A Measure of Our Mission
2020 - 2021
A Year of Growth, Unprecedented Generosity, and Impact

Despite the challenges presented by the continuation of the global pandemic, the Community Foundation’s 2020-2021 fiscal year was another strong year of asset growth, increased financial stability, consistent, uninterrupted service to clients and local charities, and meaningful community impact through grantmaking and the launch of a new resource – Indian River Indicators. Thank you for taking time to learn about our continued progress toward achieving our mission of “building a better community through donor-driven philanthropy.”
Summarized from the audited June 30, 2021 financial statements prepared by Rehmann Robson LLC. A copy of the audited financial statement is available upon request.

### Financial Highlights (2008 – 2021)

<table>
<thead>
<tr>
<th>Year</th>
<th>ASSET GROWTH</th>
<th>NUMBER OF FUNDS</th>
<th>CUM. GRANTS GROWTH by $</th>
<th>CUM. GRANTS GROWTH by #</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>$0</td>
<td>0</td>
<td>$0</td>
<td>0</td>
</tr>
<tr>
<td>2015</td>
<td>$29M</td>
<td>128</td>
<td>$30M</td>
<td>3,038</td>
</tr>
<tr>
<td>2021</td>
<td>$89M</td>
<td>203</td>
<td>$82M</td>
<td>10,491</td>
</tr>
</tbody>
</table>

Indian River Community Foundation is a 501(c)(3) public charity (Tax ID #20-1729243). Contributions are tax deductible as allowed by law. THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION FOR THE INDIAN RIVER COMMUNITY FOUNDATION (CH18151) MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE WITHIN THE STATE, 1(800) HELP-FLA. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL OR RECOMMENDATION BY THE STATE.
In Fiscal Year 2020-2021, the Community Foundation awarded a record 1,547 grants for a total of $11.4 million through donor advised and other types of funds. Almost $1 million was awarded in discretionary grants to meet some of our community’s most pressing needs and to preserve some of our community’s most treasured resources. Here are three examples that made a significant impact.

**Better with Help from Indian River Community Foundation**

Youth Guidance Mentoring Academy — $30,000

Last year, 40 percent of Indian River County’s third-grade students are not able to read, and 35 percent of eighth-grade students are not proficient in math. Led by executive director Phil Barnes, Youth Guidance Mentoring Academy is dedicated to enriching the lives of Indian River County youth through mentoring relationships that inspire trust, self-esteem and positive futures. Through one-on-one and group mentoring programs, Youth Guidance helps kids build a path out of poverty toward greater prosperity. This grant provided operating support to help the organization respond to students impacted by COVID-19 by opening an all-day learning center to prevent further learning loss and to help maintain academic progress.

Hope for Families Center — $50,000

Last year, more than 500 students enrolled in School District of Indian River County schools were homeless. While many of these children lived in shared housing, others lived in shelters, motels, cars and outdoors. For the last several years, Dr. William Cooney has served as chairman of the Hope for Families Center board of directors, leading efforts to transition families from homelessness to sustainable permanent housing. This grant provided operating support for proven, dignified programs that meet the needs of homeless children and their families.

Indian River Land Trust — $100,000

Indian River Land Trust protects the land that protects the Indian River Lagoon. In doing so, the organization preserves and protects more than 1,200 acres and 12 miles of shoreline, while providing public recreation and education to visitors and residents of the community. This meaningful work will be bolstered by the success of a recent $12 million “Campaign to Protect the Land that Protects the Lagoon,” led by honorary co-chairs Bill Buck, Dick Brickman, and Ned Dayton. This grant provided support to help complete the campaign.
Three Ways to Give

Trust Us with Your Philanthropy

1. Open Your Own Charitable Giving Account
   We help generous people to simplify their donations and give to the causes they love through donor advised funds.

Sandy and Randy Rolf
R.K. and S.L. Rolf Fund
Alma Lee Loy Legacy Society
“We believe you should support the community in which you live through charitable giving. For those who share our belief in giving where you live but are not sure how to do so, we recommend seeking the guidance of the professionals at the Indian River Community Foundation. They love Vero Beach as much as we do.”

2. Make a Planned Gift and Join the Alma Lee Loy Legacy Society
   We inspire generous people to create and leave a charitable legacy to support causes they care about through permanent endowments.

Louis L. Lawson
Louis L. Lawson Endowment Fund
Alma Lee Loy Legacy Society
Louis Lawson passed away at the age of 78 on October 9, 2019. The retired life insurance executive and talented singer donated his time and resources to many local charities. Planned gifts from Mr. Lawson’s estate will support the Vero Beach Opera and other causes he loved in perpetuity.

3. Give to IRCF’S Annual Fund or Endowment
   We use the philanthropic capital entrusted to us to find, fund and follow effective charitable organizations, programs and projects that make our Indian River County community better.

Tools to Support More Effective Giving
Finding the data and information needed to know that donated time, talent or treasure is making a real difference can be challenging. Indian River Indicators is a resource that provides data in Indian River County to indicate where we are making progress and where improvement is needed.

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

DONATE
TO YOUR FUND AND RECEIVE A TAX DEDUCTION

$ CASH
$ STOCKS

YOUR DONOR ADVISED FUND

INVEST WITH
YOUR FINANCIAL ADVISOR
OR

OTHER ASSETS
REAL PROPERTY

CHOOSE FROM OUR INVESTMENT POOLS

GRANT
TO 501(C)(3) PUBLIC CHARITIES AT YOUR CONVENIENCE

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 Indian River Community Foundation’s mission-based operations.
Our Funds

The following charitable giving accounts have been established by generous individuals, families, and organizations through June 30, 2021. We are grateful for the trust that each has placed in Indian River Community Foundation as a partner in philanthropy and apologize for any fund names inadvertently omitted.

Anonymous (37)
A Caring Family Fund
Acts 20:35 Fund
Alexander Family Fund
Millicent W. Allen Endowment Fund
Alzheimer Parkinson Association of IRC Agency Endowment Fund
Angerman Koch Fund
Lois W. Appleby Fund
Lois W. Appleby Endowment Fund
Barton Family Fund
Becker Family Foundation
Better Future for Indian River County
Big Brothers Big Sisters of St. Lucie, Indian River and Okeechobee Counties Endowment Fund
Boyatt/Riefier Family Fund
Brickman Family Fund
Buffington Family Fund
Burr Family Foundation
Carpenter’s Fund
Carroll Charity Fund
The Carroll Family Fund
Childcare Resources of Indian River Endowment Fund
The Clifford Family Foundation
Community Enrichment Fund
Anne Cooney Family Charitable Fund
Carole and Phil Coviello Charitable Fund
David Tucker Coviello Family Fund
Manyneth and Chuck Cunningham Family Foundation
Currie Garner Family Fund
Davis Family Fund
Lindsay Davis Fund
Lary and Linda Depew Family Fund
Dillon Family Fund
Rene and Alice Donors Fund
Education Foundation of Indian River County Agency Endowment Fund
R & K Edwards Family Donor Advised County Agency Endowment Fund
Emmons Family Fund
Endowment for Better Mental Health in Indian River County
Evans Cross Family Fund
Thomas C. Farnsworth, Jr. Fund
Todd and Kathy Fennell Gift Fund
First Presbyterian Church VB Sanctuary Fund
Marty Fite Fund
Forrester Family Fund II
Frick Family Fund
Laura Frick Fund
Future Leaders Professional Advisors Fund
Good and Perfect Gift Fund
Robert D. and Deborah Rivel Gooddale Family Fund
Steve and Carole Goode Family Fund
Marie Gookin Fund
Graceman Fund
Lillian Woodward Graves Fund
Mary P. Graves Fund
Mary P. Graves Endowment Fund
H & J RCF Fund
Hagopian Family Fund
Hammond Family Fund
Thomas Hill Hammond Fund
Hamner Family Charitable Fund
Laraine K. Harrison Charitable Fund
Hardtine 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
Higgs Family Foundation
Hope for Families Center Agency Endowment Fund
Indian River County Healthy Start Coalition Endowment Fund
Indian River Golf Foundation Capital Projects Fund
Indian River Golf Foundation Endowment Fund
IRCF COVID 19 Fund
IRCF Grantmaking Fund
IRCF Grantmaking Endowment Fund
IRCF Operating Fund
IRCF Restricted Operating Endowment
Jane and Robert Janicki DAF
JDB Family Fund
Johnson Family Fund
Beth & David Johnston Family Fund
Kahle Family Fund
Kanawha Fund II
Kindness Foundation
King Family Charitable Fund
Alan and Monica King Fund
Paul R. & Nancy J. Knapp Charitable Fund
Clare L. Kremier Fund
Louis L. Lawson Fund
The Learning Alliance Fund
Laura Riding Jackson Foundation: Personnel and Benefits Fund
Wanda W. Lincoln Charitable Fund
Long Family Charitable Fund
Alma Lee Loy Endowment Fund
LSB Fund
Joseph P. and Dorothea Lucarelli Family Fund
Luther Family Fund
Clint S. Malone Memorial Education Fund
The Sheila Marshall Fund
The Martingale Family 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
MHA Endowment Fund
Edward and Dawn Michael Fund
James and Joanne Mitchell Charitable Fund
The Lee and John Moore Family Fund
Messinger Family Fund
Bill and Judy Munn Family Fund
Bela Nagy, Sr. Memorial Fund for the Indian River Golf Foundation
Bela Nagy, Sr. Memorial Fund for the Indian River Soccer Association
Nehemiah Fund
Tom Nelson Charitable Fund
Wally and Peggy Nelson Family Fund
Newman Fund
Karen M. O’Connor Fund
Old 100th Fund
John and Jessica Paik Family Trust Fund
Puff Family Fund
Pyles Family Fund
Pyles Family Grant Fund
Rahil Family Fund
Red Stick Golf Club Fund
Priscilla J. Reilly Charitable Fund
Charles H. Reynolds, Jr. Fund
Riefier Family Fund
Duncan Riefier Charity Fund
Duncan and Wendy Riefier Family Fund
The Jagger W. Riefier Foundation
R. K. and S. L. Rolf Fund
The Ron and Nancy Rosner Vero Foundation
Chris Ryan Family Fund
Chris Ryan Rowing Endowment Fund
Mary L. Ryan Fund
Larry and Susan Salustro Family Fund
Sameth Family Fund
Sameth Family IRA Rollover Fund
Saver Family Fund
Virginia & Warren Schwerin Family Fund
Dr. Michaela G. Scott Fund
The Joanie Guomo Scott-Meyers Fund
Marjory S. Seinsoth Fund
Senior Resource Association Endowment Fund
Susan R. Sheehan Charitable Fund
Kenneth L. and Cheryl A. Shepard Charitable Fund
Datha and Gene Smith Family Fund
SRMCF Fund
Steyer Fund for My Vision for Refugees Fund
Tommy and Simonetta Steyer Fund
Stiefel Family Foundation II
Stork Foundation
Rebecca Streetman Fund
Dace and King Stubbs Fund
The Swan Family Charitable Fund
Peter and Patricia Thompson Fund
Thum Family Fund
Chris and Sue Tompkins Family Fund
Tribus Family Fund
Vero Beach Opera Endowment Fund
Vero Beach Rowing Capital Fund
Vero Beach Rowing Endowment Fund
Vero Beach Rowing Youth Achievement Fund
Vero Beach Woman’s Club Restoration Fund
Jennifer M. Watson Fund
Williams Family Fund
Gloria G. Wood Fund
Wyonegonic Fund for Vero Beach Rowing
Youth Guidance Indian River Endowment Fund
Youth Sailing Foundation Fund
Youth Sailing Foundation Endowment Fund

The Alma Lee Loy Legacy Society honors 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, 2021.

Anonymous (9)
Mr. and Mrs. Frank Appleby
Drew and Ann Barton
Betsy L. Begens
Bob and Emilie Burr
Carole and Phil Coviello
Marybeth and Chuck Cunningham
John and Norma Darling
Andrew H. and Betsy G. Forrester
Bob and Mary Jane Gribb
Mary P. Graves
Laraine K. Harrison
George D. Higgs
Susie and Brian Hill
Baldwin and Christine Jacob
Clare L. Kremier
Robert and Bonée Larsen
Louis L. Lawson
Alma Lee Loy
Judy H. Malone
Ellie and Bob McCabe
Rick and Laura McDermott
Nicholas and Elizabeth Melnick
Ted and Dawn Michael
Jack and Carolyn Norris
Karen M. O’Connor
Mr. and Mrs. Jeffrey R. Pickering
Bob and Nancy Puff
Sandy and Randy Rolf
Christopher Ryan
Richard E. and Pauline J. Sameth
Dr. Dennis F. Saver
John and Kathi Schumann
Dr. Michaela Scott
Joanna Scott-Meyers
Marjory S. Seinsoth
Brian M. Shambo
Susan R. Sheehan
Tommy and Simonetta Steyer
Dace and King Stubbs
Fred and Roddy Tattersall
Robert and Peggy Theis
Andy and Robin Williams

Alma Lee Loy Legacy Society