

TRUMAN HEARTLAND COMMUNITY FOUNDATION

## 2024 ANNUAL REPORT

# BUILDING CONNECTIONS THROUGH GENEROSITY



Truman Heartland  
**COMMUNITY  
FOUNDATION**

Private Giving—Public Good

# BUILDING CONNECTIONS THROUGH GENEROSITY

Since 1982, the Truman Heartland Community Foundation has connected charitably minded donors with organizations making a lasting impact.

In 2024, donor generosity reached record levels, strengthening communities across Eastern Jackson, Cass, and Lafayette counties.

With more than 40 years of experience, we understand the region’s unique needs, and continue to support private giving for the public good, for generations to come.

## PRIVATE GIVING FOR PUBLIC GOOD IN 2024



***Pictured on the Cover:**  
Gene and Joanne Cable*



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# LEADERSHIP



## Building Connections For You

A Message from the 2024 Board Chair

**Lynette Wheeler**  
2024 Board Chair

As I reflect on the past year, I am pleased to share some noteworthy achievements of your Truman Heartland Community Foundation. We once again saw a record amount of generosity through Donor Advised Fund grants, competitive grants, and scholarship funds.

In 2024, grants and scholarship payments from all funds totaled nearly \$9 million, an increase of \$1.6 million over the total of \$7.3 million in 2023. That's a 23% increase in one year.

This annual report has a new feature that showcases the impact that our Donor Advised Fundholders are having on our communities. Grants from Donor Advised Funds this year reached \$4.5 Million, a 47% increase over 2023. See pages 14 and 15 for more details on how our Donor Advised Fundholders are connecting with nonprofits in our community and making a difference through their generosity.

In 2024, we achieved a new record in scholarships with awards of \$828,000 to 334 students in our community from 173 scholarship funds. Scholarships allow students from all walks of life to pursue higher education and, ultimately, achieve their career goals. We take great pride in connecting charitable individuals in our community who have a passion for education with students to assist them in achieving their educational dreams. See pages 22-25 for more information on our record-breaking scholarship year.

Your Foundation Board of Directors has the privilege of stewarding endowment funds that support our annual competitive grants program. This year 64 grants were awarded, totaling \$516,719, including \$108,210 for 16 new grantees. The total also includes \$84,565 from our generous fundholders and partners to add to the \$432,156 available from the endowed funds. See pages 16-21 for more information.

In 2024, the Foundation launched our Affordable Housing Initiative. At its September meeting your Board of Directors adopted the recommendations of the Affordable Housing Committee that included the creation of the Community First Loan Fund to provide financing to create affordable housing. See page 10 for more information on this exciting initiative.

We hope you enjoy reading this annual report and learning about the many ways that your Community Foundation connects generous people in our community with the causes they care most about.

Lynette Wheeler  
2024 Chair, Board of Directors

## 2024 BY THE NUMBERS



**Funds Distributed  
to Community**  
**\$8,977,210**



**Investment  
Earnings**  
**\$10,330,175**



**Contributions  
Received**  
**\$15,157,241**



**Total Assets**  
**\$104,701,110**



**Total Charitable  
Funds**  
**875**



# 2025 BOARD OF DIRECTORS

## Building Connections Between Charitable Donors and Philanthropy

### BOARD OF DIRECTORS

#### BOARD CHAIR



**Rochelle Parker**  
Girls Scouts of NE  
Kansas & NW Missouri

#### VICE CHAIR



**Michele Crumbaugh**  
Community Volunteer

#### SECRETARY



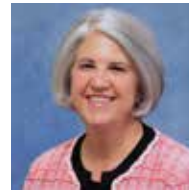
**R. Dyan Zimmerman**  
Oswald Rew, LLC

#### TREASURER



**Allan Thompson**  
Community Volunteer

#### IMMEDIATE PAST CHAIR



**Dr. Lynette Wheeler**  
Community Volunteer



**Rob Binney\***  
Southern Bank



**Charline Gray\***  
Cleaning Crew of KC



**Liesl Hays\***  
Aligned Talent  
Consulting



**Damon Hodges\***  
City of Raytown



**Adam Kliethermes**  
Edward Jones -  
Independence



**Bret Kolman**  
Community Volunteer



**Dr. Tom Meyer**  
Metropolitan Community  
College Kansas City



**Ritchie Momon**  
Mid-Continent Public  
Library



**Joe Mullins**  
Allero Telecom



**Steve Noll**  
Community Volunteer



**Dan O'Neill\***  
Reece Nichols



**Kim Roam\***  
Blue Ridge Bank & Trust  
Co - Wealth Mgmt Group



**Jovanna Rohs**  
Children's Services Fund  
of Jackson County



**Merideth Rose**  
Cornerstones of Care



**Dr. Beth Rosemergy**  
University Health  
Lakewood



**Dr. John Ruddy\***  
Community Volunteer



**Dr. Beth Savidge\***  
University of Missouri  
- Kansas City



**Derek Schoeneberg**  
NorthPoint  
Development



**Karen Schuler**  
Summit Career  
Coaching, LLC



**Bridgette Shaffer**  
Jackson County Health  
Department



**Beth Silverstein**  
Silverstein Funding  
Solutions



**Terri Steele**  
Evans And Steele  
Financial



**Cory Unrein\***  
Grain Valley News

Would you like to be considered  
for a Board position? Please  
contact Phil Hanson at  
[Hanson@thcf.org](mailto:Hanson@thcf.org)

*\*Welcome to our new Board members*

## ADVISORY BOARDS

### BLUE SPRINGS/ GRAIN VALLEY/ OAK GROVE

#### BOARD CHAIR

Cory Unrein

#### VICE CHAIR

Tom Rohr

#### SECRETARY

Ruth Hafner

Shayla Baxter  
Scott Chase  
Danica Fuimaono\*  
Mindy Hampton  
Keith Hannaman  
Tisha Homfeld  
Jill Johnston\*  
Chris Lievsay  
Tiffany Lor\*  
Lorne Meinershagen  
Jerry Vaughan  
JaMere Waddy Sr.\*  
Erik Winston\*

### INDEPENDENCE/ SUGAR CREEK

#### BOARD CHAIR

Dr. John Ruddy

#### VICE CHAIR

Mayor Mike Larson

#### SECRETARY

Jennifer O'Brien

Don Claphan  
Cindy Foster  
Beth Franklin  
Dr. Leigh Gruber\*  
Lori Halsey  
Dr. Barbara Martin\*  
Andrea McMillin\*  
Shari Miller  
Dr. Steve Morgan  
Alice Moroso\*  
Mike Rodriguez  
Stacie Short  
Patti Simcosky

### LEE'S SUMMIT/ LAKE WINNEBAGO

#### BOARD CHAIR

Rob Binney

#### VICE CHAIR

Nick Parker

#### SECRETARY

Dr. Ryan Crider

Rev. Aaron Brown  
Stephanie Conner\*  
John Dane  
Antwan Daniels  
Trey DeRousse  
Ryan Gibson  
Duane Jordan\*  
Madison Kunkel  
Kelley Manning  
Canise Salinas-Willich  
Michele Spilker  
Dr. Joy Vann-Hamilton  
Joel Wilson

### RAYTOWN

#### BOARD CHAIR

Damon Hodges

#### VICE CHAIR

Rene Purtee

#### SECRETARY

Matt Verlinden

Toni Alexander  
Melina Alford\*  
Dr. Robert Cordell  
Josh Morales\*  
Brian Morris  
Stephanie Peterson\*  
Demonte Rochester  
Ian Scott  
Zac Sweets  
Daneen Thurman  
Dave Turner

*\*Welcome to our new  
Advisory Board members*

## COMMITTEES

AFFORDABLE HOUSING INITIATIVE

AUDIT

DEVELOPMENT

FINANCE

HUMAN RESOURCES

GALA

GALA SPONSORSHIP

GRANTS

INVESTMENT

MISSION RELATED INVESTMENTS

NOMINATING

REAL ESTATE MANAGERS

SCHOLARSHIPS

SCHOLARSHIP ADVISORY

*All Committees are made up of Board members or  
Advisory Board members, with the exception of the  
Gala Committee and Investment Committee.*

## STAFF



**Phillip J. Hanson,  
MPA, CAP®**  
President  
& CEO



**Bridget Stoppelman**  
Chief Financial  
Officer



**Cole Eason, JD**  
Vice President of  
Advancement



**Diana Castillo**  
Vice President of  
Community Impact



**Rachael Cassiday  
Watkins, MFA**  
Director of  
Scholarships



**Melanie Adkins, MA**  
Director of  
Marketing &  
Communications



**Joanne Smith**  
Office Administrator



**Lynn Oltmanns**  
Administrative  
Assistant

# OUR MISSION

## Connecting Private Giving for the Public Good

Our Mission is improving area communities by promoting and serving private giving for public good.

## WE PROVIDE STEWARDSHIP OF DONOR FUNDS

We manage grant and scholarships programs funded by donor funds.

### WE SUPPORT GENEROUS DONORS

We help charitable donors pool their money and other resources. We provide the following services:

- Charitable giving strategy
- Tax-Wise options for your giving
- Matching donors with fields of interests
- Professional advisor partnerships
- Planned giving support
- Endowment planning
- Non-Profit asset management
- Online donor portal

### DONOR IMPACT ON THE COMMUNITY

We manage the generous funds of our donors to create a profound impact on our communities.

#### Total Grants and Scholarships Awarded to the Community in 2024

2,420

\$9M

#### Scholarships Awarded

461

\$828K

#### Competitive Grants Awarded

64

\$516K

### OTHER AREAS OF FOCUS

We also use operating funds to invest in leadership and strategic initiatives that serve the community:

#### Building Philanthropic Leaders

- Youth Advisory Council (YAC)
- 7 School Districts + 11 High Schools + 70+ students

#### Addressing Community Needs

- 2024 Affordable Housing Initiative Launched
- 2000 Job Skills Initiative successfully transferred leadership to Community Services League

#### Engaging Community Voices

Board Members:

- 28 Board Members
  - 62 Advisory Board Members + 4 Regions
- Celebrating Philanthropy through the Toast to our Towns Gala

## MEMBERSHIPS





ESTABLISHED IN

1982

>> As a community leader, Truman Heartland has been a catalyst for change and a trustworthy resource in suburban Eastern Jackson County and beyond for more than 40 years. With an accumulated \$100 million in assets, we are a trusted leader in charitable giving and fund stewardship.

## Connecting Your Legacy with Your Community

When donors recognize the power of their giving, they seek to refine their goals and maximize impact. We're here to guide them on their philanthropic journey to creating a lasting legacy.

### PHASE 1 SUPPORT THE MISSION OF THE FOUNDATION

#### Contribute Financially

- Join our Foundation Fan Club
- Contribute to our Sustainability Fund
- Support our Youth Advisory Council
- Attend or sponsor the Annual Gala

#### Get Involved

- Refer friends or clients
- Become a Professional Advisor Partner
- Serve on an Advisory Board

### PHASE 2 ESTABLISH STRATEGIC GIVING THROUGH A CHARITABLE FUND

Establishing a fund lets you maximize tax benefits while focusing on the causes that matter most to you.

#### Types of Funds

- Donor-Advised (\$5,000 min)\*
- Designated (\$5,000 min)
- Field of Interest (\$5,000 min)
- Scholarship (\$25,000 min)
- Charitable Gift Annuity (\$30,000 min)
- Charitable Remainder Trust (\$250,000 min)

#### Ways to Contribute to your Funds

- Cash
- Appreciated Stock
- IRA Qualified Charitable Distributions\*\*
- Real Estate
- Cryptocurrency

### PHASE 3 STRENGTHEN YOUR LEGACY THROUGH PLANNED GIVING

After establishing charitable giving, Planned Giving becomes a natural next step to ensure your legacy of generosity.

#### These are common ways to plan your legacy:

- Create a Bequest of assets through a will or trust
- IRA Beneficiary Designation
- Life Insurance Policy
- Create an Endowment\*\*\*

*\*Donor-Advised Funds are like personal "Giving Accounts." They are increasingly used and represent about 50% of our total number of managed funds. They offer the most flexible options for contributing frequently to causes of interest, with access to a variety of tax benefits.*

*\*\*Exceptions apply.*

*\*\*\*All Charitable Giving Funds can be transitioned into an endowment through a trust or will to ensure future giving.*

## BENEFITS OF STRATEGIC GIVING THROUGH OUR FOUNDATION

When you plan your charitable giving with local experts, you reap the benefits financially and personally:

#### Financial Benefits:

- Maximize tax benefits
- Simplify record-keeping
- Capitalize on appreciated stock
- Grow your giving while your earnings grow
- Help heirs avoid income tax
- Simplify estate planning

#### Personal benefits:

- Make an impact locally
- Impact a cause you care about
- Involve heirs in your legacy
- Assurance that your legacy will be managed according to your wishes

#### Positive Solutions for Life Changes:

- Creating a tribute to honor a loved one
- Selling or transferring a family business
- Transitioning to retirement

# YOUTH ADVISORY COUNCIL

## Connecting Students to Philanthropy

In 1998, THCF had been receiving grant proposals to serve child and youth audiences. They recognized the need for the proposals to be reviewed by a group of people that could be affected by them. In response, we launched the Youth Advisory Council (YAC), a “School of Philanthropy” for students in Eastern Jackson County. The students were able to serve with their peers, and gain their voice through volunteering, fundraising, and grantmaking.



*Youth Advisory Council*  
Truman Heartland Community Foundation

## YAC STUDENTS BY THE NUMBERS



**7**  
DISTRICTS



**11**  
SCHOOLS



**70+**  
STUDENTS

## YAC SCHOLARSHIP RECIPIENTS

### Henri E. Goettel Youth in Philanthropy Award (est. 2009)

Created by the Board to honor Henri E. Goettel’s service to YAC, this scholarship is exclusively for YAC members.

### Elizabeth Hill McClure Scholarship (est. 2014)

Established to recognize Elizabeth McClure’s 20 years at THCF, particularly her role in founding and supporting YAC, including the annual grant review process.

### 2024 RECIPIENTS:



#### Henri E. Goettel Youth in Philanthropy Award

Isabella Wells,  
Metropolitan  
Community College-  
Blue River



#### Elizabeth Hill McClure scholarship

Nate Keeton,  
University of  
Missouri – Columbia



#### Elizabeth Hill McClure Scholarship

Julianna Onstott,  
Metropolitan  
Community College-  
Blue River

### 2024-25 YAC TEAM LEADERS

#### Blue Springs High School

Teonna Franklin  
Carson Mullins

#### Blue Springs South High School

Madi Herrington  
London Roberts  
Yashica Sharma

#### Fort Osage High School

Aubrey Miller  
John Winingar

#### Grain Valley High School

Clara Hunt  
Katie Keeton  
Ellie Martin

#### Lee’s Summit High School

Jimmy Shipman  
Kacey Worthy

#### Lee’s Summit North High School

Chloe Adkins  
Jayla Logan-Hernandez

#### Lee’s Summit West High School

Addison Burks

#### Oak Grove High School

Ave-Marie Johnson-Tribout

#### Raytown High School

Bella Caponetto

#### Raytown South High School

Hal Hetzel

#### Truman High School

Melissa Leroy  
Caleb Scholes  
Mary Quintanilla



## OUR YAC STUDENTS IN ACTION

### ANNUAL FOOD DRIVE

#### Four Hy-Vee Locations

March 23, 2024

YAC students and board members spent a spring morning collecting non-perishable donations at four Hy-Vee stores in Eastern Jackson County. Thanks to the community's generosity, they filled several trucks with thousands of essential items, which were then donated to local pantry programs in Independence, Blue Springs, Lee's Summit, and Raytown.



### ANNUAL FUNDRAISER

#### Strike in the Night: Cosmic Caring-Changing the Universe

April 27, 2024

YAC Students organized their successful fundraiser called "Strike in the Night: Cosmic Caring-Changing the Universe" at the Lunar Bowl in Blue Springs. This family-friendly bowling night raised an impressive \$7,096 to contribute to their YAC Endowment Fund.



### ANNUAL HOLIDAY SERVICE PROJECT

#### Project Beneficiary: Salvation Army of Independence's Crossroads Shelter

December 19, 2024

In December, YAC members gathered at Bingham-Waggoner's Carriage House for their holiday party, followed by a tour of the decorated mansion and a lesson on volunteer opportunities. Embracing the season of giving, YAC students, along with the THCF Board and Advisory Boards, collected hundreds of essential items for the Salvation Army's Crossroads Shelter. Their generosity and commitment to the community continue to inspire!



## THEY MANAGE THE YAC ENDOWMENT FUND

### About the YAC Endowment Fund

Established in 2004, the YAC Endowment Fund supports charitable projects through competitive grants. YAC students fundraise and allocate funding annually. The fund currently exceeds \$120,000.

### YAC Students Evaluate Competitive Grant Applications

YAC students are empowered to assess competitive grant applications. Each summer, they review 16 applications, make on-site visits to nonprofit agencies, and present findings to the THCF Grants Committee. In September, they vote on grant recipients from their endowment fund.

## YAC STUDENTS AWARDED 3 GRANTS IN 2024



Sleep in Heavenly Peace

Lee's Summit Meals on Wheels

Marian Hope



**TOTALING \$4,089**

Total awarded since 2008: \$42,128

# AFFORDABLE HOUSING INITIATIVE

## Connecting our Communities with Safety and Stability

Research shows that affordable housing shortages impact mental and physical health, finances, and self-sufficiency in our region. In 2024, we launched the Affordable Housing Initiative to address access to rental units and home ownership opportunities in Eastern Jackson County.

### KEY FINDINGS ABOUT AFFORDABLE HOUSING

#### Limited Supply

Zoning laws, high mortgage rates, and investor purchases restrict availability.

#### Income Struggles

Lower- and middle-income families face the greatest challenges.

#### Funding Gaps

Non-profits working on this challenge struggle to finance projects.

#### Regional Efforts

MARC and LISC are working on this through the Regional Housing Partnership.

#### Community Investment

Other foundations use Mission Related Investments to help.

#### Health Impact

Jackson County Public Health has identified affordable housing as a major health challenge.

#### Neighborhood Resistance

Opposition to affordable housing remains strong.

### WE ARE COLLABORATING FOR HOUSING STABILITY

We are actively supporting the **Jackson County Health Department's Housing & Economic Stability Lab**, a workgroup focused on healthy housing, inclusionary zoning, and equitable development to drive regional impact.

### WE ESTABLISHED THE COMMUNITY FIRST LOAN FUND

In 2024, we launched the Community First Loan Fund, investing 10% of our endowed Community Grant Funds into local affordable housing projects instead of Wall Street bonds.

This \$900K fund is designed to provide loans to nonprofits, government, and private entities addressing housing needs in Eastern Jackson County.

DAF Fundholders will be invited to contribute as funds are utilized. Loan proposals are reviewed by the Mission Related Investment Committee and approved by the THCF Executive Board.

Contact Diana Castillo at [castillo@thcf.org](mailto:castillo@thcf.org) for details.

### COST BURDENED HOUSEHOLDS IN OUR AREA

Across Eastern Jackson County, 22% of the population are either Cost Burdened or Severely Cost Burdened by housing.

22%

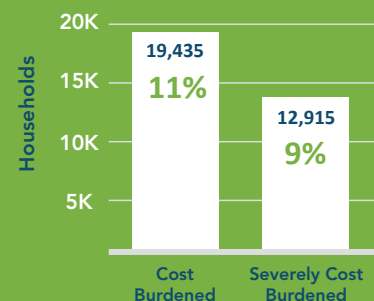
#### Cost Burdened

Paying 30-50% of Household Income for Housing

#### Severely Cost Burdened

Paying over 50% of Household Income for Housing

Total number of households in Eastern Jackson County: 145,783



#### The 8 communities of Eastern Jackson County:

- Blue Springs
- Grain Valley
- Grandview
- Independence
- Lee's Summit
- Oak Grove
- Raytown
- Sugar Creek

# BEHIND THE SCENES

## Connecting our Fundholders with Boots on the Ground

Throughout the year, we offer special opportunities to connect our fundholders with the organizations working to address the changing needs of our community.

### BEHIND THE SCENES EVENTS

These educational events offer donors an exclusive look at nonprofits who are making an impact in Eastern Jackson County and the surrounding communities. Behind the Scenes events help fundholders learn about the needs of our region and provide an opportunity for you to connect with leadership and support their work.



BEHIND THE  
**SCENES**  
WITH PRO DEO

#### 2024 SPRING

**Pro Deo Youth Center | Lee's Summit**

*Visited on May 2, 2024*

Pro Deo provides teens with resources and support to achieve their dreams, ensuring every young person has a champion in their corner. In 2023, a generous donation launched plans for a new facility, allowing them to expand their impact. Currently in a capital campaign, they seek additional funding for a space filled with stories of hope and giving back. During our visit to their existing center, 80 attendees learned about their vision and their significant impact on Lee's Summit youth.



BEHIND THE  
**SCENES**  
WITH THE KANSAS CITY ZOO  
SOBELA AQUARIUM

#### 2024 SUMMER

**Kansas City Zoo | SOBELA Aquarium**

*Visited on July 23, 2024*

At this special event, we explored the Kansas City Zoo's stunning new 650,000-gallon aquarium, home to nearly 8,000 animals across 34 habitats. This world-class facility showcases how ocean currents connect marine life globally, offering an immersive ocean experience in the heart of the Midwest. Our fundholders were amazed to see the transformation since their hardhat tour in October 2022. Now fully realized, the aquarium left a lasting impression on the 107 attendees.



# 29TH ANNUAL GALA

## Connecting Philanthropists with Deserved Recognition

This special event honors exceptional philanthropy, local giving, and community service.



### 2024 TRUMAN HEARTLAND AWARD HONOREES

Nominees for these awards are identified every year by the Board of Directors, based on established criteria.



#### HEARTLAND HUMANITARIANS OF THE YEAR

Doug and Helen Hatridge



#### HEARTLAND CORPORATE CITIZEN OF THE YEAR

Community America Credit Union



#### HEARTLAND SERVICE AWARD

Child Abuse Prevention Association



#### DR. PAUL M. THOMSON PROFESSIONAL ADVISOR OF THE YEAR

Craig Bolger

### OUTSTANDING CITIZENS OF THE YEAR

These Honorees were individually selected by the Mayors of their towns. Thank you to Dr. Nancy Newhouse and Dr. Paul McGraw for hosting a private Citizen's Reception for honorees and the mayors.

#### Blue Springs



#### BOBBY HINES

Selected by Mayor Chris Lievsay

#### Grain Valley



#### EDDIE SAFFELL

Selected by Mayor Mike Todd

#### Independence



#### ALVERZIA PETTIGREW

Selected by Mayor Rory Rowland

#### Lake Tapawingo



#### ROBERT "BOB" SEAGO

Selected by Mayor Tom Rodenberg

#### Lee's Summit



#### DAVE EAMES

Selected by Mayor Bill Baird

#### Oak Grove



#### RUTH ANN HAFNER

Selected by Mayor Dana Webb

#### Raytown



#### PAT ERTZ

Selected by Mayor Mike McDonough

#### Sugar Creek



#### JOHN C. "CHUCK" MIKULICH (POSTHUMOUS)

Selected by Mayor Mike Larson

# GALA SPONSORS

## PRESENTING SPONSOR - \$15,000



## CITIZEN'S RECEPTION - \$7,500



## MIX, MINGLE AND MUSIC - \$10,000



## COCKTAIL RECEPTION - \$10,000



## BENEFACTOR SPONSORS - \$5,000

Bennett Packaging  
Centerpoint Medical Center  
CommunityAmerica Credit Union  
Dunn Family Foundation  
Edward Jones Representatives  
Ewing Marion Kauffman Foundation

Humphrey Farrington McClain  
Midwest Trust Company  
Rotary Club of Independence  
Silverstein Eye Centers

## TABLE SPONSORS - \$2,500

Arbo Consulting Services  
Craig and Debbie Bolger  
Carefree Industrial Park  
Centric Construction Group, LLC  
Child Abuse Prevention Association  
Children's Mercy Hospitals & Clinics  
City of Blue Springs  
City of Grain Valley  
City of Independence  
City of Lake Tapawingo  
City of Lee's Summit  
City of Oak Grove  
City of Raytown  
Community Services League  
Englewood Arts  
Pat and Shari Ertz  
Randall and Helen Ferguson, Jr.  
Dana and Judy Forrester /  
Melanie Moentmann

Fort Osage School District  
Mike and Linda Gerding/Dr. Bill Pogson  
Randy and Carla Griffin  
Doug and Helen Hatridge  
Liesl Hays  
Hillcrest Transitional Housing  
Steve and Joan Israelite/David and  
Connie Ross  
Jackson County Public Water Supply  
District No. 2  
Larson Lawn Service, Inc.  
Allen and Barbara Lefko in honor of  
Doug and Helen Hatridge  
"Love Y'all LGBTQ+ Small Group"  
David and Connie Mayta  
McClain Restaurant Group, Inc.  
Meinershagen & Co. LLC  
Metropolitan Community College  
Steve and Marianne Noll

## PATRON SPONSORS - \$3,500

Cargo Largo  
Evans & Steele Financial  
Phil and Cindy Foster  
Gilmore & Bell  
NorthPoint Development  
Stewardship Capital, Ltd.  
Turner Construction Company

Dr. Charles Orth and Dr. Beth E. Rosemergey  
Chris and Stacey Payne  
Bill and Deanna Price (YAC Table)  
Raytown Area Chamber of Commerce  
Republic Services  
John and Karen Schuler  
Spire, Inc.  
Stepp & Rothwell, Inc.  
Sue Frank Insurance Agency, Inc.  
Dennis Taylor and Dr. Bridget McCandless/  
Brent Schondelmeyer and Lee Williams  
Allan and Karen Thompson  
University of Central Missouri  
Van Horn Class of 74  
Wayside Waifs, Inc.  
R. Dyan Zimmerman and Oswald Rew LLC

## FRIEND SPONSORS - \$500+

Central Bank of the Midwest  
Commerce Bank  
Community of Christ  
Country Club Bank  
Dr. Ryan Crider  
Stan and Michele Crumbaugh  
Vicki Digby  
Emerick & Company, P.C.  
Chuck and Colleen Foudree  
Mark Foudree

Henks Financial Group  
Mike and Joy Hobick  
David and Lydia Jeter  
Junior Service League of Independence  
John and Nancy Kimak  
George and Ronna Koeppe  
Mother's Refuge  
Raytown Education Foundation  
Dennis and Dr. Beth Savidge  
Lyle and Grace Shaver

Terry and Betty Snapp  
Jim and Mary Stilley Jr.  
The Purple Guys  
The Vaile Mansion  
Thomas McGee Group  
Jody and Dr. Mike Watkins  
Bob and Candy White  
David and Shirley Wurth

## MEDIA SPONSORS



# DONOR ADVISED FUNDS

## Connecting Charitable People with Smart Giving

### Empower Your Giving

Open a Donor Advised Fund (DAF) at our Community Foundation and transform your charitable giving into a strategic, tax-smart investment. With a DAF, you can schedule your gifts, enjoy tax benefits, and watch your contributions grow—all while making a lasting impact in Eastern Jackson County.

### WHY CHOOSE A DONOR ADVISED FUND?

**Adds Strategy to Your Giving:** Make a gift today and make grants tomorrow. Donor advised funds are a great way to enjoy the tax benefits of giving today while planning to support the charities that are closest to your heart throughout the future.

**Convenience:** Donors have all of their giving records in one place. During tax season, donors find that there is no hassle, they receive quarterly statements, and all of their gifts are recorded and easy to review.

**Flexible Giving:** Donate cash, appreciated securities, real estate, and more.

**Family Involvement:** Engage multiple generations in your personal charitable mission and plan your charitable legacy with them as well.

**Expert Guidance:** Receive personalized advice on grantmaking and planning your personal charitable legacy from Community Foundation Staff.

Donors make gifts and receive the tax benefits of giving when the timing is best for them, and can make grants to the charities they support at a later date or automatically over time.

### HOW IT WORKS

Our Donor Advised Fund (DAF) program is a flexible giving account that allows donors to distribute assets year-round while building lasting legacies. With a minimum gift of \$5,000, donors can establish named family funds and join a network of local philanthropists, making a meaningful impact with every contribution.

### MAKING OUR COMMUNITY STRONGER

As a Community Foundation our focus is on Eastern Jackson and Cass Counties. As part of our mission, we educate donors about the non-profit organizations that serve our communities, however, the donors who partner with us are welcome to make gifts to support the regional, national, and international causes that are closest to their hearts.

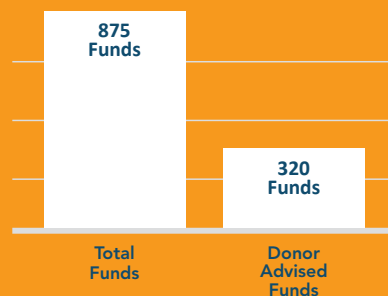
For more details, contact Cole Eason at [eason@thcf.org](mailto:eason@thcf.org).

### WAYS TO CONTRIBUTE TO A DONOR ADVISED FUND

- CASH
- SECURITIES
- LIFE INSURANCE
- BEQUESTS
- CHARITABLE TRUSTS

#### DONOR ADVISED FUNDS BY THE NUMBERS

Our DAF program is growing steadily and makes up nearly 40% of our total fund accounts.



#### COMMUNITY IMPACT

DAF grants awarded in 2024

**1,803**

Totaling

**\$4.5M**

up 70%  
in 3  
years!



# PROFESSIONAL ADVISOR PROGRAM

## Connecting Advisors with Expertise in Charitable Giving

Partnering with THCF provides advisors with expert philanthropic guidance in Eastern Jackson and Cass Counties, helping their clients achieve their charitable giving goals.

### WE SPECIALIZE IN WORKING WITH PROFESSIONAL ADVISORS:

- Financial Advisors
- Trust and Estate Attorneys
- Accountants
- Trust Officers



### CONNECTING ADVISORS WITH CONTINUING EDUCATION

Each year, we host Fall and Spring Seminars to equip advisors with valuable insights to better serve their clients. Thank you to our expert guest speakers for sharing their guidance this year!

#### Spring Seminar

May 9, 2024

**Leaving a Legacy:** Donor Advised Funds & Private Foundations

**You've Been Served:** Top Ten Questions for Inheritance Beneficiaries and Their Advisors in Litigation Cases

**Guest Speakers:** Joseph D. Growney JD and Justin W. Whitney JD, Lathrop GPM LLP

#### Fall Seminar

October 24, 2024

**Navigating the Estate Planning Maze:** Strategies for Today's Advisors

**Guest Speaker:** Brandon Oldham, JD | Kirkland Woods & Martinsen LLP



Joseph D. Growney, JD  
Lathrop GPM LLP



Justin W. Whitney, JD  
Lathrop GPM LLP



Brandon Oldham, JD  
Kirkland Woods & Martinsen LLP

### BENEFITS OF PARTNERING WITH US



Financial advisors may continue to manage the investments for the funds their clients create, even after they have passed away.



We provide expert guidance on local giving to maximize impact where it matters most.



Clients can establish endowments for legacy giving while keeping assets under advisor management.



Advisors can help clients avoid capital gains taxes by donating appreciated securities instead of cash.



Clients join a community of like-minded donors while advisors retain asset management.



Pooled donations increase impact, giving clients greater fulfillment in their charitable giving.

# 2024 GRANTS PROGRAM

## Connecting Local Nonprofits with Crucial Resources

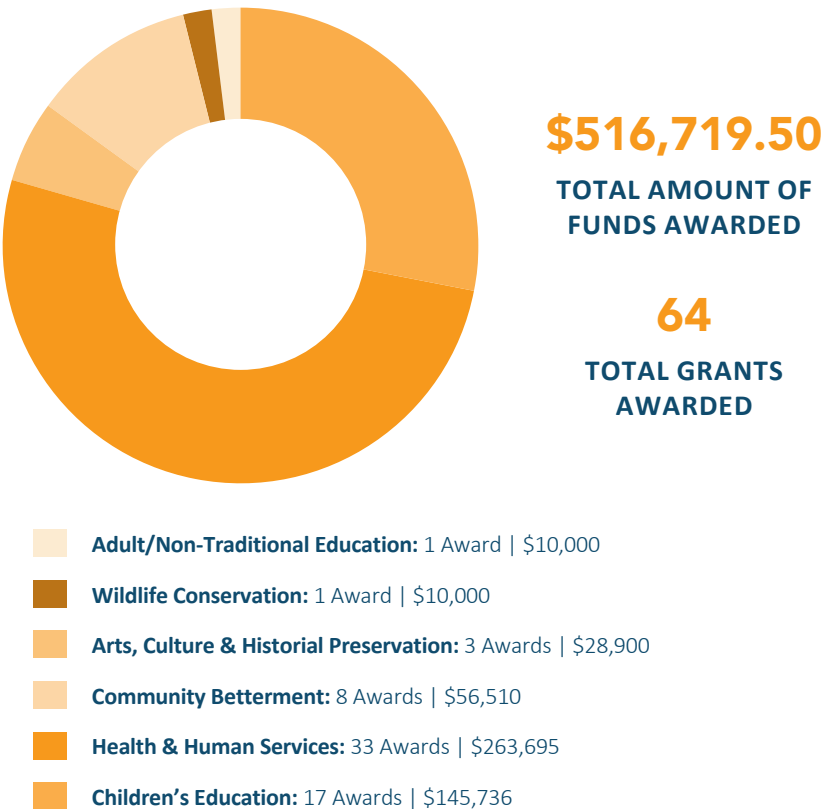
Our Grants Program is made possible primarily by funds set up by donor bequests and wills, as well as Donor Advised Funds. We invest in nonprofits, city governments, and/or schools that strive to improve the lives of people living, working, and serving in suburban Kansas City, Eastern Jackson and Cass County communities.

### THCF COMPETITIVE GRANTS PROGRAM

Truman Heartland Community Foundation manages two types of grant programs:

COMMUNITY GRANTS	JELLEY FAMILY FOUNDATION FOR EDUCATION
Adult/Non Traditional Education Wildlife Conservation Arts/Culture and Historic Preservation Community Betterment Health & Human Services	Children’s Education

### 2024 GRANTS BY THE NUMBERS



### COMPETITIVE GRANTS APPLICATION PROCESS

Our Competitive Grants Program application process takes place annually during January through March. Proposals are submitted through our online portal, and then our Grants Committee and Youth Advisory Council work for several months to evaluate grants and determine awards. Grant awards are announced June through October, pending board approval.

#### MIDWEST PUBLIC RISK

##### Grants Workshop

February 8, 2024

This was open to the public with free registration. This workshop helped nonprofits navigate our online portal, learn best practices for writing grants, and make sure they are positioned to represent themselves effectively throughout our application process.

#### ADAMS POINTE CONFERENCE CENTER

##### Annual Grants Luncheon

November 14, 2024

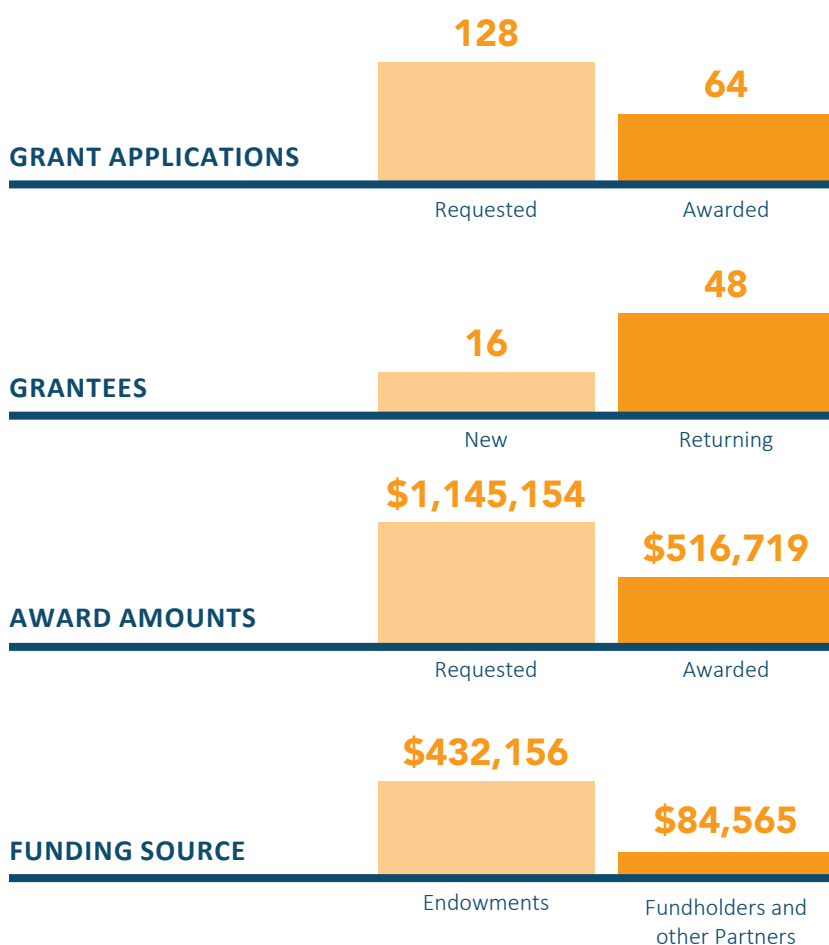
Awards were distributed at the Annual Grants Luncheon in mid-November, when our Grantees were celebrated for the positive work they do within our communities. We also celebrated our new Legacy Society Members.



### LAUNCHING A GRANTMAKING FUND

There are 23 endowments that provide funds for our competitive grants process. Most were created through generous gifts that community members made through their estate to create endowed funds to support charitable organizations.

## COMPETITIVE GRANTS PROGRAM BY THE NUMBERS



THANK YOU TO OUR GRANTS  
LUNCHEON SPONSOR:



## THE 2024 OUTREACH GOALS WERE ACHIEVED

**Focus on Cass County**  
Awards to agencies who are located in, or have programs in, Cass County grew to 11 agencies and more than \$40,000.

**Focus on New Grantees**  
The Grants Committee made the recommendation of 10% of available funds be awarded to new grantees (an agency who had never previously received funding from our grants program). The goal was exceeded by 110%, and they gave 22% to new agencies in our area.



## THANK YOU TO THE GENEROUS FUNDHOLDERS WHO MADE CONTRIBUTIONS TO OUR COMPETITIVE GRANTS PROGRAM

### Endowed Funds | Totaling \$432,156

Big Piney Fund for Social Ministry  
James D. Browning Endowment Fund  
Beverly A. Cathcard Charitable Endowment  
Cultural Arts Coalition Endowment for the Arts  
Samuel W. Edmunds Grantmaking Fund  
Alece Ellis Competitive Grants Fund  
Family Literacy Endowment Fund  
Willa L. Fancher and Martha A. Taggart Endowment  
Heartland Arts Alliance Fund  
Margaret E. Hurt Endowment Fund  
IRHC Community Service Fund  
Jelley Family Foundation Fund  
Richard and Esther McCall Endowment for Community Needs  
Zita McGraw Endowment for Missouri Wildlife Conservation  
Homer McWilliams Oncology Fund  
Marcella Morgan Oncology Fund  
Marjorie Pollard Hospice Fund  
Clarence and Betty Stowell Family Foundation Endowment  
Truman Heartland Community Grantmaking Fund  
THCF Health-related Project Fund

### Additional Funds from THCF Fundholders and Partners | Totaling \$84,565

Bill and Darleen Barnes Charitable Fund  
Darren Brungardt Charitable Foundation Fund  
Cavanah Family Fund  
Wayne Feuerborn Family Fund  
Linda and Mike Gerding Family Fund  
Randy and Carla Griffin Family Foundation Fund  
HMF Beaudoin Family Foundation  
Douglas G. and Helen Ann Hatridge Family Foundation Fund  
Tina and Bryan Hughes Fund  
Junior Service League - Community Trust Savings Fund  
Make a Difference Fund  
David and Connie Mayta Charitable Fund  
Melanie Moentmann Charitable Fund  
Prevost Family Foundation  
Brenda West  
Wray Family Charitable Fund  
Lenora "Lennie" Wyre Charitable Fund  
Youth Advisory Council Endowment Fund

### IN MEMORY OF

## *Dave Mayta*

Dave Mayta, a dedicated member of the THCF Board of Directors and the Independence Advisory Board, has left an indelible mark on our community. His tireless service and unwavering commitment have positively impacted countless lives. From his involvement in various committees to his pivotal role on the Grants Committee, Dave's commitment to uplifting others has been truly remarkable. His extensive volunteer work in the Kansas City Metro area and his contributions to numerous organizations have left a legacy of compassion and service. This summer, Dave passed away, but his name will forever be associated with the buildings and institutions he helped to nurture, reflecting his enduring impact on our community. For this reason, the 2024 Annual Grants Luncheon was dedicated in his memory.



## JELLEY FAMILY FOUNDATION ENDOWMENT FOR CHILDREN'S EDUCATION GRANT AWARDS

These grant awards focus on educational initiatives for children, ranging from early childhood through traditional post-secondary education.

### CHILDREN'S EDUCATION

#### Belton Educational Foundation

\$10,000.00

Funds will support students who are enrolled at Belton High School who need financial assistance with Advance Placement tests and dual credit course fees.

#### BikeWalkKC

\$7,500.00

Funds will support Safe Routes to School, bicycle and pedestrian safety classes for the students in Eastern Jackson County schools.

#### Camp Encourage

\$5,500.00

Funds will support general operations and mission to provide youth on the autism spectrum meaningful experiences in which they build the knowledge, courage, and skills to be empowered participants in the community.

#### Drumm Farm Center for Children, Inc.

\$10,000.00

Funds will support COMPASS and New Beginnings Programs, Educational, and Job Readiness Support, helping young adults attain lifelong success and achieve their goals.

#### Englewood Arts

\$10,000.00

Funds will support the Summer Arts Camp for ages seven to teens. Camp will focus on a variety of art forms and topics.

#### Gift of Life, Inc.

\$7,500

Funds will support general operations and support the awareness and success of organ, eye and tissue donation through education, mentoring and the collaboration with partners and individuals in the transplant community.  
>> *Additional funding: Wray Family Charitable Fund*

#### HorsePower Experiential Learning Program

\$10,000.00

Funds will support the Instructor Training Program and is designed to increase the number of qualified instructors to help meet the needs of the agency.

#### Junior Achievement of Middle America, Inc.

\$10,000.00

Funds will support Access to Experiential & Real-World Learning Opportunities via BizTown to Raytown and Ft. Osage students.

#### Music/Arts Institute

\$10,000.00

Funds will support financial assistance for music lessons to talented students in Eastern Jackson County who are a part of the Young MAIsterSingers Choir.

#### NorthWest Communities Development

Corporation

\$7,118.25

Funds will support Fairmount Kids. A program which provides a fun and safe place for students as they learn social skills, improve their academics, and discover other generations.

#### Paws & Pals

\$10,500

Funds will support P.A.W.S. (Pawsitive Actions make Wise Students) An animal assisted school based Social Emotional Learning Prevention program which focuses on mental health.

>> *Additional funding: Tina and Bryan Hughes Fund & HMF Beaudoin Family Foundation*

#### Peace Partnership

\$7,618.25

Funds will support general operations and mission to help financially disadvantaged children, adults, and families successfully understand and overcome life's complexities through honest and sincere relationships.

>> *Additional funding: Tina and Bryan Hughes Fund*

#### Pro Deo Youth Center

\$10,000.00

Funds will support our activities fees, snacks, incentives, and transportation costs. Eliminating barriers, and allowing teens to participate in our healthy lifestyles program.

#### Puppetry Arts Institute

\$5,000.00

Funds will support the Independence School District's kindergarten field trips to PAI. Helping enhance a child's communication and creative arts skills through puppetry.

#### Reach Out and Read Kansas City

\$10,000.00

Funds will support Kindergarten readiness, by providing culturally appropriate books to doctors and nurses for children ages 0-5, aiding in developmental assessment and parental involvement.

#### School of Economics

\$10,000.00

Funds will support the 2025 Marketplace's resources and supplies, including field trip experiences for 700 students at the Blue Springs location.



#### The Aidan Project

\$5,000.00

Funds will support the Early Intervention Access program for children with developmental delays, birth to age six. Linking families with service providers.

## COMMUNITY GRANT AWARDS

These grant awards target agencies and missions in the following categories:

**Adult/Non-Traditional Education; Wildlife Conservation; Arts, Culture, and Historic Preservation; Community Betterment, and Health and Human Services.**

### ADULT/NON-TRADITIONAL EDUCATION

#### Pawsperty

\$10,000.00

Funds will support the Unleashing Human Potential Through Pet Care program that includes Pre-Stability, Job Training and Placement and Bridge Employment Support.  
>> *Additional funding: Junior Service League & David and Connie Mayta Charitable Fund*

### WILDLIFE CONSERVATION

#### Wild Souls Wildlife Rescue and Rehabilitation

\$10,000.00

Funds will support general operations and mission to rehabilitate wildlife and provide a free public service to humanely rescue, rehabilitate and release native wildlife mammals & Federally Protected Birds of Prey.  
>> *Additional Funding: David and Connie Mayta Charitable Fund & Cavanah Family Fund*

## ARTS, CULTURE AND HISTORIC PRESERVATION

### Friends of the Rice-Tremonti Home Association

\$6,400.00

Funds will support general operations and mission to restore and preserve the house built in 1844, and promote the history of the Santa Fe, Oregon, and California Trails.

>> *Additional funding: Linda and Mike Gerding Family Fund*

### Lee's Summit Symphony

\$7,000.00

Funds will support general operations and mission to provide excellent musical experiences that enhance the quality of life for the community.

### Victorian Society of the Vaile Mansion

\$15,500.00

Funds will support the South Porch Restoration project of the mansion, maintaining the historic integrity of the site.

>> *Additional funding: Anonymous & David and Connie Mayta Charitable Fund*

## COMMUNITY BETTERMENT

### Band of Angels

\$9,000.00

Funds will support the musical instrument donation program to students in Eastern Jackson County schools.

>> *Additional funding: Bill and Darleen Barnes Charitable Fund & HMF Beaudoin Family Foundation*

### HopeBUILDERS Home Repair

\$8,000.00

Funds will support the Accessibility and Home Repair Program available to low-income families in Eastern Jackson County communities.

>> *Additional funding: Junior Service League & David and Connie Mayta Charitable Fund*



### Independence Youth Court

\$13,000.00

Funds will support general operations and mission to provide peer-led restorative justice to at-risk juveniles encountering the criminal justice system.

>> *Additional funding: Junior Service League, Cavanah Family Fund, Douglas G. and Helen Ann Hatridge Family Foundation Fund, Bill and Darleen Barnes Charitable Fund & Tina and Bryan Hughes Fund*

### Legacy for Lee's Summit Parks Foundation

\$2,500.00

Funds will support Community Hands Only CPR Training, to learn the essentials of hands free (non-certified) CPR techniques, as well as other potentially life-saving emergency medical skills.

### Oak Grove School District

\$5,010.00

Funds will support the Webb Pond Trail Connector project designed to enhance community connectivity and safety, creating a secure pathway for students commuting to school.

>> *Additional funding: HMF Beaudoin Family Foundation*

### Rebuilding Together Kansas City

\$6,000.00

Funds will support the Safe at Home program that provides necessary repairs and safety modifications so vulnerable populations can remain securely in their homes.

### River Community Pool

\$5,000.00

Funds will support repairs at the pool, including replacing diving board, skimmer leak and concrete walkways.

### Truman Heritage Habitat for Humanity, Inc.

\$8,000.00

Funds will support the Aging in Place program, which is a comprehensive program that enables older adults to remain in their homes and take advantage of health, social and other programs in the community.

>> *Additional funding: Brenda West, Tina and Bryan Hughes Fund, & David and Connie Mayta Charitable Fund*

## HEALTH AND HUMAN SERVICES

### After the Harvest

\$4,000.00

Funds will support providing fresh produce directly from farm partners in Rich Hill, MO to food-insecure residents in Cass County.

### Bright Futures Harrisonville

\$8,000.00

Funds will support Harrisonville's food assistance programs, both Food4Thought and Just4Me. Aiming to bring food stability to all of Harrisonville's youth.

>> *Additional funding: Darren Brungardt Charitable Foundation Fund*

### Cancer Action, Inc.

\$6,000.00

Funds will support the Nutritional Supplements and Gas Card Assistance Program which helps those with cancer.

>> *Additional funding: Bill and Darleen Barnes Charitable Fund & Brenda West*

### Cass Community Health Foundation

\$8,000.00

Funds will support the Cass County Dental Clinic's school-based tele-dentistry program.

### Child Abuse Prevention Association

\$7,000.00

Funds will support critical mental health counseling at low to no cost for those who have experienced violence, abuse, and/or neglect.

>> *Additional funding: Douglas G. and Helen Ann Hatridge Family Foundation Fund & Wray Family Charitable Fund*

### Coldwater of Lee's Summit

\$8,000.00

Funds will support the Little Blessings Diaper Distribution Program, which helps low-income families.

### Community Services League

\$10,000.00

Funds will support the Hispanic Food Boxes program, which helps meet the need for familiar, desirable, nutritious food for Hispanic residents.

>> *Additional funding: Douglas G. and Helen Ann Hatridge Family Foundation Fund, McCandless Family Fund & Tina and Bryan Hughes Fund*

### Developing Potential

\$12,706

Funds will support new curricula and supplies to help those with developmental disabilities meet their personal development goals.

>> *Additional funding: David and Connie Mayta Charitable Fund & HMF Beaudoin Family Foundation*

### Eagles Community Outreach

\$4,000.00

Funds will support the Client Choice Food Pantry along with clothing, hygiene products, cleaning products, birthday items for kids 12 and under, a Christmas store, and Back-to-School supplies.

### Flourish Furniture Bank

\$10,000.00

Funds will support general operations and mission to improve lives by providing essential home furnishings and houseware to those seeking housing stability.

>> *Additional funding: Cavanah Family Fund*

### Gilda's Club Kansas City

\$4,700.00

Funds will support cancer patients and caregivers to be able to attend support groups free of charge.

>> *Additional funding: Wray Family Charitable Fund*

**Giving the Basics, Inc.**

\$10,000.00

Funds will support the School Free Hygiene Program that provides all types of products to Eastern Jackson County schools and students.

>> *Additional funding: Bill and Darleen Barnes Charitable Fund*

**Goodwill of Western Missouri and Eastern Kansas**

\$4,000.00

Funds will support reentry services to individuals in Cass County who are released from incarceration. They will receive wraparound support, employment, and case management to ensure they don't recidivate.

**Hillcrest Transitional Housing**

\$26,000.00

Funds will support the Youth Transitional Living program in Independence. The program improves the mental and social-emotional well-being of youth, while rebuilding self-sustainability.

>> *Additional funding by: Anonymous, Darren Brungardt Charitable Foundation Fund & Randy and Carla Griffin Family Foundation Fund*

**Hope House, Inc.**

\$10,000.00

Funds will support general operations and mission to break the cycle of domestic violence by providing safe refuge and supportive services that educate and empower those impacted by domestic violence.

**Hope Network of Raytown**

\$9,000.00

Funds will support general operations and mission to offer hope to the hungry and hurting by delivering exemplary care, affirming value, and meeting basic needs.

**Independence Meals On Wheels, Inc.**

\$11,000.00

Funds will support the Meal Subsidy Relief program that serves meals to residents in Independence and Sugar Creek.

>> *Additional funding: Melanie Moentmann Charitable Fund & Cavanah Family Fund*

**Jackson County CASA**

\$4,500.00

Funds will support general operations and mission to be a child's voice in court for children who have experienced abuse and neglect.

>> *Additional funding: Darren Brungardt Charitable Foundation Fund & Prevost Family Foundation*

**Job One**

\$5,000.00

Funds will support the transformation of the Independence location by softening and enlivening the space by adding plants, art, softer surfaces, and sound absorbing panels.

**Marian Hope**

\$5,363.00

Funds will support the purchase of technology resources that enhance intervention strategies and goal achievement. The technology will be utilized across all its program services.

>> *Additional funding: Junior Service League and the Youth Advisory Council Endowment Fund*

**Meals on Wheels of Lee's Summit, Inc.**

\$9,163.00

Funds will support the Meal Subsidy program that serves meals to residents in Lee's Summit.

>> *Additional funding: Youth Advisory Council Endowment Fund*

**Metropolitan Organization to Counter Sexual Assault**

\$5,000.00

Funds will support general operations and mission to improve the lives of those impacted by sexual abuse and assault and prevent sexual violence in the community.

*Additional funding: Bill and Darleen Barnes Charitable Fund*

**Mother's Refuge**

\$11,000.00

Funds will support general operations and mission to shelter and educate homeless, pregnant, and parenting young women by providing comprehensive services that empowers them to make successful life decisions.

>> *Additional funding: Wayne Feuerborn Family Fund & Darren Brungardt Charitable Foundation Fund*

**Necessity Pantry at St. Michaels Episcopal Church**

\$8,000.00

Funds will support the pantry that provides basic personal care items and ensure those items are available to distribute on a regular basis.

>> *Additional funding: Make a Difference Fund & Cavanah Family Fund*

**Raymore-Peculiar Public-School Foundation**

\$7,000.00

Funds will support the Care About Nutrition program that provides healthy and child-friendly foods to students.

**Raytown Emergency Assistance Program - REAP**

\$8,200.00

Funds will support the Holiday Assistance Program that helps families with Thanksgiving meals, Christmas gifts, or Christmas meals.

>> *Additional funding: Linda and Mike Gerding Family Fund & Darren Brungardt Charitable Foundation Fund*

**Raytown Summer Lunch Ministry**

\$5,200.00

Funds will support the mobile food pantry style program that provides bags of groceries to families for 11 weeks in the summertime.

>> *Additional funding: Linda and Mike Gerding Family Fund*

**River of Refuge**

\$5,000.00

Funds will support general operations and mission to empower working poor families with financial security through interim housing.

>> *Additional funding: HMF Beaudoin Family Foundation*

**Sleep in Heavenly Peace, Inc - MO - Kansas City, SE**

\$9,363.00

Funds will support purchasing materials for a Community Bunk Bed Build Day that produces 40-60 beds in 2 to 4 hours.

>> *Additional funding: Youth Advisory Council Endowment Fund*

**The Child Protection Center, Inc.**

\$4,000.00

Funds will support general operations and mission to build a healthier community by leading the multidisciplinary response to the prevention, identification, and treatment of child abuse and violence.

**The Salvation Army - Crossroad Shelter**

\$7,500.00

Funds will support the Crossroads Family Shelter that uses a holistic approach and comprehensive support services to reduce homelessness and tackle the root causes.

>> *Additional funding: HMF Beaudoin Family Foundation & Prevost Family Foundation*

**TNC Community**

\$10,000.00

Funds will support customized in-home care for adults with Intellectual Developmentally Disabilities who need around-the-clock support.

>> *Additional funding: Brenda West*

**Welcome Wellness Health Education Resource Center**

\$7,000.00

Funds will support general operations and mission to serve the community and develop creative solutions to meet individuals where they are on their health journey.

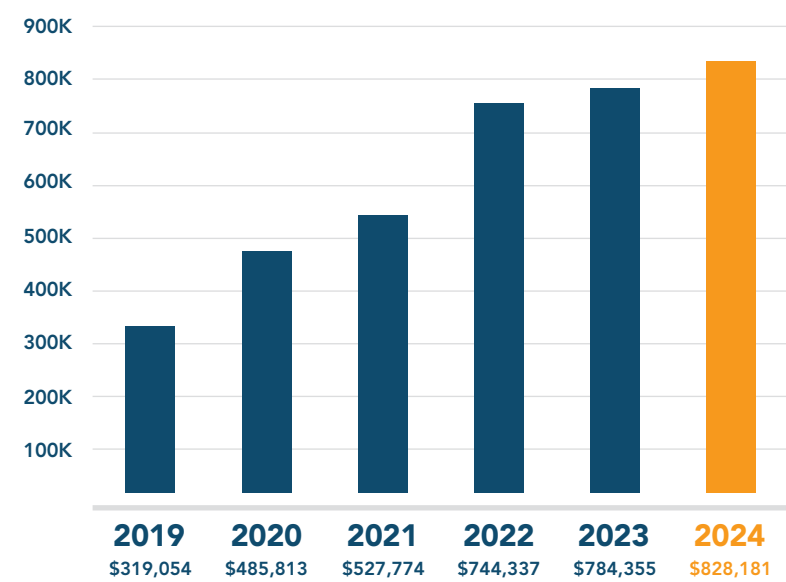


# SCHOLARSHIP PROGRAM

## Connecting Students to their Future

Since 1982, our fundholders have awarded over \$7.5 million in scholarships, empowering students to pursue higher education. Their generosity and commitment to education create a brighter future for our entire community. Together, we continue to support students in Eastern Jackson County and beyond.

### SCHOLARSHIPS AWARDED SINCE 2019



**\$7.5M+ AWARDED SINCE 1982**



### 2024 SCHOLARSHIPS BY THE NUMBERS

Truman Heartland Community Foundation holds over 170 scholarship funds to help students follow their dreams and work toward a brighter future.

#### GENEROSITY

**\$828,181**  
TOTAL AWARDED

**173**  
FUNDS CONTRIBUTING

#### IMPACT

**461**  
SCHOLARSHIPS AWARDED

**334**  
STUDENTS SERVED

#### PROCESSES

**409**  
REVIEWERS

**2,271**  
APPLICATIONS RECEIVED

## HOW OUR FUNDHOLDERS CREATE SCHOLARSHIP FUNDS

A scholarship fund starts with a \$25,000+ gift to Truman Heartland, which can be cash, securities, real estate, a qualified charitable distribution from an IRA,, or other assets. Funders can choose to award scholarships through a customized Advisory Committee or the Truman Heartland Scholarship Committee.

## HOW OUR STUDENTS APPLY FOR SCHOLARSHIPS

### GENERAL APPLICATION

The General Application is the first step in applying for over 50 scholarships they might be eligible for. To begin the process, they submit just one easy General Application to get matched with the individual scholarships they qualify for.

### STAND ALONE APPLICATIONS

Some of our scholarships are not included in the general application and must be submitted separately.

### SCHOOL DISTRICT APPLICATIONS

We are proud to partner with a number of local education foundations in administering their scholarship awards.

*Students apply through our online portal. The majority of our scholarship applications are due in February, and most award announcements are made by May each year.*

## KATIE AMEKU - RHODES SCHOLAR

## EMPOWERED BY HER COMMUNITY | A SCHOLARSHIP STORY

Independence student Katie Ameku is a THCF Scholarship recipient, receiving 7 total scholarships throughout her 4-year college education, from 2021-2024, at Coe College in Iowa. These scholarships afforded her the freedom to spend precious time in math and physics research, including traveling during summers for advanced programs at institutions including University of Pennsylvania and Georgia Tech.

The combination of her academic research, political action, and community service have led her to become 1 of 32 American students in 2024 to receive the coveted Rhodes Scholarship. She'll be moving to the United Kingdom in October 2025 for three years of fully-funded study at Oxford University in England.

She received THCF scholarships from the Norman and Mary Anne Davidson Scholarship Fund, the Gene and Joanne Cable Scholarship, and the Sam and Lindsey Porter Scholarship.



# 2024 SCHOLARSHIP FUNDS

## GENERAL SCHOLARSHIPS

Cpl. Benjamin Ashley Memorial Scholarship  
Association for Industrial Development Scholarship  
Mary K. Axtell Scholarship  
Pat Barnhard Memorial Scholarship  
John S. Barrett Memorial Scholarship  
Blue Springs Rotary Club Scholarship  
Daniel L. Bodas Technical Scholarship  
Josh Borgmeyer Memorial Scholarship  
John Bowser Radiology Scholarship  
Steven D. Brown Scholarship  
Ron Bruch Nursing Scholarship  
Gene Cable Automotive Scholarship  
Gene and Joanne Cable Scholarship  
Centerpoint Medical Center Auxiliary Scholarship  
Centerpoint Medical Staff Scholarship  
Council of Clubs of Greater Kansas City Scholarship  
David A. Cromwell Memorial Scholarship  
Norman and Mary Anne Davidson Scholarship  
Opal Barker Day and Phyllis Day Combest Memorial Scholarship  
Senator Ronnie DePasco Scholarship  
Glenda K. Dowler Memorial Scholarship  
Kay and Morris Dunning Nursing Scholarship  
Eastern Jackson County Bar Association Thomas Locke Scholarship  
Linda Landahl Edison Education Scholarship  
Alece Ellis Scholarship  
William R. Gann Music Scholarship  
Sara Garrett Memorial Scholarship  
Brandon Gieselman Memorial 4-H/FFA Scholarship  
Henri E. Goettel Youth In Philanthropy Award  
Greater Kansas City Association of Family and Consumer Sciences Scholarship  
Heart of a Tiger Scholarship  
Rachel House Hudson Memorial Scholarship  
Norm and Linda Humphrey Scholarship  
David Hurt Memorial Scholarship  
Independence Young Matrons Scholarship  
Jackson County Columbian Homes Association Knights of Columbus Council 3430 Legacy Scholarship Fund



Jackson County Columbian Homes Association Knights of Columbus Council 3430 Legacy Scholarship in Honor of Fr. Bob Stone Fund  
Johnston Family Scholarship  
Chuck & Jeneen Jones Scholarship  
Jovial Scholarship  
Junior Service League Bess Wallace Truman Scholarship  
Kansas City Hospice Pamela Puppe Patient Care Scholarship  
Harry & Connie Katowitz Memorial Scholarship  
Emily Kirk Memorial Scholarship  
Gregory A. Knapp Train Your Brain Scholarship  
Blair Michaela Shanahan Lane Memorial Scholarship  
William Lueckenhoff Memorial Scholarship  
Lutz Family Scholarship  
Mary (Mimi) Lynch Scholarship  
Julie Elizabeth Marshall Memorial Scholarship  
Forrest and Marjorie Martin Scholarship  
Elizabeth Hill McClure Scholarship  
McMillin Family Scholarship  
Jay McNamara Memorial Scholarship  
Medical Alliance-Metropolitan Medical Society of GKC Scholarship  
Mid-Continent Public Library James A. Leathers Scholarship  
Stella Moran Memorial Scholarship  
Edward L. and Helen L. Newlin Scholarship  
Georgia B. Northway Hemophilia Scholarship  
Olson Student Assistance Scholarship  
George and Ellen Jane Petrie Scholarship  
Plaza Heights Academy Scholarship  
Sam and Lindsey Porter Scholarship  
Rolfe Bridge Scholarship  
Eugene J. Rolfe Memorial Scholarships

Christopher Michael Rose Scholarship  
Rotary Club of Eastern Independence Scholarship  
Jim Scheerer Memorial Scholarship  
Harold H., Norma J. & James Allan (Jimmy) Schmidt Scholarship  
Seger Family Nursing Scholarship  
The Signatry - Walters-Magee Scholarship  
Vern and Ruthel Sinclair Memorial Scholarship  
Sixth Bomb Group Memorial Scholarship  
Mark Stanke Memorial Scholarship  
Laura G. Stark Memorial Scholarship  
The Therese Stegner (Piper) Memorial Scholarship  
Jason Stone Creativity Scholarship  
Sugar Creek Business and Civic Club Scholarship  
City of Sugar Creek Norman and Mary Anne Davidson Scholarship  
Bill Summa Scholarship  
Elizabeth Weekley Sutton Scholarship  
Rose Mary Thompson Scholarship  
The Toni Thornton AAUW Reentry Scholarship  
Tile Contractors' Association of America, Inc. Scholarship  
Timothy Lutheran - William P. Gerike Scholarship  
Timothy Lutheran - Theodore V. Schubkegel Scholarship  
Timothy Lutheran - Betty Wilson Scholarship  
Vita M. Totta Memorial Scholarship  
Venable Scholarship  
Watkins Family Harbinger Scholarship  
The Brenda Rapp West Scholarship  
William Chrisman Class of 1953 Scholarship  
Phillip Zaroor Entrepreneurial Scholarship



## EDUCATION FOUNDATION SCHOLARSHIPS

**These scholarships are determined by the Education Foundations from the school districts they are associated with.**

### Alpha Iota Educational Foundation

Dr. Richard (Dick) Miller Scholarship Fund  
Richard (Rich) & Ruth Swanson Memorial Scholarship

### Drexel Public School Foundation

William D. Gordon Memorial Endowment Fund  
William D. Gordon Memorial Non Endowed Scholarship Fund  
James H. Phillips Memorial Endowed Scholarship Fund

### Fort Osage Resources Champion Education (FORCE) Scholarships

Dr. Gale T. Bartow Scholarship  
Mary Beggs Science Education Scholarship  
Arthur Butler Scholarship Fund  
Julie Cato Memorial Scholarship  
Vilas 'Lee' Compton Memorial Scholarship Fund  
Daughters of the American Revolution  
Louann Dickmeyer Educational Scholarship Fund  
Dr. Mark Enderle Scholarship  
Dr. Larry Ewing Scholarship  
Michael Brandon Fisher Memorial Scholarship  
Ft. Osage Resources Champion Education Fund  
Fort Osage R-1 Scholarship Foundation General Fund  
FOSD Employee Scholarship Fund  
Fort Osage Leadership Fund  
J. Richard Franklin Scholarship Fund  
Jimmy Golden Memorial Softball Scholarship Fund  
Dr. Victor D. Gragg Scholarship Fund  
Gragg Memorial Scholarship Fund  
Leo A. and Linda Gussman Scholarship Fund  
Dr. Paul James Scholarship  
Robert Keeton Scholarship Fund  
A. Joan Lovelace Future Educator Scholarship Fund  
Carol Marcks Elementary Education Scholarship Fund

Judy Lee McDaniel-Yazel Scholarship Fund  
Melanie Meyer Memorial Scholarship Fund  
Dustin Payne Scholarship Fund  
Harley & Doris M. Eby Reed Scholarship Fund  
Mona Richardson Scholarship Fund  
Gus Spencer Scholarship Fund  
Connie Truelove Scholarship  
VanDyke-Hephner Scholarship Fund  
John Waldman Memorial Scholarship  
Dr. Ben Whited Scholarship Fund

### Grain Valley School District Foundation

Beebe-Logeman Scholarship Fund  
John Cianciolo Memorial Scholarship Fund  
Erma and Robert Doty Memorial Scholarship Fund  
Fine Arts Program Fund  
Leroy Grubb Memorial Scholarship  
David and Patty Hackett Scholarship  
Mary and Lonnie Harper Speech and Debate Scholarship  
Rachel House Hudson Memorial Scholarship Fund  
Dr. Roy Moss Education Scholarship  
Jerry Mueller Scholarship Fund  
Barbara and Moody Murry Music Scholarship Fund  
Napier Award Memorial Scholarship  
Scholarship Fund  
Sni Valley Academy Scholarship Fund

### Lafayette County C-1 Education Foundation

Richard and Alice Carter Memorial Scholarship  
Richard Carter Memorial Scholarship  
Class of 77 Memorial Scholarship  
Class of 78 Memorial Scholarship  
Classic Shop Scholarship  
Samuel Duncan Memorial Scholarship  
Stephen and Pamela Duncan Scholarship Fund  
Engineering/Technical Scholarship  
Paul Gadt Memorial Scholarship Fund  
Derek W. Gillilan Scholarship  
Lester and Mary Homfeld Endowed Scholarship  
Albert D. Lee Memorial Scholarship  
Joyce Lewis O.E.S. 477 Memorial Scholarship  
Garrett Moore Memorial FFA Scholarship

Bob Pace Scholarship - Lafayette Cnty C-1  
Paula M. Perrine Memorial Scholarship  
Purnell-Scott Family Memorial Scholarship  
Renno Memorial Scholarship  
Jim Richey/Jerry Hopkins Memorial Scholarship  
Forest Riekhof Memorial Scholarship  
Herman & Micky Simmons Memorial Scholarship  
James H. and Doris Jane Stoner Memorial Scholarship  
Ralph Thieman Educational Fund & Earl & Maxine Smarr Scholarship  
Marla Tobin Scholarship

### Oak Grove School District Education Funds

L. Clay Barton Memorial Scholarship Fund  
Oak Grove High School Class of 1967 Scholarship  
Hershel & Mae Cline Scholarship  
Freddie Doherty Memorial Scholarship Fund  
Russell D. And Betty J. Earnshaw Memorial Scholarship  
Hockman Hardware Dual Credit Scholarship Fund  
Dayton House Memorial Scholarship  
Skyelar Kelly Memorial Scholarship  
Krystle Rose Logston Scholarship  
Heather Kay McClain Memorial Scholarship Fund  
Charles & Alma Palette Memorial Scholarship  
Coach Pirch Memorial Scholarship  
Jeremiah Pulley Memorial Scholarship  
Charlene Roscher Memorial Scholarship  
Kenneth & Lois Royer Scholarship  
Tripp Family Scholarship  
Clyde E. Williams Scholarship  
David A. and Barbara J. Yarger Memorial Scholarship

### Raytown Educational Foundation

Aspire Scholarship for Raytown Schools  
Shirley Keisker Memorial Scholarship Fund for Raytown Schools



# HEARTLAND LEGACY SOCIETY

## Connecting Donors to Their Planned Giving Legacy

Heartland Legacy Society members ensure their favorite causes thrive for generations. We proudly honor the 200+ donors committed to leaving a lasting impact.

## PEACE OF MIND FOR YOU & YOUR LEGACY

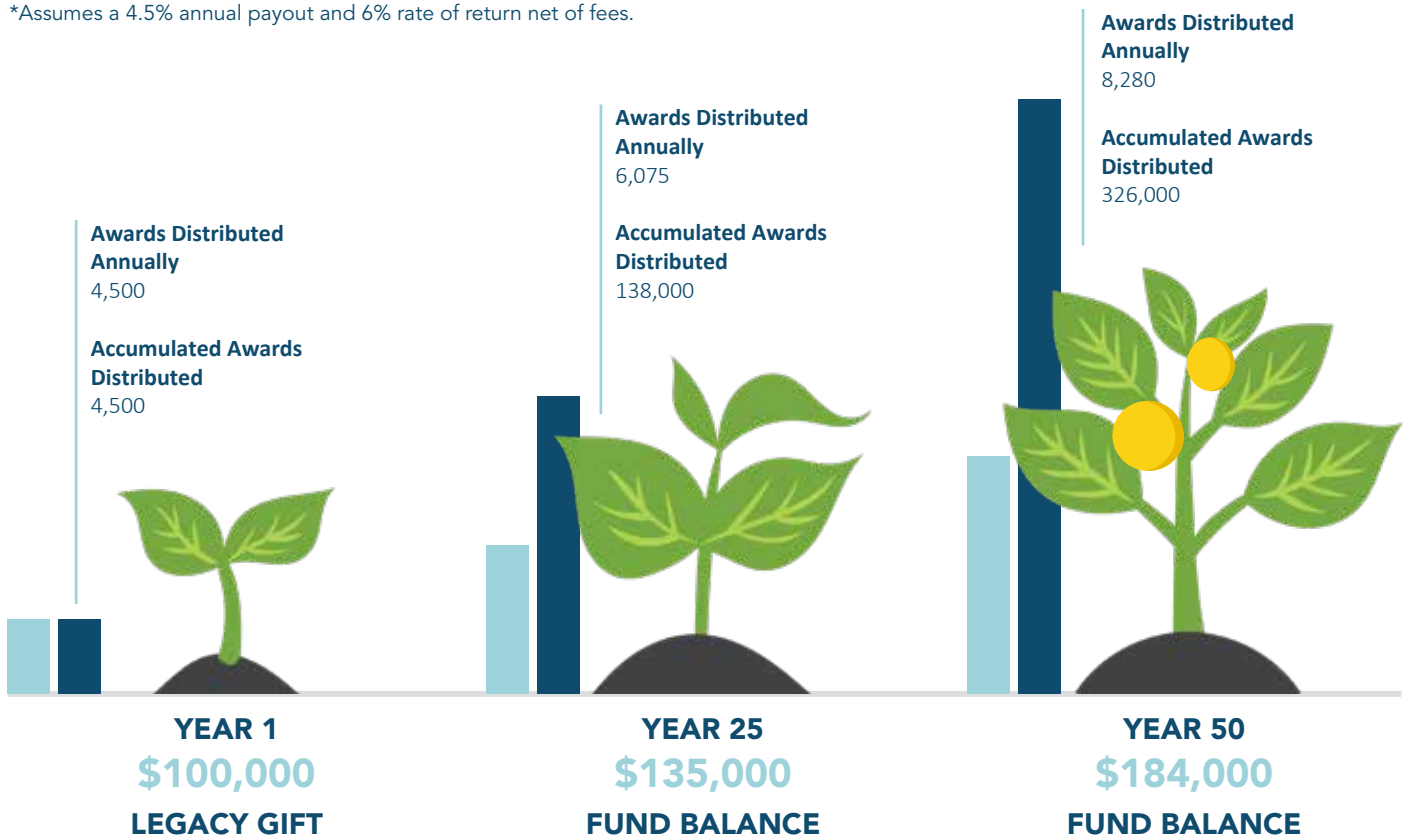
A legacy gift allows you to support loved ones, involve family in future giving, reduce tax burdens, and give back to your community. Gifts to Truman Heartland Community Foundation are estate tax-exempt, maximizing their impact. An endowed legacy gift continues to grow, providing lasting support for the causes you cherish.

## BY THE NUMBERS



## PROJECTED GROWTH\* OF AN ENDOWED FUND

\*Assumes a 4.5% annual payout and 6% rate of return net of fees.



## 2024 HEARTLAND LEGACY SOCIETY MEMBERS

**Thank you for your foresight and dedication as a valued Legacy Society Member. Your commitment ensures the organizations you care about will receive a lasting impact for generations to come.**

### NEW MEMBERS IN 2024

Anonymous - 2  
Sue Frank and Ted Bowman  
Darren Brungardt  
Sharon J. Burton  
Aaron and Jenny Bush  
Brad and Christina Cutcliffe  
Kathleen Halcro  
David Herrera  
Michael and Jill Johnston  
Leslie K. King  
Gary and Diana Pumphrey  
O. Wayne Smith and William T. Stewart (Ted)  
Kathleen Halcro

### MEMBERS

Anonymous - 17  
Leslie B. Anderson  
L. Joseph Arth  
Roger and Jacquelyn Bailey  
Charles and Sally Baldwin  
Mark and Dianne Ballantyne  
Paul and Gail Barham  
Rick Cox and HazelAnn Barkie-Cox  
Bill and Darleen Barnes  
Dwight and Carolyn Barnhard  
Ross and Renata Beaudoin  
Joe and Janice Blackburn  
Larry and Susan Blick  
Daniel L. and Janet Bodas  
Craig and Debbie Bolger  
Richard E. Bowman  
Ron Bruch  
David L. Bush  
Jerry and Donna Carey  
Carol Carpenter  
Richard L. Cates  
Kenneth (Marty) and Cindy Cavanah  
Mary Lou Chalmers  
Wayne and Stephanie Chipman  
Byron Constance  
Larry and Wanda Cook  
J.D. and Jeanne Cooper  
John and Melanie Courtney  
Stan and Michele Crumbaugh  
Vicki Digby  
Sam and Vera Douth  
Marvin and Dixie Droegge  
John and Jeanie Ferguson  
Wayne Feuerborn  
Ron and Karen Finke  
Carol Floyd  
Chuck and Colleen Foudree  
Robert and Jefri Franks  
Noel and Carolyn Fulkerson  
William Gann  
David and Jeanne Geiman  
Bob Glaser Family Fund  
David and Henri Goettel  
Sara Lloyd Goyer & Geoffrey Caldwell Goyer  
Dr. Fred and Marge Hahn  
Doug and Beth Hammer  
Ed Hammond Family

Phil and Nancy Hanson  
Douglas G. and Helen Ann Hatridge  
Bill and Wilma Henks  
William Richard (Rick) and Linda Henks  
Bryan and Tina Hughes  
Dr. Edward and Connie John  
Gary E. Jones and Laura Lane Jones  
Jerry and Sharon Kasten  
Sharon K. Kelly  
Maureen Kennedy  
Rebecca Knepper  
George and Ronna Koepp  
Richard and Pamela Kreher  
Janet D. Lacey-Hodges  
Don and Ruth Landis  
George and Rita Langton  
Mary Long  
Donna Lou Lyle  
Tom and Myrna Mardis  
Gale Martin  
LaDonna Masters  
Nancy J. Mayhall  
David and Connie Mayta  
Gary and Liz McClure  
Harry and Donna McDaniel  
Carol McGraw  
Mike and Jan McGraw  
Zita McGraw  
Carlton and Leslie Milby  
Melanie Moentmann  
Nancy Murdock  
John and Judy Ness  
Wendell and Myrna Olson  
Russell and Mabel Pepper  
Randy and Judy Porter  
William and Melissa Powell  
Jeffrey and Marita Ray  
Jana Redding  
Missy Reimann  
Gary and Glenda Riekhof  
Katherine H. Rolfe  
Gerald and Andrea Rooker  
J. Brian Russell  
John and Karen Schuler  
Barbara Schuster  
Elizabeth A. Scott  
Clifford M. and Mary Beth Seger  
Marc and Bridgette Shaffer  
Dr. Steve Silverstein  
William C. and Anne M. Sizemore  
Terry and Betty Snapp  
Jim and Mary Stille  
Dan and Shannon Sundberg  
Jane Taylor  
Allan and Karen Thompson  
Paul and Marilyn Thomson  
Gary Toms  
Lance Trammell and Heather Dawkins  
Montie and Marjorie Tripp  
Fern Truschke-Stuart  
Scott and Jennifer Turner  
Todd and Nicole Underwood  
Charles and Elizabeth Unger

Michael and Mary Jo Watkins  
Lysle and Carolyn Weeks  
Brenda West  
Bob and Candy White  
Lee Williams and Brent Schondelmeyer  
Anne Marie Wix  
Russell and Alicia Wolford  
Debra S. Wood  
Susan Wopata  
Scott and Linda Wright  
David and Shirley Wurth  
Lennie Wyre

### MATURED GIFTS

Anonymous - 8  
Dorothy D. Bay  
Jerry and Doreen Benton  
James D. Browning  
Donna G. Bullock  
Gene and Joanne Cable  
Beverly A. Cathcard  
Earl Kenneth Cavanah  
Roberta Coker  
Phyllis Combest  
Norman, Mary Anne and Chris Davidson  
John and Rosalie Dubach  
Willia Fancher  
Helen French  
Kathleen Halcro  
Harold and Mary Ellen Hall  
Elaine Hartong  
Helen Hilliard  
Roy Holt and Emma Jean Tuck Holt  
Margaret E. Hurt  
V. Carl Jelley, MD  
Gene Lewis  
Forest and Marjorie Martin  
Richard R. and Ester G. McCall  
Homer McWilliams  
Marie Mickelson  
Lorene Mitchell  
Marcella Morgan  
Richard and Virginia Nadeau  
Marjorie Pollard  
Dick Puhr  
Brad and Sharon Reimal  
Richard Rhodes  
Norman Ring and Sara Crow-Ring  
Connie Rose  
Linda Jane Salts  
Harold H., Norma J. and James Allan (Jimmy)  
Schmidt  
Alvin and Ella Marie Sehart  
Martin D. Shrout  
Paul Stone, Jr.  
Clarence and Betty Stowell  
Bill Summa and Peggy Summa  
Martha Taggart  
Garland and Pauline Tripp  
Howard and Frances Vaughan  
Elizabeth C. Weekley-Sutton  
Thomas L. Winslow

# FOUNDATION FAN CLUB

## Connecting Donors to the Heart of Our Mission

Joining the Foundation Fan Club is a meaningful way to support the mission and operations of your community foundation. Fan Club members' generosity strengthens our initiatives and enhances the services we provide to fundholders, ensuring lasting community impact.

## FAN CLUB MEMBERS SUPPORT THE FOUNDATION THAT SUPPORTS THE COMMUNITY



### Educating Future Leaders

Our Youth Advisory Council empowers over 70 Eastern Jackson County high school students each year with hands-on experience in fundraising, grantmaking, and volunteering.



### Engaging Community Voices

Through four regional Advisory Boards, we connect with over 70 community leaders, strengthening local engagement and our philanthropic impact.



### Addressing Community Needs

As a catalyst for change, we foster collaboration and leverage resources to meet evolving community challenges. Our grants and scholarships provide essential support, helping students and organizations thrive.



**BECOME A  
FAN CLUB  
MEMBER**



## 2024 FOUNDATION FAN CLUB MEMBERS

THANK YOU FOR YOUR SUPPORT OF OUR MISSION!

### AMBASSADOR FANS (\$1,000+)

Steve and Marianne Noll  
Silverstein Funding Solutions, LLC

### RAVING FANS (\$500)

Martha Cockerell  
Bill and Jill Esry  
Randall and Helen Ferguson  
Nancy & Phil Hanson Family Foundation Fund  
Sharon Kelly  
Adam Kliethermes  
Bret Kolman  
Tom and Kathy Rohr Family Foundation Fund  
Jovanna Rohs  
Beth Rosemergy  
John and Karen Schuler Family Fund  
Terri Steele  
Jim and Mary Stilley  
The Irish Pub House

### SUPER FANS (\$250)

Jerry and Donna Carey  
Dr. Robert Cordell and Dr. Casey Cordell  
Michele Crumbaugh  
Cole and Tracy Eason  
The Foudree Family Donor-Advised Fund  
Beth Franklin  
Hammer Family Fund - Beth Hammer  
Hammer Family Fund - Doug Hammer  
Douglas G. and Helen Ann Hatridge Family Foundation Fund  
Tom Jackson  
Rebecca Knepper  
Matt Medley  
Melanie Moentmann Charitable Fund

Steven Potter  
John and Machel Ruddy  
Dennis and Elizabeth Savidge  
Terry and Betty Snapp  
John and Bridget Stoppelman  
Sue Frank Insurance Agency, Inc.  
Allan Thompson  
Jeff Walters  
Mike and Jody Watkins  
Jay and Lynette Wheeler  
Bob and Candy White Foundation

### AVID FANS (\$100)

David and Cathy Allie  
Rob Binney  
Ted Bowman  
Diana Castillo  
Scott and Trena Chase  
Cindy Foster  
Linda and Mike Gerding Family Fund  
Fred and Julie Grogan  
Grubb Law Firm, PC  
Keith Hannaman  
Mike and Joy Hobick  
Damon Hodges  
Mike and Jacci Kelly  
L.D. Koirtzohann Family Fund  
Lee's Summit R-7 School District  
Connie Mayta  
Megan Mercer  
Mark and Debbie O'Renick  
Rochelle Parker  
Jim and Debbie Pryde  
Lawrence and Rene Purtee  
Kim and Debbi Roam  
RW2 Career and Technical Education

Stan and Barbara Salva  
Derek Schoeneberg  
Bridgette Shaffer  
Mark and Patti Simcosky  
Kenneth and DeeAnn Stock  
David and Daneen Thurman  
David and Shirley Wurth

### FANS (\$50)

Toni Alexander  
Aaron Brown  
Ryan Crider  
John Dane  
Antwan Daniels  
Trey DeRousse  
Lori Halsey  
Anthony Hart and Stacie Short  
Loretha Hayden  
Liesl Hays  
Travis Hunt  
Madison Kunkel  
Lee's Summit Resident  
Kelley Manning  
Randy and Robin McClain  
Ritchie Momon  
Janice Phelan  
Melissa Reimann  
Merideth Rose  
Ian Scott  
Joanne Smith  
Michele Spilker  
Dave Turner  
Cory Unrein  
Michael Vestweber  
Joel Wilson



# CHARITABLE FUNDS

## Connecting Donors with Smart Giving

Donors choose Truman Heartland Community Foundation to ensure their contributions create local impact while aligning with their financial giving goals. In 2024, \$4.5 million was contributed by donor advised fundholders to support their favorite charities. We take pride in helping fundholders give wisely while championing the causes they care about most.

### DONOR ADVISED FUNDS

#### FLEXIBLE & IMPACTFUL GIVING

**A Donor Advised Fund (DAF) is like a personal charitable giving account, managed by your community foundation. Donors receive immediate tax benefits, contribute at their convenience, and recommend grants to qualified charities anytime. At Truman Heartland, DAF fundholders can also grow their funds into an endowment through their estate. A minimum contribution of \$5,000 is required to establish a DAF.**

#### NEW IN 2024

Sharon J. Burton Foundation Fund  
Aaron & Jenny Bush Ministry Fund  
Jamie L. Butler Foundation Fund  
Jeffrey P. Butler Foundation Fund  
Brad & Christina Cutcliffe Donor Advised Fund  
Daniel and Sarah Henks Family Foundation Fund  
Kennedy Foundation  
Steve and Leslie King Foundation  
Jimmy and Trina Mackey Charitable Fund  
Northwest Passage Charitable Fund  
Rose & John Simone Charitable Fund

### DONOR ADVISED FUNDHOLDERS

Clint and Ingrid Anderson Charitable Fund  
Aslakson Family Foundation  
Boyd and Tibby Ballard Charitable Fund  
Rick Cox and HazelAnn Barkie 'It is in giving that we receive'  
Bill and Darleen Barnes Charitable Fund  
Barnett and Crumbaugh Family Fund  
Kenneth and Sharon Basham Charitable Fund  
Carol Sue and Kenny Bass Charitable Fund  
HMF Beaudoin Family Foundation  
Beem Snapp Family Foundation  
Jerry and Doreen Benton Family Foundation  
C. Glenn & Ada M. Betts Family Fund  
Blessen Charitable Foundation  
Craig and Debbie Bolger Charitable Fund  
Mikie Bowman Charitable Fund  
Jared and Samantha Boyett Foundation Fund  
Ruth J. Brackney Family Fund  
Darren Brungardt Charitable Foundation Fund  
C. Robert Buckley Family Fund  
HB and Carol Burchett Giving Foundation  
Aaron and Jenny Bush Charitable Fund  
David L. Bush Foundation Fund  
Butler Family Foundation Fund  
Gene and Joanne Cable Donor-Advised Fund  
Jerry and Donna Carey Foundation  
Cargo For Kids  
Cavanah Family Fund  
Centerpoint Medical Staff Community Grants Fund  
Karen Chang Charitable Fund  
William R Chipman Family Charitable Fund  
Roberta Coker Charitable Fund  
Byron Constance Fund  
Larry and Wanda Cook Family Charitable Fund  
Mike and Morrisa Costanzo Charitable Fund  
Brad and Sandy Cox Family Foundation Fund  
Cras in Umbra  
Cunningham/Weeks Advisory Fund  
Catherine J. A. Curtis Family Fund

Gayle Frances Davidson Memorial Fund  
Davis Family Foundation Fund  
Rick Didier and Cynthia Randazzo Family Foundation Fund  
Richard Digby Memorial Fund  
Ditty Family Charitable Fund  
Donahue Family Foundation Fund  
Sam and Vera Doult Charitable Fund  
Duvall Family Foundation for Children  
Earth Effects Outdoor Living Donor-Advised Fund  
Elias Family Charitable Fund  
Ennis Family Fund  
Bill and Jill Esry Family Foundation Fund  
Sterling and Donna Farber Family Foundation  
Farrington Family Fund  
Ferguson Family Foundation  
John and Jeanie Ferguson Foundation  
Wayne Feuerborn Family Fund  
Finke Family Foundation Fund  
Wendy Fitzgerald-Blue Foundation Fund  
Forrester Family Fund  
Rick and Elizabeth Forth Family Foundation  
The Foudree Family Donor-Advised Fund  
Sue Frank and Ted Bowman Foundation Fund  
Kenneth L. and Eleanor R. Frasier Charitable Fund  
Jerome M. Frederick Charitable Fund  
Helen French Family Endowment  
Noel and Carolyn Fulkerson Foundation Fund  
David and Jeanne Geiman Fund  
Linda and Mike Gerding Family Fund  
Dr. Steve Gialde Memorial Fund  
Bob Glaser Donor Advised Fund  
Greco Family Foundation Fund  
Randy and Carla Griffin Family Foundation Fund  
Jeff and Lori Grubb Charitable Fund  
Fred and Marge Hahn Family Fund  
Hamilton Charitable Fund  
Hammer Family Fund  
Hampton Family Fund  
Charles W. and Bette J. Hampton Family Foundation

Hand-in-Hand Fund	Scott and Jackie Lueckert Family Foundation Fund	Judith A Scammon Charity Fund
John G. Hansen Charitable Fund	Magady Family Education Fund	Kathy Schadle Foundation Fund
Nancy and Phil Hanson Family Foundation Fund	Make a Difference Fund	Schondelmeyer-Williams Fund
The Robert E. and Debra A. Harmon Fund	Maple Family Foundation	Jon and Karen Schroeder Family Foundation
Charles W. and Phyllis A. Harrel Charitable Foundation	Michael Martin Family Fund	John and Karen Schuler Family Fund
Douglas G. and Helen Ann Hatridge Family Foundation Fund	David and Connie Mayta Charitable Fund	Schwartz Family Fund
Todd and Lora Jane Haynes Family Foundation	McCandless Family Fund	Kenneth and Susan Scott Family Foundation
Head-French Family Fund	McCandless/Taylor Fund	John and Bette Sellars Family Foundation
Gloria L. Helmer Charitable Fund	McClure Family Fund	Sharing for Shannon Memorial
Henks Financial Group Charitable Fund	Mike and Jan McGraw Family Foundation Fund	Lou and Al Sharp Charitable Fund
Dennis and Machele Henks Family Fund	Bruce and Tracey Mershon Family Foundation Fund	Dan Sheehan Foundation Fund
Rick and Linda Henks Donor Advised Fund	Tim and Elaine Metcalf Family Foundation Fund	Charles and Brenda Shields Family Foundation
Henman/Dicken Family Trust	Michael and Linda Meyers Family Foundation	Valerie J. Shulfer Charitable Fund
Robert and Mary Hepting Foundation	Millay Family Foundation	Julie Shull Charitable Foundation
Higgins Family Fund	Mitzvah Fund	Dennis D. and Deborah K. Smith Family Foundation Fund
Alan and Connie Hill Charitable Fund	Melanie Moentmann Charitable Fund	Speaks Foundation
Mike and Joy Hobick Foundation	Dr. Kim Mongeau Charitable Fund	Stephenson Family Charitable Fund
Dan and Deedy Hodes Family Foundation Fund	Kirk and Cindy Morehead Charitable Fund	Jim and Mary Stilley Donor Advised Fund
Dennis and Shirley Hogenkamp Charitable Fund	Peter and Karen Muelleman Family Foundation Fund	Norman and Darleen Swails Fund
Carl and Terri Hopkins Family Foundation	John and Judith Ness Fund	Darren Taylor Foundation Fund
Doug and Sara Horn Foundation Fund	Neville Donor Advised Fund	Mitchell and Betsy Taylor Family Fund
Ken and Melanie Horrell Charitable Fund	New Life Trust Fund	Taylor/Johnson Fund
Harvey and Lois House Family Foundation Fund	Evan Noll Memorial Fund	Cathy Tharp Family Fund
Tina and Bryan Hughes Fund	Brian and Cynthia Petrie Donor Advised Fund	Thompson Family Charitable Foundation
Independence Fund	Larry and Shirley Phipps Charitable Fund	Paul and Marilyn Thomson Family Fund
Independence Young Matrons Endowment Fund	Pogson Family Foundation Fund	John S. Thornton Family Fund
The Insight Charitable Fund	Robert and Beverly Powell Family Foundation	Garland and Pauline Tripp Foundation
Jerabek Family Foundation	Prevost Family Foundation	Montie and Marjorie Tripp Family Foundation Fund
David and Lydia Jeter Family Fund	Pryde Family Foundation Fund	TruckMovers Charitable Foundation
Joseph and Heather Johnson Foundation Fund	Pumphrey Legacy Foundation	Todd and Nicole Underwood Family Ministry Fund
Johnston Charitable Fund	Ragan Foundation Fund	Charles and Elizabeth Unger Family Foundation
Gary E. and Laura Lane Jones Charitable Fund	Mary Ann and Randall Rhoads Charitable Fund	Unilever Charitable Fund
Fred and Joyce Keenan Foundation Fund	Mike and Nancy Roark Family Foundation	Greg Vance Charitable Fund
Michael T. and Jacci Kelly Family Foundation	Roger and Carol Roberts Family Foundation Fund	Vaughan Family Foundation Fund
Maureen A. Kennedy Giving Fund	Tom and Kathy Rohr Family Foundation Fund	Viracor Eurofins Volunteer Committee Fund
Travis and Heather Kenney Foundation Fund	Rooker Family Giving Fund	Robert and Carolyn Weir Gifting Fund
Russ and Susan Kerley Foundation Fund	Michael Adam Rosenblum Foundation	Brenda Rapp West Foundation
Kimak Family Fund	Francis and Lori Ross Family Foundation	White Family Memorial Fund
Brent and Julie Kirkpatrick Charitable Fund	Rotary Club of E. Indep, MO Community Grants Fund	Bob and Candy White Foundation
Koepp Family Fund	Rotary Club of Independence Community Grants Fund	Widick and Appleberry Family Fund
L.D. Koirtz Family Fund	Rotary Club of Independence - William D. Palmer Endowment Fund	John and Sharon Williams Family Fund
Anthony and Gwen Kraus Charitable Family Foundation	Ed and Sue Russell Family Foundation Fund	Debra Sue Wood Charitable Foundation Fund
Richard and Pamela Kreher Family Fund	J. Brian Russell Donor Advised Fund	Wray Family Charitable Fund
Janet D. Lacey-Hodges Charitable Fund	Dorothy Salyer Charitable Fund	Jason Wright Fund
Randolph and Karen Lantz Family Foundation	Richard Edward Sanderson Foundation	Dave and Shirley Wurth Family Foundation
Lefko Family Foundation Fund		Lenora "Lennie" Wyre Charitable Fund
Robert Lilly Foundation		Justin and Dyan Zimmerman Charitable Fund
Lochmann Family Charitable Fund		
Lucky Penny Charitable Fund		

# CHARITABLE FUNDS

## DESIGNATED FUNDS

**A Designated Fund is a customized fund that enables you to easily support the specific causes and organizations that matter to you the most. You can use cash, stock, or other assets to establish a named fund and become eligible for an immediate income tax deduction.**

### SINGLE FUNDS

All Creatures Fund

Alpha Iota Educational Foundation Fund

Association of Fundraising Professionals  
Mid-America Chapter Operating Fund

Dorothy D. Bay Charitable Fund

Blue Springs City Theatre Foundation Fund

BS Historical Society - Alwinda Wallace  
Endowment Fund

Donna G. Bullock Family Fund

Burford Cemetery Fund

Butler R-5 Educational Foundation

Tom Cairns Endowment Fund

Cancer Action Fund

Beverly A. Cathcard Designated Endowment

Earl Kenneth Cavanah Donor Advised  
Endowment Fund

Center Place Educational Foundation  
General Fund

Child Abuse Prevention Association General  
Endowment Fund

John E. Cianciolo Memorial Golf  
Tournament Fund

Citizens for the Archives Fund

Mel Colley LEAD Scholarship Fund

Community Services League Endowment Fund

Developing Potential Endowment Fund

Orena D. Dorsch Religious Ministries  
Endowment Fund

Drumm Ctr for Children, Inc Educational  
Enrichment Endowed Fund

John and Rosalie Dubach Charitable Fund

Eastern Jackson County Youth Court Fund

Alece Ellis Cemetery Fund

Alece Ellis Endowment Fund

Englewood Arts Fund

Project Click Englewood Arts Fund



Family Conservancy Fund

Friends of Englewood Theater Fund

Friends of the Blue Springs Ballet Dance  
Scholarship Fund

Funding the Well-Being of Families Fund

Gateway Church Capital Campaign Fund

Grain Valley Assistance Council - Master Fund

Grandview Parks and Recreation Foundation

Hatridge Career Support Scholarship Fund

Heart of America Council, BSA/Blue Elk  
Endowment Fund

Heritage Philharmonic Endowment Fund

Betty and Bud Hertzog Fund for the Lee's  
Summit Historical Society

Historical Society of Lee's Summit

Myrtle Hoffman & CS Monnier Memorial Fund

Roy David Holt and Emma Jean Tuck Holt  
Charitable Fund

Hurt Family Endowment Fund

Independence Police Foundation Fund

I Love Independence Video Contest Fund

Independence Youth Court Fund

Jackson County Columbian Home Association

Job One Endowed Fund

Kansas City Chorale Fund

KC Metro Mens Chorus

Kansas Herpetological Society Fund

K & M Karcher-Lumsden Charitable Fund

Frank Kobe Business Academy Endowment  
Fund

Lafayette County C-1 Educational Foundation  
General Fund

Lake Doniphan Campground Endowment Fund

Lee's Summit CARES Endowment Fund

Lee's Summit Optimist Foundation Fund

Lee's Summit Symphony Endowment Fund

Lee's Summit Underwater Rescue  
& Recovery Fund

Anna Marie Mahoney Foundation Fund

Marian Hope Endowment Fund

Richard and Esther McCall Endowment for the  
First Baptist Church, Independence, MO

Richard and Esther McCall Endowment  
for Higher Education

Zita McGraw Charitable Endowment Fund

Meals on Wheels of Lee's Summit - Operating  
Reserve Fund

Metropolitan Community Colleges' Indep.  
Development Fund

Frank and Marie Mickelson Endowment Fund

MALA Long-term Investment Fund



Midwest Hemophilia Association Fund  
 MBCH Children and Family Ministries Endowment Fund  
 Mitchell Foundation  
 National Steamboat Museum Fund  
 Northland Symphony Orchestra Association Endowment Fund  
 Oak Grove School District Education Foundation  
 Oakland Cemetery Fund  
 Park University Endowment Fund  
 PeacePathways Operations Reserve Fund  
 Platte County Senior Fund  
 Plaza Heights Building a Legacy Fund  
 Power House Theatre Foundation Fund  
 Ralph E. Pratt Memorial Fund for the Preservation of the Historic Stone Church  
 Raymore-Peculiar Public School Foundation Fund  
 Raytown Tree Fund  
 Raytown Historical Society Fdtn General Endowment Fund  
 Brad and Sharon Reimal Legacy Fund  
 Norman Ring and Sara Crow-Ring Charitable Foundation  
 St. George Catholic Church Fund  
 Edna M. Scahill Endowment Fund  
 Harold H., Norma J. & James Allan (Jimmy) Schmidt Charitable Fund  
 School of Economics Money Market Fund - Blue Springs  
 Alvin and Ella Marie Sehrt Fund  
 Martin D. Shrout Endowment  
 The Spirit of Independence Community Band Fund  
 Willis and Linda Sue Staller Endowment for Timothy Lutheran School  
 Sugar Creek - Friends of the Parks Fund  
 Sustainable Hope International  
 William M. and Martha L. Thomas Fund  
 Jeffrey Tognascioli Memorial Fund  
 Harry S. Truman Library Institute Fund  
 Truman Medical Center-Lakewood NICU Fund  
 Welcome Wellness Health Education Resource Center Operations Reserve Fund  
 Thomas L. Winslow Endowment  
 Won By One to Jamaica Operations Reserve Fund  
 Youth Art Show Fund

## MULTIPLE FUNDS

### Blue Springs Christian Church

Blue Springs Christian Church Fund  
 Blue Springs Christian Church Multiply Fund

### Cass County Historical Society

Cass County Genealogical Society Endowment Fund  
 Cass County Historical Society Non-Endowed Fund  
 Irene Pippit Trust Fund

### Center for Conflict Resolution

Center for Conflict Resolution Center Fund  
 Center for Conflict Resolution Short Term Investment Fund (Operating Reserve)

### Center for North American Herpetology

Center for North American Herpetology (CNAH)  
 CNAH - The Suzanne L. and Joseph T. Collins Fund  
 CNAH - Operating Reserve Fund  
 CNAH - Slowinski Fund  
 CNAH - George Toland Award for Ecological Research on North American Herpetofauna Fund

### City of Blue Springs

City of Blue Springs Vesper Hall General Fund  
 City of Blue Springs Vesper Hall Nutrition & Homebound Fund

### City of Independence

Animal Shelter Fund  
 George H. Collings Memorial Endowment for Palmer Center  
 Fire Safety Equipment Fund  
 Friends of Parks & Recreation - George Owens Nature Park  
 Friends of Parks & Recreation - Palmer Center Senior Services Enhancement Fund  
 Friends of Parks & Recreation - Palmer Senior Center Endowment  
 Friends of Truman Depot Endowment  
 McCoy Park All Inclusive Play Project Fund  
 Pioneer Woman Statue Endowment  
 Sermon Memorial Room Endowment  
 Sermon/Old Spring Project Endowment  
 Sister City Fund  
 Truman Memorial Building Restoration Fund  
 Truman Memorial Walking Trail Fund  
 Waggoner Memorial Endowment Fund





# CHARITABLE FUNDS

## **City of Lee's Summit Community Foundation**

Animal Welfare  
Cultural Arts  
Environment and Beautification  
K-9 Unit  
Mayor's Fund  
Police Youth Programs  
Public Safety

## **Clinton Methodist Church**

Operations Reserve Fund  
Memorial Fund  
Outreach Fund  
Scholarship Fund  
Trustee's Fund

## **Community of the Good Shepherd**

Community of the Good Shepherd Fund  
Adolf Heine Memorial Fund  
Community of the Good Shepherd Operating Reserve Fund

## **Comprehensive Mental Health**

Client Services Fund  
Services Foundation, Inc. Fund

## **First Baptist Church of Independence**

Endowment Fund  
Myrtle Mingle Music Fund  
Non-Endowed Fund

## **First Christian Church Independence**

Capital Improvements Fund

## **Gift of Life**

Keith Anderson Memorial Fund  
Endowed Fund  
Non-Endowed Fund

## **Grain Valley School District Foundation**

A Plus Fund - Grain Valley School District Foundation  
Athletics Fund - Grain Valley School District Foundation  
Bright Futures - Grain Valley School District  
Classroom Grants Fund - Grain Valley School District Foundation  
Classroom Technology Fund - Grain Valley School District Foundation  
General Fund - Grain Valley School District Foundation  
Grow Your Own Teachers Fund - Grain Valley School District Foundation  
Instrumental Music Fund - Grain Valley School District Foundation  
Library Resources Fund - Grain Valley School District Foundation  
Outdoor Classroom Fund - Grain Valley School District Foundation  
Robotics Program Fund - Grain Valley School District Foundation

## **Harrisonville Parks and Recreation Foundation**

Harrisonville Dog Park  
Harrisonville Parks and Recreation Foundation  
Harrisonville Kiwanis Playground Fund  
Harrisonville Rotary Playground Fund

## **Heart of America Chorus of the KC Chapter of SPEBSQSA, Inc.**

Heart of America Chorus Endowment Fund  
Heart of America Chorus of the KC Chapter of SPEBSQSA, Inc. Fund

## **Hillcrest Ministries**

Hillcrest Ministries Endowment Fund  
Hillcrest Ministries Fund

## **Hope House, Inc**

Anonymous Endowment Fund  
Endowment Fund  
M. E. Hurt Endowment Fund  
Shaunda L. Thomas Foundation

## **Jackson County Historical Society**

Jackson County Historical Society Archives Fund  
Jackson County Historical Society Endowment Fund  
Jackson County Historical Society Frank Jennings Fund  
Jackson County Historical Society Operating Non-Endowment  
Jackson County Historical Society Bess Hatten Raymond Fund  
Roger T. Sermon - Jackson County Historical Society Fund

## **Junior Service League**

Administrative Savings Fund  
Community Trust Savings Fund  
Norman and Mary Anne Davidson Endowment  
Frances Hink Endowment Fund  
Marjorie N. Martin Endowment Fund  
Memorial Fund

## **Kansas City Hospice**

Kansas City Hospice Fund  
Kansas City Hospice - Endowment Sub-Fund

## **Legacy for LS Parks Foundation**

Legacy for LS Parks Foundation Fund  
Legacy for LS Parks Foundation Gamber Center Fund  
Legacy for LS Parks Foundation Scholarship

## **Meals on Wheels Independence**

Meals on Wheels - Endowment Fund  
Meals on Wheels Operating Reserve Fund

## **Messiah Lutheran Church**

Messiah Lutheran Church Endowment Fund  
Messiah Lutheran Church Trust Fund



**Mid-Continent Public Library**

Mid-Continent Public Library General Fund  
 MCPL James A. Leathers Scholarship -Library Supplement Fund  
 Mid-Continent Public Library Midwest Genealogy Center Capital Fund  
 Mid-Continent Public Library Story Center Fund  
 Mid-Continent Public Library Summer Reading Endowment Fund  
 MCPL Woodneath Story Center Endowment

**Missouri Park & Recreation**

MO Park & Recreation Beaver Estate Fund  
 MPRA Lyle B. Beaver Leadership Development Institute Endowment Fund  
 MO Park & Recreation Building Maintenance Fund  
 MPRA Education Fund  
 MO Park & Recreation Operating Reserve Fund

**Mother's Refuge**

Mother's Refuge Endowment Fund  
 Mother's Refuge Operating Reserve Fund

**Music/Arts Institute**

Music/Arts Institute Endowment Fund  
 Molly Clemons Memorial Scholarship

**Puppetry Arts**

Puppetry Arts Capacity Building Fund  
 Puppetry Arts Institute Endowment Fund  
 Puppetry Arts Institute Museum Fund

**Raytown Community Foundation**

350 Highway Corridor Plan  
 Raytown Community Foundation Fund

**Raytown Educational Foundation**

Raytown Educational Foundation Short Term Repository Fund  
 Raytown Educational Foundation Fund  
 Soule Family Endowment Fund

**Raytown Emergency Assistance Program**

Raytown Emergency Assistance Program (REAP) Fund  
 Raytown Emergency Assistance Program Endowed (REAP) Fund

**Society for the Study of Amphibians and Reptiles**

SSAR - Bailey Endowment Fund  
 SSAR - Roger Conant Grants (GIH) Reserve Endow Fund  
 SSAR - Contribution Reserve  
 SSAR - Harold A. Dundee Endowment  
 SSAR - Carl Gans Traveling Fellowship Endowment  
 SSAR - General Operating Reserve Fund  
 SSAR - Gordon Endowment Fund  
 SSAR - Hutchison Endowment Fund  
 SSAR - Margarita Metallinou Endowment  
 SSAR - Dean Metter Memorial Award Endow Fund  
 SSAR - Minton Endowment  
 SSAR - Seibert - Liner Award Endowment Fund  
 SSAR - Special Publication Reserve Fund  
 SSAR - Wahlgren Endowment  
 SSAR - Weinkle Pre-College Award Endowment

**Summit Christian Academy**

Summit Christian Academy  
 Summit Christian - Tuition Assistance Endowment Fund

**Timothy Lutheran Church**

Timothy Lutheran Church Fund  
 Timothy Lutheran Designated Fund  
 Timothy Lutheran - Facilities Designated Fund  
 Timothy Lutheran - Growth & Expansion Fund  
 Timothy Lutheran - Carol Logan - Memorial Endowment Fund  
 Timothy Lutheran - Prather Operations Reserve Fund

**Truman Heritage Habitat for Humanity**

Truman Heritage Habitat for Humanity Endowment  
 Friends of Truman Heritage Habitat for Humanity  
 Truman Heritage Habitat for Humanity - Operating Reserve  
 Truman Heritage Habitat for Humanity - Hiram Young School

**Victorian Society of the Vaile Mansion**

Norman & Mary Anne Davidson Endowment  
 Vaile Victorian Society Endowment Fund  
 Vaile - Reserve Fund

## FIELD OF INTEREST FUNDS

**Field of Interest Funds allow you to focus your charitable giving toward a general area of interest, while our expertise in the local nonprofit sector allows us to recommend the organizations that are the best fit for the intention of your funds.**

Blue Springs Parents Club  
Bryant School and Neighborhood Playground Fund  
Charitable Reinvestment Foundation Fund  
Noel & Carolyn Fulkerson Charity Benefit Fund  
GEHA Charity Golf Tournament Fund  
Grandma's Alzheimer Fund  
Darrell Hein Memorial Eagle Scout Project  
Ian's Story Fund for Testicular Cancer Awareness  
Rotary Club of Independence Carnival (MARDI GRAS) Fund  
Melvin Jones Eye Fund  
KCMPRDA Fund  
Lee's Summit Kiwanis Club Fund  
Legacy Foundation Fund

Lions Eye Fund  
Gary and Jan Martinette Scholarship Fund  
Neighborhood Dinner Fund  
Open Arms Foundation Fund  
PAWS Neuter/Spay Endowment Fund  
Dick Puhr Fund For Athletes  
Racial Equity Action Fund  
Revolving Rehabilitation Loan Fund  
Harry S. Truman Memorial Scholarship Fund  
United Nations Peace Memorial Fund  
Veterans Way Memorial Fund  
Eileen Normile Weir Community Impact Endowment Fund  
Youth Advisory Council Fund

## DEFERRED ENDOWMENT FUNDS

**A deferred endowment fund is a planned gift made during a donor's lifetime, but the recipient doesn't receive the benefits until a later date, when it matures. The principal of a deferred endowment fund is usually held in perpetuity to create a legacy.**

Amelia Fund  
Leslie Beth Anderson Charitable Fund  
L. Joseph Arth Donor Advised Fund  
Bailey Charitable Foundation  
Mark and Dianne Ballantyne Charitable Foundation  
Carol J. Carpenter Charitable Fund  
Richard L. Cates Foundation Fund  
Mary Lou Chalmers Charitable Foundation  
James W. and Stephanie D. Chipman Charitable fund  
Clay County Senior Services Fund  
J.D. and Jeanne Cooper Foundation  
John and Melanie Courtney Charitable Foundation  
Iris Dean Meda Memorial Nursing Scholarship Fund  
Marvin and Dixie Droege Charitable Fund  
R.C. and Judy Ebert Family Foundation Fund  
Carol Floyd Foundation  
Robert R. Franke Donor Advised Fund  
Robert and Jefri Franks Charitable Foundation Fund  
Robert and Jefri Franks Scholarship Fund  
Sara Lloyd and Geoffrey Caldwell Goyer Foundation Fund  
Hamilton Scholarship Fund  
Ed and Sharon Hammond Family Charitable Fund  
Rosalie M. Headley Scholarship  
William and Wilma Henks Family Foundation Fund  
Robert A. Hoke Charitable Fund  
Ruby Nell Hoke Charitable Fund  
Alice C Jackson Charitable Fund  
Dr. Edward and Connie John Donor Advised Fund  
Jerry and Sharon Kasten Family Foundation Fund  
Rebecca Knepper Charitable Foundation  
Donald E. Landis Charitable Fund

George and Rita Langton Foundation  
Elizabeth Marie Lewis Foundation  
Donna Lou Lyle Foundation  
Leland "Tom" and Myrna Mardis Foundation  
Donna Masters Charitable Fund  
Carlton and Leslie Milby Foundation  
Olson Student Assistance Scholarship Committee fund  
Russell and Mabel Pepper Family Foundation Fund  
Potts-Martin Fund  
Powell's Pals Love for Paws Fund  
Jeff and Marita Ray Foundation  
Don and Pat Redding Scholarship Fund  
Redding Family Charitable Fund  
Jana R. Redding Scholarship Fund  
Missy Reimann Foundation  
Richard Rhodes Fund for the Lexington Community  
Gary and Glenda Riekhof Family Foundation  
Barbara A. Schuster Fund  
Marc and Bridgette Shaffer Family Foundation Fund  
O. Wayne Smith and William T. Stewart Foundation Fund  
Dan and Shannon Sundberg Family Foundation  
Dennis and Jane Taylor Fund  
Allan L. and Karen S. Thompson Charitable Foundation  
Gary R. Toms History & Genealogy Education Fund  
Gary R. Toms History Scholarship Fund  
Lance Trammell Family Fund  
Gary and Nita Tripp Foundation  
Scott and Jennifer Turner Foundation Fund  
Watkins Family Foundation  
Anna Marie Wix Charitable Fund  
Wright Family Donor Advised Fund



# GENE AND JOANNE CABLE



Philanthropy is more than generosity—it's about vision, strategy, and leaving a meaningful legacy. Few exemplify this better than Gene and Joanne Cable, whose impact can be seen across education, healthcare, the arts, and community development.

Their story isn't just one of giving, but of thoughtful, strategic philanthropy that has created lasting change in Kansas City and beyond. We are honored to share the story of their legacy.

SCAN  
TO READ  
MORE



**Between 1998 and when they passed in 2022 and 2024, the Cables worked with THCF to contribute over \$1.1M to the following charities:**

American Cancer Society  
Barren County Family YMCA Inc  
Bingham Waggoner Historical Society  
Children's Mercy Hospital Foundation  
Children's Mercy Hospitals & Clinics  
Community Services League  
Drumm Farm Center for Children, Inc.  
Drumm Farm Foundation  
Elizabeth Hill McClure Scholarship Fund  
Eye Foundation of Kansas City  
First Presbyterian Church of Independence  
General Operating Fund  
Harry S. Truman Library Institute  
HCC Network  
Heart of America Boy Scouts of America  
Heritage Philharmonic  
Hope House, Inc.  
Indep. Community Christmas Concert Fund  
Independence Meals on Wheels  
Independence Police Dept. Charitable Foundation, Inc.  
Indep. Rotary Community Grants Fund  
Indep. School Dist. Foundation  
Indep. School District-Bingham Academy  
Institute for International Medicine  
Interactive African Missions Fund  
Jackson County Free Health Clinic Development Fund  
Jackson County Free Health Clinic Fund  
Jackson County Historical Society  
John Knox Village Foundation  
JSL Bess Wallace Truman Scholarship  
Junior Golf Foundation dba/First Tee of Greater Kansas City  
Junior Service League of Independence  
Junior Service League - Truman-Wallace Project Fund

Kansas City Symphony  
Kauffman Center for the Performing Arts  
KC Chorale Fund  
KCPT - Public Television  
Lee's Summit Symphony  
Mid America Multiple Sclerosis Achievement Center  
MS Achievement Center at KUMed  
Museum of Northern Arizona  
Music Arts Institute  
Nelson Gallery Foundation  
North Central Missouri College  
Powell Gardens  
Puppetry Arts Institute  
Rancho Feliz Charitable Foundation  
Salvation Army - Independence  
Salvation Army of Kansas and Western MO  
Stephens College  
St. Luke's Hospital Foundation, Inc.  
Sunshine Early Education Center  
Swinney Capital Campaign Fund  
THCF Job Skills for New Careers  
The Rotary Foundation  
Truman Heartland Community Foundation  
Turning Point The Center for Hope and Healing Fund  
University of Missouri Alumni Association  
University of Missouri - Columbia Foundation  
University of Missouri Kansas City Foundation  
Victorian Society of the Vaile Mansion  
Visiting Nurse Association Corporation aka VNA Home Health & Hospice  
Wheelchair Foundation Florida  
Woods Chapel United Methodist Church  
Worth County Progress Organization  
Youth Advisory Council Fund  
YouthFriends Special Events Fund

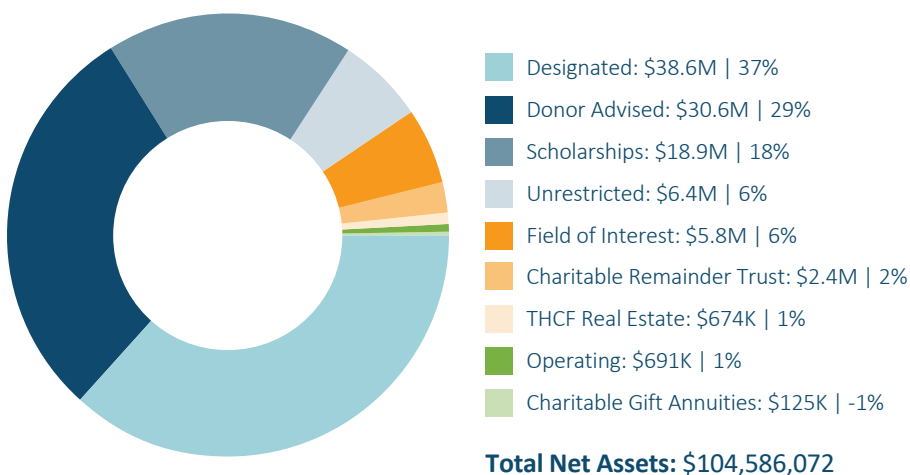


# 2024 FINANCIAL SUMMARY

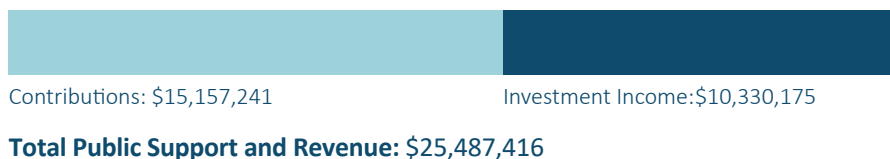
## Connecting Donor Investments to Responsible Stewardship

Since our founding in 1982, our net assets have grown to \$104 million, strengthening our ability to give back. In 2024, we awarded a record-breaking \$9 million in grants and scholarships, thanks to the trust and generosity of our fundholders. Together, we create lasting impact in Eastern Jackson County and beyond.

### TOTAL NET ASSETS



### 2024 TOTAL PUBLIC SUPPORT AND REVENUE



### 2024 TOTAL GRANTS AND EXPENSES



**Total Grants and Expenses: \$12,324,418**

*\*Funds Transferred Out refers to an organization fund that was transferred to consolidate other investments of the organization.*

### 2024 STEWARDSHIP BY THE NUMBERS

While your principle balance creates earnings, the growth is used to make an enormous impact on our community.



**2,420**  
GRANTS PROCESSED

**99**



TOTAL CASH/  
INVESTMENT ACCOUNTS  
RECONCILED MONTHLY

**2,151**

DONATIONS RECORDED



**28**

BOARD AND  
ADVISORY BOARD  
MEETINGS

**70+**

COMMITTEE  
MEETINGS

**14**

SPECIAL  
EVENTS



**96**

FINANCIAL  
ADVISOR  
PARTNERSHIPS

## CONSOLIDATED STATEMENT OF FINANCIAL POSITION

	2023	2024
<b>ASSETS</b>		
Cash and Investments	\$88,177,378	\$101,226,021
Other Assets	\$699,515	\$696,279
Insurance Policies	\$2,607,950	\$2,774,880
Property and Equipment, Net	\$8,486	\$3,930
<b>Total Assets</b>	<b>\$91,493,329</b>	<b>\$104,701,110</b>
<b>LIABILITIES</b>		
Accounts Payable	\$35,370	\$72,693
Payroll Liability	\$34,885	\$42,345
<b>Total Liabilities</b>	<b>\$70,255</b>	<b>\$115,038</b>
<b>TOTAL NET ASSETS</b>	<b>\$91,423,074</b>	<b>\$104,586,072</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$91,493,329</b>	<b>\$104,701,110</b>

## CONSOLIDATED STATEMENT OF ACTIVITIES

	2023	2024
<b>PUBLIC SUPPORT &amp; REVENUE</b>		
Contributions	\$11,647,699	\$15,157,241
Investment Income	\$11,387,428	\$10,330,175
<b>Total Public Support &amp; Revenue</b>	<b>\$23,035,128</b>	<b>\$25,487,416</b>
<b>GRANTS &amp; EXPENSES</b>		
Grants and Scholarships	\$7,327,560	\$8,977,210
Funds Transferred Out*	-	\$1,924,352
Operating Expenses	\$1,408,028	\$1,422,856
<b>Total Grants &amp; Expenses</b>	<b>\$8,735,587</b>	<b>\$12,324,418</b>
<b>CHANGE IN NET ASSETS</b>	<b>\$14,299,540</b>	<b>\$13,162,998</b>
<b>NET ASSETS AS OF JAN. 1</b>	<b>\$77,123,534</b>	<b>\$91,423,072</b>
<b>NET ASSETS AS OF DEC 31.</b>	<b>\$91,423,075</b>	<b>\$104,586,072</b>

\*Funds Transferred Out refers to an organization fund that was transferred to consolidate with other investments of the organization.

## UNDERSTANDING FUND TYPES

### DESIGNATED FUND

A fund established by a donor or charitable organization for the benefit of one of more charitable organizations.

### DONOR ADVISED FUND

A fund established at the request of a donor for charitable giving by the donor or persons designated by a donor.

### SCHOLARSHIP FUND

Established to provide educational scholarships to individuals.

### UNRESTRICTED FUND

Funds reserved for the discretion of the board of the foundation.

### FIELD OF INTEREST

Funds given by a donor for a specific charitable interest.

### CHARITABLE REMAINDER TRUST

Money in trust pays beneficiary and remainder goes to charity.

### REAL ESTATE

Land donated and held for sale.

### OPERATING

Funds from fundraising and operations of the foundation.

### CHARITABLE GIFT ANNUITY

Income for the lifetime of the beneficiary; remainder to charity.



## TRUMAN HEARTLAND COMMUNITY FOUNDATION

4200 Little Blue Parkway, Suite 340  
Independence, MO 64057  
(816) 836-8189 | [THCF.org](https://thcf.org)



# YOUR COMMUNITY FOUNDATION

**Connecting Private Giving for the Public Good**

### DONOR SERVICES

We manage more than 875 funds, providing fundholders with the tools and resources they need to engage in strategic giving. We offer services to maximize their tax benefits, plan a legacy, and ensure that their strategic planning is maximized. In 2024 we collected over \$15 million in new contributions, and our fundholder accounts earned income of over \$10 million.

### GRANT AND SCHOLARSHIP PROGRAMS

We manage student scholarships and nonprofit grant programs that distribute awards throughout the community. Due to the income earnings of our generous fundholders, we were able to distribute over \$9 million in 2024 to the Eastern Jackson County community and beyond.

### STRATEGIC INITIATIVES

We are committed to assessing the changing needs of our community and leveraging resources to promote collaboration with partners across the region. Our current Initiative is focused on Affordable Housing and aims to reduce barriers to housing in the Eastern Jackson County Region.

### YOUTH ADVISORY COUNCIL

Since 1998 we have fostered leadership in youth and worked to develop philanthropic habits in students. We serve over 70 students across 11 schools and expose them to fundraising and leadership opportunities. We also include them in the grant evaluation process as they determine who will receive funds from their endowment.