



COMMUNITY  
FOUNDATION  
OF TAMPA BAY



# THE IMPACT OF YOUR INVESTMENT

This report has been specially designed as a **SAMPLE**



Dear Mr. and Mrs. Sample,

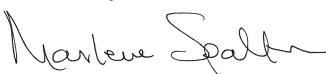
Your personal investments through the Community Foundation of Tampa Bay over the years have made a significant impact in assisting a remarkable number of people and organizations.

I want to thank you for giving us the privilege of helping you shape your charitable giving. Through your passions, kindness and desire to positively affect causes that are important to you, together we can address the needs of our most vulnerable neighbors with innovative solutions, helping to ensure that our community thrives.

Your attention to giving back allows us to influence the lives of generations to come. This past fiscal year, a record \$20.3 million in grants was awarded by the Community Foundation thanks to donors like you. Our foundation was built one donor at a time, one fund at a time. Your gifts demonstrate how every one of us can make a difference in the world by impacting one person, one cause, one community.

Your generosity over the last 3 years has empowered the Community Foundation of Tampa Bay to make a difference in our community, region and beyond. We extend our deepest gratitude for your investment in our shared future.

Sincerely,



Marlene Spalten  
President & CEO



**MARLENE SPALTEN**  
President & CEO  
mspalten@cftampabay.org  
813.609.4853

# HIGHLIGHTS & FUND ACTIVITY



## BALANCE

### DONOR ADVISED FUND

Non-Endowed Advised

### ESTABLISHED

12/16/2019

### BALANCE

\$347,981.45

### INVESTMENT

PORTFOLIO Edward Jones

## ADVISORS

### ADVISORS

Joe Sample -  
Fundholder

Mary Sample -  
Fundholder

Sally Doe -  
Edward Jones

## SUCCESSION

### TIER 1

Ms. Sally Sample-  
Daughter

### TIER 2

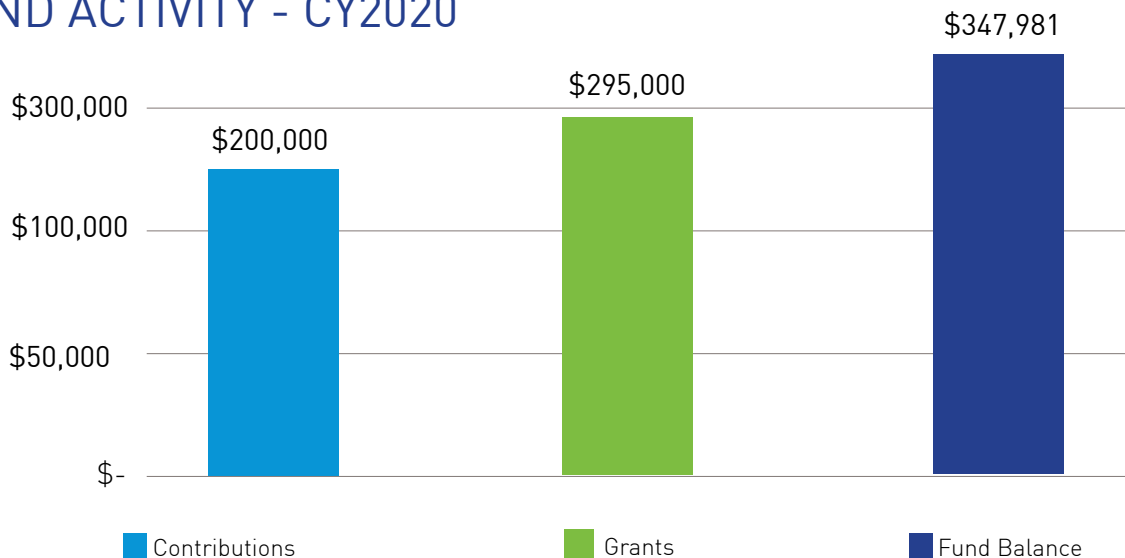
None  
specified

## HIGHLIGHTS

Grant making from your fund had its largest impact to date.

\$295,000 (12 Grants) Distributed in 2020

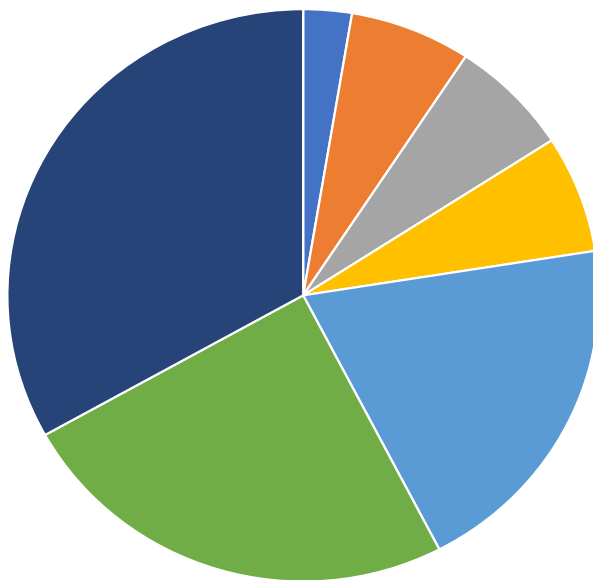
## FUND ACTIVITY - CY2020



# YOUR IMPACT



## CALENDAR YEAR GRANT MAKING BY CATEGORY



- Education: 2.65%
- Arts/Culture: 6.62%
- Disaster Relief: 6.62%
- Housing/Shelter: 6.62%
- Community Betterment: 19.87%
- Human Services: 24.50%
- Health/Mental Health: 33.11%

Please feel free to contact me at any time. I can be reached by email and phone at [nsilva@cftampabay.org](mailto:nsilva@cftampabay.org) or 813-609-4855.



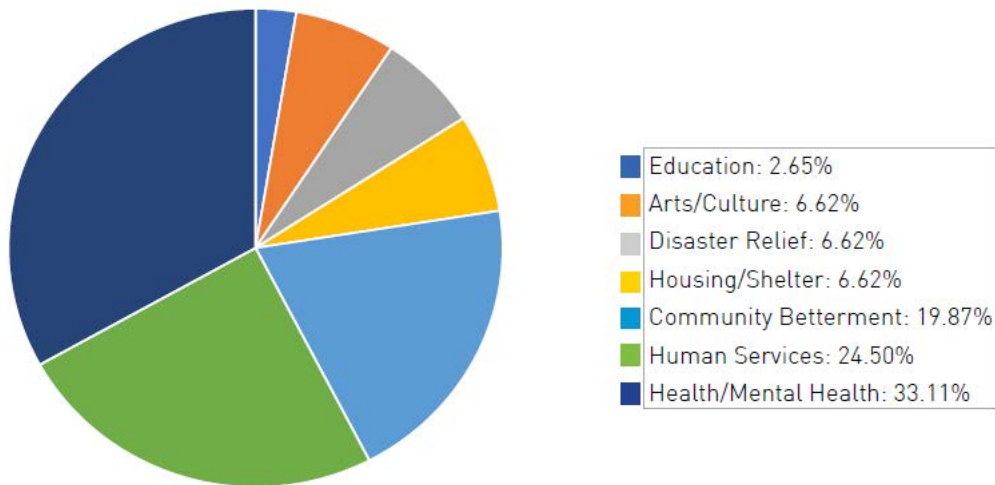
Nicolette Silva, JD  
Director,  
Donor Relations

# GRANT SUMMARY



Organization	Amount	Designation	Date
Church of the Ascension	\$1,000.00	For general support.	04/25/19
Clearwater Free Clinic	\$1,000.00	To support the misson.	04/25/19
Morton Plant Mease Health Care Foundation, Inc.	\$1,000.00	To support the misson.	04/25/19
Morton Plant Mease Health Care Foundation, Inc.	\$1,000.00	For general support.	04/25/19
Religious Community Services, Inc.	\$1,000.00	For general support.	04/25/19
The Arc Tampa Bay Foundation, Inc.	\$250.00	To support the mission.	05/01/19
Children's Home Society of Florida	\$1,000.00	To support the mission.	05/25/19
Lighthouse of Pinellas, Inc.	\$1,000.00	To support the mission.	06/25/19
Morton Plant Mease Health Care Foundation, Inc.	\$1,000.00	For Women in Philanthropy	07/27/19
Morton Plant Mease Health Care Foundation, Inc.	\$1,000.00	To support the misson.	12/30/19
The Khmer Magic Music Bus	\$1,000.00	To support the mission.	12/30/20
Church of the Ascension	\$5,000.00	To support the misson.	12/30/20
Clearwater Free Clinic	\$250.00	To support the misson.	12/30/20
Religious Community Services, Inc.	\$250.00	For general support.	12/30/20
Children's Home Society of Florida	\$500.00	To support the mission.	12/30/20

## COMPREHENSIVE LIFETIME GRANT MAKING BY CATEGORY





THANK YOU



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110 Central Avenue, St. Petersburg, FL 33701  
[cftampabay.org](http://cftampabay.org)