>
<td>Management and General</td>
<td>$314,000</td>
<td>$329,000</td>
</tr>
<tr>
<td><strong>TOTAL GRANTS &amp; EXPENSES</strong></td>
<td><strong>$11,157,000</strong></td>
<td><strong>$10,579,000</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHANGE IN NET ASSETS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in net assets</td>
<td>$23,321,000</td>
</tr>
<tr>
<td>Net assets, beginning of year</td>
<td>$42,868,000</td>
</tr>
<tr>
<td><strong>Net assets, end of year</strong></td>
<td><strong>$66,189,000</strong></td>
</tr>
</tbody>
</table>
WHAT SPARKS YOUR GENEROSITY?

AN IMPORTANT CAUSE?

In Fiscal Year 2018-2019, the Community Foundation awarded a record 1,276 grants for a total of approximately $10 million, through donor advised and other types of funds. During this same time period, the Community Foundation awarded $562,500 to 13 local nonprofit charitable organizations from its Community Enrichment Fund.

THE ARC OF INDIAN RIVER COUNTY: $100,000 for construction of a Fragile Group Home.

BOYS AND GIRLS CLUBS OF INDIAN RIVER COUNTY: $50,000 for construction of a new facility in Fellsmere.

CROSSOVER MISSION: $15,000 for a full-time volunteer coordinator.

DOGS FOR LIFE: $25,000 for the Veteran Service Dog Training Program.

GIFFORD YOUTH ACHIEVEMENT CENTER: $100,000 for construction of a facility expansion.

GIRLS ON THE RUN OF THE TREASURE COAST: $5,000 for the Youth Development Initiative.

INDIAN RIVER COUNTY HEALTHY START COALITION: $25,000 for the Healthy Families Program.

INDIAN RIVER HABITAT FOR HUMANITY: $25,000 to match donations for scholarships for Habitat homeowners and their families.

LAURA RIDING JACKSON FOUNDATION: $50,000 to support relocation of poet’s historic home to Mueller Campus of Indian River State College.

MCKEE BOTANICAL GARDEN: $100,000 to support construction of the Children’s Garden at McKee.

ST. FRANCIS MANOR: $15,000 to replace windows in 45-year old housing facility for low-income seniors.

SUNSHINE PHYSICAL THERAPY CLINIC: $22,500 to match donations to purchase new fitness equipment.

VETERANS COUNCIL OF INDIAN RIVER COUNTY: $30,000 to support the “Veterans Helping Veterans” home repair program.
Our joint funding and leadership of this project will help identify community needs, determine duplication or gaps in services and inform where programming or collaboration might be effective.

**Three Ways To Give**

1. **WE HELP GENEROUS PEOPLE TO SIMPLIFY THEIR DONATIONS AND GIVE TO THE CAUSES THEY LOVE THROUGH DONOR ADVISED FUNDS.**

   A donor advised fund at the Community Foundation allows us to make tax-advantaged contributions, and then use the account to support the different charities that are important to us throughout the year. We are very happy with how easy it has been.

   MARYBETH AND CHUCK CUNNINGHAM
   MARYBETH AND CHUCK CUNNINGHAM FAMILY FOUNDATION

2. **WE INSPIRE GENEROUS PEOPLE TO CREATE AND LEAVE A CHARITABLE LEGACY TO SUPPORT CAUSES THEY CARE ABOUT THROUGH PERMANENT ENDOWMENTS.**

   As a longtime volunteer and donor to Big Brothers Big Sisters, I care deeply about the future of our community's young people. With help from the Community Foundation and my advisor, my charitable remainder trust will provide financial support for me throughout my life and for this important charitable legacy in the future.

   JOANNA CUOMO SCOTT-MEYERS
   THE JOANNA CUOMO SCOTT-MEYERS FUND
   ALMA LEE LOY LEGACY SOCIETY

3. **WE USE THE PHILANTHROPIC CAPITAL ENTRUSTED TO US TO FIND, FUND AND FOLLOW EFFECTIVE CHARITABLE ORGANIZATIONS, PROGRAMS AND PROJECTS THAT MAKE OUR COMMUNITY BETTER.**

   Our joint funding and leadership of this project will help identify community needs, determine duplication or gaps in services and inform where programming or collaboration might be effective.

   MEREDITH EGAN, JEFF PICKERING, HOPE WOODHOUSE
   INDIAN RIVER COUNTY COMMUNITY NEEDS ASSESSMENT

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### ANNUAL ADMINISTRATIVE SUPPORT FEES

on the Market Value of Fund Assets

1.00% on the first $1 MILLION
0.60% on the next $1 MILLION
0.30% on the next $2 MILLION
0.10% on the next $3 MILLION
FLAT 0.25% on funds $7 MILLION+

MINIMUM OF $250 ANNUAL ADMINISTRATIVE SUPPORT FEE

Administrative support fees sustain the Indian River Community Foundation’s mission-based operations.

To learn more about starting your own charitable giving account, contact our Donor Services team at donorservices@ircommunityfoundation.org or 772.492.1407.
OUR FUNDS

Anon (29)
A Caring Family Fund
Acts 20:35 Fund
Alexander Family Fund
Millicent W. Allen Memorial Endowment Fund
Alzheimer Parkinson Association of IRC Agency Endowment Fund
Lois W. Appleby Fund
Lois W. Appleby Endowment Fund
Barton Family Fund
Becker Family Foundation
Better Future for Indian River County
Better Giving Endowment Fund
Better Giving Fund for Discretionary Grantmaking
Big Brothers Big Sisters of St. Lucie, Indian River and Okeechobee Counties Scholarship
Endowment Fund
Boyatt/Riefler Family Fund
Brickman Family Fund
Buffington Family Fund
Burr Family Foundation
Business for a Better Indian River County Fund
Carpenter’s Fund
The Carroll Family Fund
Charity Giving Card Fund
Childcare Resources of Indian River Endowment Fund
John W. Childs Charitable Fund
The Clifford Family Foundation
Community Enrichment Fund
Anne Cooney Family Charitable Fund
Carole and Phil Coviello Charitable Fund
David Tucker Coviello Family Fund
Marybeth and Chuck Cunningham Family Foundation
Currie Garner Family Fund
Davis Family Fund
Lindsay Davis Fund
Larry and Linda Depew Family Fund
Dillon Family Fund
Education Foundation of Indian River County Agency Endowment Fund
R & K Edwards Family Donor Advised Fund
Emmons Family Fund
Endowment for Better Mental Health in Indian River County
Evans Cross Family Fund
Todd and Kathy Fennell Gift Fund
Marty Fite Fund
Forrester Family Fund II
Frick Family Fund
Laura Frick Fund
Go Play Vero Fund
Good and Perfect Gift Fund
Robert D. and Deborah Rivel Goodale Fund
Steve and Carole Goodale Fund
Marie Gookin Fund
Graceson Fund
Lillian Woodward Graves Fund
Mary P. Graves Fund
Mary P. Graves Endowment Fund
H & J IRCF Fund
Hagopian Family Fund
Hammond Family Fund
Hammer Family Charitable Fund
Hartline Family Fund
Head, Heart and Hands of Indian River Club
Head, Heart and Hands of Indian River Club II
Heartwood Fund
Hemingway Hall Charitable Giving Fund
Hope for Families Center Agency Endowment Fund
IRCF Unrestricted Operating Fund
IRCF Unrestricted Operating Endowment
JDB Family Fund
R. B. Jennings Family Fund
Johnson Family Fund
Beth & David Johnston Family Fund
Doris R. Jorgensen Fund
Kahle Family Fund
Kanavha Fund II
Kindness Foundation
King Family Charitable Fund
Alan and Monica King Fund
Paul R. & Nancy J. Knapp Charitable Fund
Clare L. Kremer Fund
Louis L. Lawson Donor Advised Fund
The Learning Alliance Fund
Alma Lee Loy Fund
LSB Fund
Joseph P. and Dorothea Lucarelli
Luther Family Fund
Clint S. Malone Memorial Education Fund
Robert F. and Eleonora W. McCabe Fund
Richard G. and Laura G. McDermott Family Fund
McGraw Family Fund
Diana and Michael McMahon Fund
McManus Family Foundation
Melnick Family Fund
Melnick Family Scholarship Fund
Edward and Dawn Michael Fund
The Lee and John Moore Family Fund
Morrison Family Fund
Bill and Judy Munn Family Fund
Bela Nagy, Sr. Memorial Fund for the Indian River Soccer Association
Nehemiah Fund
Nelson Family Fund
Tom Nelson Charitable Fund
Newman Fund
Anna P. Nichols Fund
Old 100th Fund
Puff Family Fund
Pyles Family Fund
Pyles Family Grant Fund
Rahl Family Fund
Red Stick Golf Club Fund
Priscilla J. Reilly Charitable Fund
Riefler Family Fund
Duncan and Wendy Riefler Family Fund
Duncan Riefler Charity Fund
The Jagger W. Riefler Foundation
R. K. and S. L. Rolf Fund
Chris and Mary Ryan Family Fund
Chris and Mary Ryan Rowing Endowment Fund
Sameth Family Fund
Virginia & Warren Schwerin Family Fund
Dr. Michaela G. Scott Fund
The Joanna Cuomo Scott-Meyers Fund
Marjory S. Seinsoth Fund
Susan R. Sheehan Charitable Fund
Kenneth L. and Cheryl A. Shepard Charitable Fund
SRMcL Fund
Tommy and Simonetta Steyer Fund
Stork Foundation
Rebecca Streetman Fund
Dace and King Stubbs Fund
The Swan Family Charitable Fund
Robert J. and Margaret J. Theis Fund
Peter and Patricia Thompson Fund
Thurn Family Fund
Chris and Sue Tompkins Family Fund
Tribus Family Fund
Vero Beach Opera Endowment Fund
Vero Beach Rowing Capital Fund
Vero Beach Rowing Community Boathouse Building Fund
Jennifer M. Watson Fund
Williams Family Fund
Gloria G. Wood Fund
Wyonegonic Fund for Vero Beach Rowing
Vero Beach Opera Endowment Fund
Youth Sailing Foundation Fund
Youth Sailing Foundation Endowment Fund

Alma Lee Loy Legacy Society

The Alma Lee Loy Legacy Society was established in February 2011 to honor donors who entrust Indian River Community Foundation with their charitable legacy. Members of the Alma Lee Loy Legacy society are special people whose estate gifts will provide significant benefits to our community in the future. The following list recognizes Alma Lee Loy Legacy Society members who have notified Indian River Community Foundation of a bequest or planned gift through June 30, 2019.

Anonymous (9)
Bob and Becky Allen
Mr. and Mrs. Frank M. Appleby
Kerry A. Bartlett
Andrew and Ann Barton
Carole and Phil Coviello
John and Norma Darling
Mary P. Graves
Susan R. Hopkins
Christine Jacob
Clara L. Kremer
Robert R. Larsen
Louis L. Lawson
Alma Lee Loy
Mrs. Judy H. Malone
Robert J. and Eleonora W. McCabe
Richard G. and Laura G. McDermott
Nicholas and Elizabeth Melnick
Edward and Dawn Michael
Karen M. O’Connor
Jeff and Stephanie Pickering
Mr. and Mrs. Robert C. Puff
Sandy and Randy Rolf
Richard E. and Pauline J. Sameth
Mr. and Mrs. John J. Schumann
Dr. Michaela G. Scott
Joanna Scott-Meyers
Marjory S. Seinsoth
Brian M. Shambo
Sandy and Randy Rolf
Tommy and Simonetta Steyer
Dace and King Stubbs
The Jagger W. Riefler Foundation
Robert J. and Margaret J. Theis Fund
Andrew W. and Robin W. Williams

5070 N. Highway A1A, Suite 200  |  Vero Beach, FL 32963  |  (772) 492-1407
Mailing Address:   P.O. Box 643968  |  Vero Beach, FL 32964  www.ircommunityfoundation.org